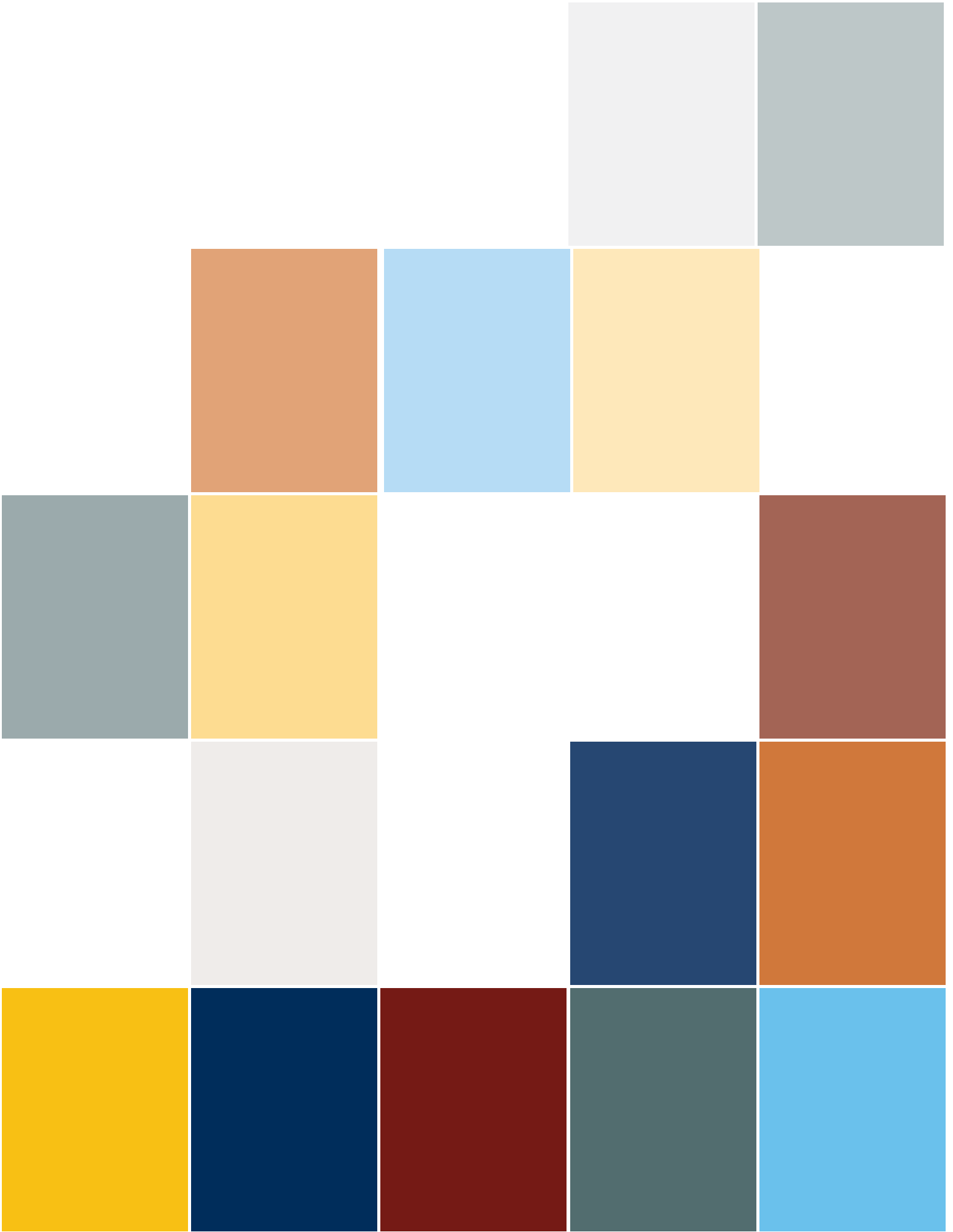




USC CENTER FOR RELIGION AND CIVIC CULTURE
for the Conrad N. Hilton Foundation Catholic Sisters Initiative

Nurturing *Vitality*

An Exploratory Study of Long-term Planning
Among US Religious Congregations



Introduction: Sowing a Legacy

In 1912, four German Pallottine Missionary sisters missed a trans-Atlantic trip that they had scheduled on the Titanic, instead taking the next boat to the United States. With “God watching over them and their mission,” they eventually wound up in West Virginia to set up a medical clinic in an impoverished area.¹

Over the next decades, the Pallottine order would go on to establish hospitals in West Virginia and run schools across the Mid-Atlantic and Midwest, and grew to include hundreds of sisters. While there are still 550 sisters in the order internationally, today the US congregation has only 19 sisters. In recent years, the Pallottine Missionary Sisters have sold both of their hospitals in West Virginia and set up hospital conversion foundations that are dedicated to the health care needs of their local communities.

Many congregations of women religious in the US are on a similar path. Starting small, they grew their membership and established large institutional footprints over the course of the 20th century, and now have returned to smaller sizes. Today, sisters are going through the process of discerning how to carry their charism forward. For the Pallottine Missionary Sisters, that meant establishing “a foundation that lives on long after the sisters are gone.”

The Center for Religion and Civic Culture (CRCC) at the University of Southern California conducted an exploratory study to identify approaches that women religious and their congregations in the United States are using to address the issues of aging, retirement and vitality. This study is part of CRCC’s activities as the Measurement, Evaluation and Learning (MEL) partner for the Conrad N. Hilton Foundation’s Catholic Sisters Initiative. Research on the vitality of congregations of women religious, and how they are responding to the challenges and opportunities of aging and retirement, was identified as a concern by the Catholic Sisters Initiative team and the Conrad N. Hilton Foundation’s Board of Directors in 2018.

One of the goals of the Catholic Sisters Initiative is to support the vitality of congregations of women religious. In the global north, it has supported research to understand what vitality means to Catholic sisters and projects geared to increasing the number of women who become sisters. In light of CRCC’s findings that philanthropy is unlikely to dramatically increase the number of women joining religious congregations, the Catholic Sisters Initiative asked CRCC to conduct research about how US congregations are nurturing their vitality as they grow older and smaller. This study will help the Catholic Sisters Initiative to implement Phase II of its strategy (2018–2023).

CRCC used purposive sampling, interviewing women religious and congregations who responded affirmatively to our inquiries about the prospect of including their stories in this report. By speaking with sisters from seven congregations across the country, CRCC aimed to capture the geographic diversity of sisters, along with a representative range of challenges and strategies in response to aging. The following report includes case studies of five of the congregations. Each of the cases includes a basic overview of the congregation’s history and ministries as well as the key challenges illustrated in the case study, which are more fully detailed in the narrative.

This study is exploratory in nature and is not meant to be representative of the entire experience of and response to aging, retirement and vitality among all women religious in the United States. These cases reveal common themes and offer a portrait of the changing face of Catholicism in the United States.

CRCC found that long-term planning is enabling the congregations studied to remain vital—able to adapt to new challenges with a sense of possibility. Further, they are nurturing their vitality on three levels: within individual sisters, their institutions and partnerships. All of the congregations studied are developing internal structures that will allow their charisms to continue after them, with essential support from networks and lay people. And as is consistent with CRCC’s finding that the formation of sisters is a lifelong process, the sisters we interviewed spoke of the need for continued spiritual support as they age.

These themes are reflected in the recommendations for the Catholic Sisters Initiative’s grant-making strategy, namely that future investments could:

Encourage a healthy, realistic attitude around health and well-being as an essential component of lifetime formation.

Provide consultants—particularly for smaller, less resourced congregations—to advise on technical and spiritual strategies to support congregational vitality, aging and retirement.

Expand the availability of TRENDS software and other technologies to assist congregations and their members in planning for their future.

Engage in partnerships with organizations currently supporting congregational vitality and make their resources more widely available.

Support networks of organizations and congregations to disseminate useful models addressing the challenges of aging and retirement.

These recommendations will be explored in more detail through the congregational case studies in this report and in the final recommendations section that follows.

CRCC found that, in their approach to both their present ministries and the legacy they hope to leave for future generations, the congregations studied were very much vital congregations, offering direction and inspiration for other communities of women religious. It is CRCC’s hope that the issues and learnings uncovered in the five case studies will inform the Catholic Sisters Initiative as it seeks to “give aid to the sisters.”

The Story of Richwood's Sacred Heart Hospital

On August 21, 1912, the first Pallottine Sisters, Sr. M. Frances, the superior, Sr. M. Alacogue, Sr. M. Prisca, and Sr. M. Dominica came to Richwood.

Rev. Father Nicholas Hengers, M. S., had invited the four Sisters to come to his parish and open up a parochial school. They came here from Niagara, New York, where they had stayed for 3 months.

The Sisters found temporary living quarters in the home of Mrs. Holzhauser, until the school building was ready for class rooms and living quarters for the Sisters. The home was very small and lacked many conveniences, but was used for



Motherhouse Limburg in Germany, Sr. M. Alphonse and Sr. M. Scholastica. The latter replaced Rev. Father Hengers in school and taught the upper grades.

On November 27, Thanksgiving Day, the ladies of Richwood had secretly prepared a wonderful surprise for the Sisters. They assembled in the school building and brought many welcome gifts, coffee, sugar, potatoes, flour and others. This of course was very welcome, and also badly

teaching the children, and all the necessary things. The two Sisters, Sr. M. Scholastica and Sr. M. Scholastica prepared for the rural examination which took place at the Sacred Heart in Buffalo, N. Y., in 1913 and passed.



the Catholic rectory. The Sisters procured for the building \$1,000, and some, whose neighbors, children, at the time, number of the school,

who were on the staff over a long period of time were Sr. M. Agnes, Sr. M. Innocentia, Sr. M. Calista, Sr. M. Vincentia, Sr. M. Alacogue, Sr. M. Magna, Sr. M. Gottfreda, Sr. M. Annunciata, and Sr. M. Delores.

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Photos Courtesy of Pallottine Missionary Sisters

Context

The congregations profiled in this report reflect broader trends within American Catholicism and religion in general. Many congregations of sisters in the United States were founded with only a few women, who often undertook ministries within immigrant populations. As successive waves of immigrants from Ireland, Poland and other European countries arrived in the US during the late 19th and early 20th centuries, the Catholic population grew to become the largest Christian tradition in the United States, with congregations of sisters growing as well. By the middle of the 20th century, Catholic sisters ran and staffed schools, hospitals and other social service institutions, often serving poor and working-class Catholics, as well as non-Catholics, in the urban cores of rapidly growing industrial cities. The impact of the institutions established by Catholic sisters over the course of this history is so significant that, in June 2012, the United States Congress acknowledged sisters' role in establishing hospitals, clinics and schools in the US through a resolution in the House of Representatives: "H.Res. 689—112th Congress: Honoring Catholic sisters for their contributions to the United States."



Though they often worked in roles that mirrored lay professions in administration, teaching and health care, sisters typically did not receive salaries comparable to their lay counterparts, but were supported instead by their robust congregations. Moreover, sisters often did not pay into the Social Security system, relying instead on internal structures that were established to support sisters who retired or became ill. These structures were sufficient as long as the number of sisters working within the congregational ministries continued to grow. The number of Catholic sisters in the US peaked at 180,000 women religious in 1965.

For numerous reasons discussed in previous reports, the population of Catholic sisters in the US has fallen in the past decades and is unlikely to return to such numbers. As of 2016, there were 47,170 Catholic sisters in the United States. By 2035, CRCC's projections show there will be 16,310 sisters in the United States, with fewer than 4,000 of these under the age of 70.

Even with new vocations, many congregations recognize that religious life will be dramatically different for future generations. Congregations are preparing to return to the model of religious life that predominated when communities of women religious were first established in the United States—a few women seeking to support one another and serve those in need. One of the primary challenges of this evolution is that it is more difficult for smaller numbers of sisters to maintain ministries, institutions and real estate holdings that were built by a much larger spiritual labor force. The congregations in this report are seeking to nurture their vitality through intentional, long-term plans that will help them respond to these challenges and allow their charisms to continue past their own lives.

What is a Vital Congregation?

In this report, CRCC builds upon the definition offered in its previous report on new vocations to religious life: It is the adaptability of religious congregations—that is, their ability to meet challenges with a sense of openness and possibility—that makes them “vital.”

The previous report also included sustainability as an important element in the vitality of religious congregations. In other words, a vital congregation must be able to sustain sisters across a lifetime of ongoing formation and continue to support their ministries into the future.

This definition, in part, grew out of the Catholic Sisters Initiative’s goal “to contribute to an increase in the number of young women entering religious life” in the first phase of its strategy. Through the MEL process, however, CRCC found that the Foundation’s efforts are not likely to change the overall trend toward fewer sisters in the US. Sisters themselves also are reluctant to define vitality in terms of vocations.

The Religious Life Vitality Project (RLVP), supported by the Catholic Sisters Initiative, attempted to describe vitality using definitions from its research participants, who were women religious in the United Kingdom, Ireland and the United States. Across the congregations studied, women religious agreed that six themes are important to vitality: ministry; community and formative growth (which largely focused on “flat” governance within the congregation); collaboration; prayer and spirituality; new forms of membership; and “how we’re aging.” In the RLVP study, vitality also includes “living diminishment creatively.”²

Indeed, in this report, CRCC found that creatively adapting ministries to acknowledge present realities was more essential to congregational vitality than sustaining those ministries “as they have always been.” The case studies that follow include numerous examples of aging sisters adapting personally and spiritually, as well as instances of congregations similarly adapting to support aging sisters and the legacy of their ministries.

Case Studies



Dominican Sisters of Mission San Jose

CONGREGATION. Founded in 1876 (arrived in US)
Number of sisters: 120 (66 in retirement)

MINISTRIES. Education (Catholic grade schools and universities), prison outreach, nursing, hospice work

CULTURAL CHANGES. Long-term planning (starting in the 1980s), collaboration with other religious communities and nonprofits, shifting attitudes toward aging and retirement, engaging with laity while retaining the distinctive character of Dominican life



THE DOMINICAN SISTERS OF MISSION SAN JOSE began asking questions about the requirements for the long-term care of sisters nearly 40 years ago. Under the leadership of several senior sisters, and with the encouragement of the Leadership Conference of Women Religious (LCWR), the community assessed its financial and institutional sustainability as well as its ability to meet the needs of an aging cohort of sisters. According to the sisters interviewed, this self-assessment was initiated by the congregation's general administration, who were witnessing new challenges the community was facing as they were aging: emotional and health needs of sisters as they retired and returned to the motherhouse; the need to hire, manage and pay for outside human resource personnel as the community received fewer younger sisters to do this work; and adapting the physical infrastructure of the motherhouse to the diminishing physical mobility of some elderly sisters. External consultants that the community hired helped the sisters frame their approach to these challenges as a series of imperatives: Acknowledge the trend toward diminishing community revenues as sisters move onto retirement; meet these financial and human resource needs through the monetization of existing assets, including valuable real estate; leverage beneficiary bequests through the establishment of a trust; and meet the medical needs of older sisters without relying on the younger sisters who would typically provide that care.

This early planning has paid off. During the past three decades, the community closed its novitiate college, which received fewer and fewer novices over the years. Instead, new sisters would do their novitiate training at the Collaborative Dominican Novitiate in St. Louis, Missouri. Closing the college allowed the sisters to sell the property, which had a high market value as a consequence of its close proximity to Silicon Valley. Revenue from the sale supported the construction of Saint Martin's infirmary, an intensive geriatric care facility for sisters requiring such services.

The infirmary provides essential care for sisters with critical health issues or end-of-life needs. Though these services are essential for an aging community, some sisters that CRCC interviewed noted that a common attitude about the facility is that it is only a place for terminally ill sisters. As one sister quipped, "To go there is like it's the nail in the coffin." This attitude has discouraged some sisters from moving into the infirmary, unless they are ordered to do so by their superiors. Some sisters in the community have, however, sought to change this perception. They have requested to move to the facility in advance, before they require critical care, while

continuing to spend time with the rest of the community during meals and prayers. This forward-looking strategy models behavior that encourages other sisters to approach the experience of transition less fearfully and more deliberately. Furthermore, sisters said that they hope to establish in St. Martin's a culture that encourages intellectual activity and community-building for sisters with physical diminishment, but who retain strong mental capacities.

To meet the broader spectrum of its health care needs, the community has partnered with the non-profit OnLok, an adult daycare center in the Bay Area that receives federal funding through a Medicare and Medicaid elder-support program that the community has paid into. OnLok also provides 24-hour health care supervision for sisters in the infirmary.

In the past decade, the Dominican Sisters of Mission San Jose also have demolished and rebuilt a housing facility in order to promote relationship-building within a smaller community. The former structure housed 25-50 sisters, and the floor plan provided little opportunity for sisters to interact collectively. The main wing of the new building, in contrast, is designed to encourage interaction among aging or disabled sisters, who live in four sub-communities of eight to ten sisters each, with a prioress assigned to each pod. This structure nurtures intimate community, contemplative life and collective prayer, and facilitates the care-giving of the prioress and other support staff. The new building also provides an office for a registered nurse-practitioner who attends to the daily health needs of resident sisters.

The community's huge investment in the redesigned facility reflects its planning for the future as well as its assessment of near-term needs. Specifically, the community anticipates that one day, when there are no more sisters to reside in the building, the facility could be leased or sold as an assisted living residence for the lay public.

The second wing of the new structure houses an income-generating Dominican retreat facility that accommodates lay groups, including retreats for students, which provides an interaction that many retired sisters have found rewarding. Other lay-oriented programs include the Center for Education and Spirituality (CES), which offers educational and spiritual

enrichment for Bay Area residents who are interested in exploring the relationship between spirituality and the modern world. CES also houses visiting sisters during the congregation's annual retreat and hosts diverse symposiums, lectures, tutorials, workshops and roundtables to enrich individual and collective spiritual lives.

All of these developments reflect the fact that the sisters are seeking to understand health and wellness by attending to the "whole spectrum of lifelong living." That is, they seek to encourage a conversation around the question "What are the essentials?" for health and wellness by integrating the voices of sisters both at the professional stage and at the end of life. This inquiry is meant to encourage sisters to look beyond the congregation's constitution and bylaws to find wisdom and guidance in the sisters' personal experiences. Toward this end, the community has recently instituted a monthly meeting to promote dialogue around these essentials, drawing on the insights of sisters as well as the professional perspectives of lay nurses who also participate in the conversation.

This ongoing exchange is important for two main reasons. First, it allows the community to look at health and wellness as something that concerns all sisters, not just the elderly. Second, approaching the congregation's well-being as an aspect of lifetime formation reduces the tendency to see the issues associated with aging and elder-care as synonymous with "neediness"—a tendency that many sisters are particularly sensitive to. Instead, the ongoing conversation at the center of the sisters' communal life frames wellness as an essential factor in the lifetime formation of all sisters.

This represents an adaptive shift in the culture of sisters, who often sacrifice their own health and wellness in their commitment to care for others. Moreover, as some sisters age and find their mental or physical capacities diminished, they are reluctant to change their lifestyles or seek assistance. As one sister said, "I am going to be 80 years old... I still have the ability, I still have the mind—I don't know how I'll respond to that type of a thing... I could be a disaster, kicking and screaming! I don't think I will, but you never know." This reluctance to prepare for the transition into old age can put additional demands on the prioresses and lay health practitioners who care for sisters. Encouraging a vision of health and wellness as elements of lifetime formation can thus lay the groundwork for an adaptive approach to the natural processes that attend aging—in both the lives of individual sisters and the communities that sustain them.

Sisters of the Holy Family

CONGREGATION. Founded in 1872
56 sisters (fewer than 10 in active ministry)
Median age is 82

MINISTRIES. Children's health care, education

CULTURAL CHANGES. "Community in completion" transmitting its charism through partnerships or "covenants," monetization of assets, collaborating with other religious communities and nonprofits to sustain ministries

THE MOTHERHOUSE of the Sisters of the Holy Family is about a mile from the Dominican Sisters of Mission San Jose. With their charism centered around the family, the sisters have typically ministered in areas such as children's health care and education, as well as outreach to poor families and recent immigrants.

In the 1990s, with no new sisters entering and choosing to remain with the community for over 25 years, the congregation decided to become a "community in completion," which means that it would no longer accept new vocations. At the same time, the community was limited in its ability to meet the growing health needs of aging sisters with its small infirmary. Faced with this reality, the sisters began asking themselves, "What are we going to do?"

The evolving needs of the rapidly aging community of sisters were originally met through a partnership with the nearby Dominican sisters and the OnLok health care organization. For nearly two decades, the Holy Family sisters hosted the federally funded OnLok programs in their motherhouse, where sisters from their own community as well as the Dominican community would receive services. In the past few years, however, the Holy Family sisters realized they needed to downsize from their expansive motherhouse property, as the facility was becoming too difficult for elderly sisters to navigate. Over the past three years, the sisters have arranged to sell two-thirds of their valuable land and use the proceeds to construct three new cottage-style houses featuring about 50 assisted living units. These construction projects, like the Dominican sisters' similar undertakings, are built to serve the elderly and people with disabilities after there are no Holy Family sisters left to care for.

In the congregation's process of deciding to become a "community in completion," questions arose regarding the future governance of the community and the legacy of its charism. The Holy Family sisters have developed innovative strategies to perpetuate their legacy of caring for families through partnerships with businesses and nonprofits. For example, a contractual clause was built into the sale of their Fremont property that enjoined the purchasing real-estate developer to partner with a local nonprofit working on homelessness issues. This partnership means that the affordable housing fees generated from the sale will be used to establish about 60 new affordable housing units in central Fremont.

In looking toward the future governance of their aging congregation, the Holy Family sisters have established a covenant with another Dominican community in Portland that shares the Holy Family sisters' charism around care of the family. The covenant between the two communities addresses the management of day-to-day affairs as well as the continuation of the Holy Family sisters' legacy through the handling of the community's trusts. To facilitate the building of this covenantal relationship, the two communities hired a mediator to lead the process of discussion and discernment—a strategy that is becoming common among congregations that are contemplating a merger with other communities or partnerships with lay organizations that will preserve the legacy of their charism.



Sisters of St. Francis of Philadelphia

CONGREGATION. Founded in 1855
400 sisters (including 30 from a merger with another Franciscan community in New Jersey)

MINISTRIES. Impact investment, Catholic education, health care

CULTURAL CHANGES. Engaging lay partners, networking with non-profits and other faith-based groups, preparing to sell motherhouse

THE SISTERS of St. Francis of Philadelphia are in some ways an outlier among congregations of women religious in the United States: Though the community's numbers are declining—the average age is 78, and there no new novices are in the pipeline—the sale of health care infrastructure and valuable suburban land has given them financial security. This enabled the sisters to enter the world of social impact investing in the 1980s. While their financial robustness sets the community apart from many of its counterparts elsewhere in the US, the network of relationships that the Franciscan Sisters of Philadelphia have developed through their investment mission is perhaps the community's most distinctive characteristic.

"It's our charism that carries us," said Sr. Nora Nash, the director of corporate social responsibility for the congregation, who has become a well-respected expert in the field.

"This is what makes us Franciscans—our charism is to be in relationship, and to be in relationship across the board with our sisters, with you, with a sense of mutuality wherever community is."

Being in relationship with others through a ministry of socially responsible investment has entailed Sr. Nora's office joining several networks with a diverse array of faith-based and "values-based" organizations. The largest of these networks is the Interfaith Center for Corporate Responsibility (ICCR), which has about 300 institutional members. Through their work with other ICCR corporate shareholders, the Sisters of St. Francis have helped to shape human rights and environmental policy in companies like Anadarko Petroleum, Chevron, ExxonMobil and Dick's Sporting Goods, which agreed to stop selling assault rifles in response to ICCR's shareholder advocacy following the mass shooting at a Florida high school in 2018.

Another important network for the sisters' impact investment ministry is the Philadelphia Area Coalition for Responsible Investment (PACRI). While PACRI is a much smaller organization than ICCR, it allows the Sisters of St. Francis of Philadelphia to transfer some of their essential capacities to smaller, less well-funded congregations.

Smaller PACRI congregations of women religious learn from the Sisters of St. Francis' office of corporate responsibility how to assess internal financial and human resources, then project the trend-lines for those resources well into the future. According to Sr. Nora, her congregation has detailed projections of the factors affecting their mission out to 2060.

Even in the case of a congregation whose dwindling numbers and financial resources commend a merger with a more robust community, a detailed internal assessment can help to smooth the blending of sisters and ministries. That process of spiritual and material discernment helped to facilitate the merger of 30 sisters from a Franciscan community in New Jersey with the Philadelphia sisters in the early 2000s.

Despite its exceptional fiscal health, the Philadelphia congregation is already preparing for its continued diminishment in numbers and eventual completion. Plans for the future sale of the congregation's enormous motherhouse are already being developed—part of a strategy to ensure the sustainability of the sisters' mission.

The congregation sees its work with corporations and its charism of being in relationship continuing beyond the life of the community itself through the robust networks its built around impact investing and the increasing involvement of lay Catholics in this work.

"To be sustainable, we cannot live in a cocoon," Sr. Nora said. "We believe that our mission will not end when the last Sister of Saint Francis disappears from the Earth."

Sisters of St. Francis of Assisi

CONGREGATION. Founded in 1849
250 sisters (including 46 from a merger with the Franciscan Sisters of Baltimore)

MINISTRIES. Education and other services for adults and children with developmental disabilities, Cardinal Stritch University in Milwaukee, and the Franciscan Center in Baltimore, providing services to the economically disadvantaged

CULTURAL CHANGES. Merger with a Franciscan congregation from Baltimore, Wisconsin Religious Collaborative, new retirement facility

AT THE ENTRANCE of the Sisters of St. Francis of Assisi's motherhouse campus south of downtown Milwaukee is an enormous construction project—a \$41 million administrative and long-term care facility. In the near term, the building will house about 80 sisters needing some level of assistance in day-to-day living. In 2001, the Franciscan Sisters of Baltimore merged with the Sisters of St. Francis of Assisi. The amalgamated community embarked on the new motherhouse project with \$23 million from the sisters themselves and an \$18 million capital campaign (of which \$5 million has been raised as of this writing). If all goes as planned, the facility is expected to open in May 2019.

“I believe that we have a sacred trust to provide for our elder sisters,” said the sister who serves as the congregation's liaison with the construction team that has undertaken the project. The sister added, “But we've done it in such a way that not only will they be cared for, but many, many, many other people will also be cared for.”

The structure—with a large second-floor terrace and a floor plan designed to assist residents who need memory care—is intended as a legacy not just for the future of an aging congregation but for generations of lay elders who will be accommodated in the building as the number of Sisters of St. Francis of Assisi continues to decline.

“It's built for their needs more so than for us,” the sister explained. “It's a little nicer than we would have built for ourselves, but I think that's the risk we take in order to provide for the future and not just have another white elephant.”

The Sisters of St. Francis of Assisi is also a part of the Wisconsin Religious Collaborative, an inter-order project of the Leadership Conference of Women Religious (LCWR) 9th district (the state of Wisconsin) to share leadership capacities among participating communities and to create a network that will foster collaboration around other needs and challenges. The collaboration is viewed as a pilot project that can be transferred and scaled nationwide.

The idea for the collaborative emerged in the fall of 2015, when three sisters from Milwaukee attended a convening with delegates from other LCWR congregations in the district. According to one of the sisters who was in attendance, representatives from several communities said that they were concerned because their last qualified leaders were in office and they were uncertain how to manage their affairs going forward. They proposed forming a committee to look at how communities of sisters in Wisconsin might address the coming deficit of leadership and other essential capacities. The working group that was subsequently formed now includes representatives from nine of the 14 LCWR communities in the state. Grants from the GHR Foundation and the Conrad N. Hilton Fund for Sisters have allowed the nine member-congregations of the newly formed Wisconsin Religious Collaborative to undertake standardized audits of their resources—an essential step in the collaborative's goal of pooling information and sharing capacities.

A sister involved with the project said, “We're doing a survey of what are your needs now, what are your needs in the next three to five years, and then what gifts do you have to share with the collaborative? What resources do you have?”

The overseeing bishops of the participating congregations were initially concerned that a formal process of merger among the communities was underway. But, reassured that the sisters were forming a different sort of partnership, the bishops gave the project their blessing.



“There was never a question of merger,” said one sister. “It was always, how do we do this collaboratively in a way that enhances the ministries and missions and charism that we each have carried for well over 150 years, in most cases. Many are looking at this thinking it’s a possible pilot of what could be in other sections of the country.”

The collaborative consulted with a canon lawyer from the Netherlands, who told them that women religious in Europe had begun to see and plan for the diminishment of their communities back in the 1970s. “She told us that if you’re saying eventually we’re going to have this question,” one sister recalled, “then you’re already there. It’s already a reality for you even though you’re not willing or wanting to face it.”

From their merger with the Franciscan Sisters of Baltimore to their undertaking of a legacy construction project and an experimental resource-sharing collaborative, the Sister of St. Francis of Assisi have charted a path that other congregations in the US can follow.

“Never close off and say, okay, we’re all finished,” said one sister. “We need to continue to stay open and not be afraid to take those first steps. And not be afraid to do it with others, so that it’s not like we’re in this alone.”

Sisters, Servants of the Immaculate Heart of Mary

CONGREGATION. Founded in 1845

Approximately 740 sisters in seven states and Peru
Median age is 76

MINISTRIES. Catholic education, pastoral ministries

CULTURAL CHANGES. Long-term planning started decades ago,
ministry transition, implementation of TRENDS software

THE SISTERS, Servants of the Immaculate Heart of Mary (IHM) were founded in Monroe, Michigan by Reverend Louis Florent Gillet, a Redemptorist missionary, in 1845. In 1858, St. John Neumann, the Bishop of Philadelphia, invited the sisters to teach at St. Joseph School in Susquehanna, Pennsylvania. Their numbers and apostolates expanded across eastern Pennsylvania throughout the late 19th century and into the 20th century. In 1966 they built their present motherhouse in Immaculata, Pennsylvania and are known as the Immaculata branch of the IHMs.

The spiritual charism of the IHMs is love, creative hope and fidelity. Love is witnessed in the sisters' daily devotion to God and the people they serve. Creative hope is centered in the sisters' trust of God, while fidelity is woven into their commitment to their vocation and mission for the Church.³

The sisters' primary apostolate has been in Catholic education, but they also work in a wide variety of other apostolates, including counseling, pastoral ministry, and hospital and prison ministries. The sisters have taught generations of young Catholics, from kindergarten through university, and their ties with local parishes and schools have endeared them to many members of the local Catholic community.

In the early 1990s, around three-quarters of the sisters were in compensated ministries that carried some health and retirement benefits. This is not the case today, with many IHMs providing contributed services to parishes with little or no compensation.

"At this point we have many sisters who still have the energy and the expertise to help in the different ministries," one sister said. "I come from school ministry originally, so that's the one that I see most clearly. They prefer to keep working. And many parishes at this point, with the way that Catholicism is being challenged, do not have the wherewithal to pay full stipends."

The IHMs have a congregational culture that fosters learning and is deeply rooted in their educational ministries. This environment has made them open and reflective about the ongoing changes they have witnessed in the Church, their congregation and society as a whole. In conversations with sisters, they referred back to their General Chapter meeting in the late 1980s as a key milestone in their thinking about the future of their congregation. This meeting coincided with the release in 1986 of the "Retirement Needs Survey of United States Religious," by the Arthur Anderson accounting firm, and the founding of the Tri-Conference Retirement Office, the precursor to the National Religious Retirement Office, under the United States Conference of Catholic Bishops.⁴

At the 1988 General Chapter meeting, members began to share their thinking around formally supporting "ministry transition" to assist sisters in approaching the next stages in their lives. Ministry transition for the congregation has evolved over the years, moving from a simple binder containing guiding documents and resources to the development of programs that support sisters over their summer periods, when schools are on break, to enable them to explore other ministries to see whether they might be interested in pursuing them in the future. "Ministry transition" has now been fully embedded into the lifetime formation culture of the IHMs.

In contrast to some of the other congregations interviewed for this report, the IHMs still have an active discernment program and host discernment weekends for young women. They recently had one sister take final vows, and there are four sisters in postulancy. Despite the closure of many Catholic schools in the Archdiocese of Philadelphia over the last two decades, these sisters have remained a visible presence in local parishes and schools. The sisters stated that many young women attend the meet-and-greet weekends, and this generally translates to one or two vocations per year. Because the sisters still have women entering their congregation, albeit at much smaller numbers than in the past, there is a strong focus on prudent planning for the future of the congregation and its ministries.

The IHM sisters are invested in data-driven decision-making when it comes to planning for their future. Initially, they used a 12-year cashflow program to keep track of their finances, but then switched in the 2000s to TRENDS software (the acronym stands for “tracking, revenue, expense, net assets, demographics and savings”). This software, which is available through the Resource Center for Religious Institutes (RCRI), allows congregations to forecast their needs into the future. In the case of the IHMs, the software was invaluable to their planning for Camilla Hall, their congregational retirement home. TRENDS helped the congregation to decide on a smaller skilled-care addition to their facility with fewer beds, based on the program’s demographic projections. They also use TRENDS for their ministry planning.

The sisters interviewed emphasized that congregational decisions for their future are evidence-driven, and that much of this data come from their use of TRENDS.

One sister said: “The more good data that you have about yourself, the better you’ll be able to move yourself into the future, or unfortunately as the canon law workshop had focused on, knowing when it’s time to bring yourself to completion or to consolidation with another congregation.”

In addition to their data-driven decision-making, the IHM sisters also draw on their local Catholic network for resources to support ongoing formation and congregational vitality. The sisters mentioned that local Catholic universities (for example, Villanova University and Neumann University) have offered programs around formation and aging issues in the past and are a major educational resource for congregations in the area.

At the national level, the IHMs have worked with the Leadership Conference of Women Religious, the Inter-Congregational Collaborative Retirement Group, the National Religious Retirement Office (NRRO), Support our Aging Religious (SOAR!) and the aforementioned RCRI on issues of congregational vitality, ongoing formation, aging and retirement issues. The congregation has been shrewd about tapping available resources, including applying for SOAR! grants that are available for up to \$25,000 every other year.

The financial savviness of the congregation was also recognized by NRRO, which deemed the IHMs as having fully funded retirement liabilities. The congregation currently has a “support fund” that operates on a living expense model. On an annual basis, the congregation reviews each convent separately, identifies its financial needs, then supplies that needed amount from incoming stipends and salaries. Any amount that is unused at the end of the year goes into the support fund. The fund is used solely to support Camilla Hall and the needs of the retired and elderly sisters who live there. The fund is still growing and supporting elderly sisters.

The IHM sisters interviewed for this report recognized that their congregation is doing relatively well compared to many other congregations of women religious in the United States. They recommended that more resources, such as SOAR! grants, be directed and advertised to smaller congregations that are struggling to meet the needs of their members.

“The more good data that you have about yourself, the better you’ll be able to move yourself into the future.”

Analysis & Recommendations

The case studies in this report capture some of the varied experiences of congregations of women religious in the United States as they respond to issues around congregational vitality, aging and retirement. Across the congregations studied, CRCC found that sisters are grappling with these issues on three levels:

1 On the personal level, sisters are not immune to the challenges of aging, the fear of death and the sadness of losing cherished members of their community. Additionally, sisters also struggle with grief over knowing that their “way of life,” as one source put it, may not continue in the future. While the sale of a ministry or real estate holding might be logically the best financial move, and may enable a smaller number of sisters to continue their charism in other ways, it might nonetheless be a difficult decision to make. Processes such as entering into a covenant with another congregation to manage finances require a period of discernment, and may face opposition from those who resist change. And as one person said, young sisters may not necessarily be the “visionary” ones, and can struggle with grief and loss as much as older sisters.

2 On a second level, sisters also must deal with questions of **what to do with their institutions**. This includes congregational governance—who will lead the congregation as the number of sisters declines? It involves understanding a congregation’s assets and how to leverage them, as well as what its financial needs will be, going into the future. Congregations also are planning for the future of their ministries. All of the congregations studied have sold ministries or real estate holdings. The assets from these sales not only support sisters as they age, but also are used to advance the charism of the congregation, whether through impact investing, a foundation or the future use of facilities being built for the care of elderly sisters and of the general public.

3 Finally, the congregations studied are not operating in a vacuum, but **reaching outward to connect with external partners**. They are accessing resources, such as leadership conferences, the Inter-Congregational Collaborative Retirement Group, the National Religious Retirement Office, Support our Aging Religious (SOAR!) and the Resource Center for Religious Institutes. Some congregations have worked with other congregations, typically within the same spiritual tradition (e.g., communities of other Franciscan or Dominican sisters). Finally, the congregations often worked with qualified laypeople, such as financial professionals, to create their plans and to operate ministries.

The recommendations stemming from this research are a combination of ideas derived from the interviews and direct recommendations from sisters in these congregations. The following recommendations should be seen as a launching point for further research and discussion on congregational vitality, retirement and aging.

Encourage a healthy, realistic attitude around health and well-being as an essential component of lifetime formation.

A range of attitudes around aging, retirement and vitality emerged out of these congregational case studies. Congregations, and even individual members, respond differently to the challenges of growing older. Sisters, like many people, struggle with their own mortality as well as the prospect of leaving ministries that they have invested their energies into for decades. Some congregations have the financial and human resources to develop internal ministry transition and counseling support systems to aid their members, while other congregations struggle to meet the basic needs of their elderly sisters. Supporting congregations to provide services, programming and counselling around issues of mental and physical wellness and health throughout sisters’ lives, from entry to end of life, is key for encouraging a healthy, realistic and positive attitude around aging and congregational vitality.

Aging, retirement and vitality are an integral part of the lifetime formation continuum. By supporting ministry transition programs, sabbaticals for sisters, meetings or conferences that focus on vitality and aging—along with other spiritual and vocational counseling efforts that are integral to ongoing formation—the Catholic Sisters Initiative could help to foster a healthy, realistic attitude around aging and congregational vitality for sisters in the United States.

Provide consultants—particularly for smaller, less resourced congregations—for technical and spiritual issues related to congregational vitality, aging and retirement.

Even though communities of women religious in the US face common sets of challenges, the personal and organizational experiences of a particular congregation and its membership are unique. Having consultants available to accompany sisters on this journey would likely be more effective than offering

standardized resources and trainings. In fact, the process of overcoming personal and organizational fears, habits and inertia can only be undertaken successfully in a relational way, according to CRCC’s organizational experience of building capacity within congregations and faith-based community development corporations.

There are existing organizations such as NRRO and RCRI that provide technical consultants for congregations. The Catholic Sisters Initiative could work with partners within the spiritual traditions of congregations, national religious conferences, the US Conference of Catholic Bishops and nonprofits that support and advise around retirement and aging issues. These partnerships could help to identify technical and spiritual consultants, and provide financial support for them to advise congregations in need.

Expand availability to TRENDS software and other technologies to assist congregations and their members in planning for their future.

Expanding access to valuable aging and retirement resources (e.g., TRENDS software, financial planning products, canon law advice)—especially for congregations that are struggling with retirement liabilities, asset management and planning issues around the legacy of their charism—would honor the work of many sisters and congregations who are now facing congregational completion or a greatly diminished presence in the coming decades.

Engage in partnerships with organizations currently supporting congregational vitality and make their resources more widely available.

Congregations in this study identified several national Catholic organizations (e.g., NRRO, SOAR!, RCRI, LCWR) that work closely with congregations on issues of aging, retirement and congregational vitality. The sisters we interviewed also mentioned some unique actors in this space that are working to bolster the resources (financial and human) that are available to sisters for aging and retirement issues. Among these organizations are secular non-profits (e.g., OnLok), government agencies and universities. Sisters and their congregations in the US have widened their net of supporters beyond the Catholic sphere to creatively respond to the challenges they face as they age and retire from active ministries. The Catholic Sisters

initiative could support traditional actors such as NRRO and SOAR! as well as explore investment in non-profits that currently partner with congregations. Targeting investments toward organizations that support congregations with significant retirement liabilities (in other words, small congregations that are struggling to meet the needs of their elderly members) is another funding opportunity that was identified by many of the congregations in this study.

Support networks of organizations and congregations to disseminate useful models addressing the challenges of aging and retirement.

Beyond the networks that are most familiar to sisters (i.e., national religious conferences and other Catholic organizations), there are existing webs of connection centered around spiritual traditions—Franciscans, Dominicans, Benedictines and Carmelites, for example—that share cultural norms as well as organizational information and resources, such as experience with canon lawyers and outside consultants like those that were mentioned frequently in discussions with the congregations in this study. These networks could be supported in targeted ways to provide information and resources to congregations in need.

There are existing models and best practices around aging and vitality that have been tested by congregations and organizations that are supporting women religious in the US. Some of these resources have been identified in this report, and others have been documented by other organizations, such as the NRRO/CARA 2004 report, “Planning for Retirement and Mission: A Best Practices Study.” The challenge is that these models and best practices are not disseminated widely across networks of religious congregations, which is particularly problematic for smaller congregations that may not have the financial and/or human resources to attend meetings or be connected to major network pipelines of information and data-sharing.

Conclusion

Catholic sisters in the US have long been leaders in their fields of work and ministries. Today, sisters continue to be exemplary in their approaches to creatively adapting their communities' lives and missions as they grow smaller. Their generosity can be seen in the way their long-term planning accounts not only for themselves but also for other congregations and the communities they serve. Any successful approach to the challenges of aging congregations of women religious in the US must address the personal, congregational and external factors that shape how communities of sisters are experiencing this period of transition and planning for the transmission of their charism to future generations.

These concerns may seem remote from the lives of sisters in Sub-Saharan Africa, India and Southeast Asia, where congregations are growing and ministries are expanding. But the basic capacities that support the needs of sisters in the US—effective data-gathering, robust networking and an openness to new partnerships—are no less important to sisters in the developing world. It is important to respond to the particular needs of sisters in diverse cultural settings and dramatically different circumstances. Still, by conceiving of its funding strategy in the US as a means of building essential know-how that is transferable to sisters elsewhere, the Catholic Sisters Initiative can take concrete steps toward building a truly global sisterhood.

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