

Catholic Sisters Initiative Measurement, Evaluation and Learning Webinar

February 26, 2020



Outline of Presentation

- I. Overview
- II. General Recommendations
- III. Key Indicators of Progress
- IV. Questions



Overview



Sisters Education

STRATEGIC OBJECTIVE Increase the financial and human resources capacity to sustain congregations of Catholic sisters and their services

- 2000 sisters undertake leadership training
- 500 congregations have benefited from post-secondary training
- 400 Sisters completing formation or formators training and continuing formation and sabbatical programs
- 100 congregations in the improvement process that have strengthened a subset of organizational elements
- 800 sisters have completed degrees





Human Development Services

STRATEGIC OBJECTIVE Increase the financial and human resources capacity to sustain congregations of Catholic sisters and their services



Congregational Capacity:

- 8 to 10 congregational or confederation members lead an initiative focused on youth or young adults
- 10 congregations with improved service provision skills and capacity for meeting the needs of youth and young adults, relative to a baseline of capability established in the first year of the five-year strategy period
- Public and private resources leveraged to support sisters' human development work



Human Development Services



Serving People:

- 300,000 youth and young adults are reached through grant making
- 1000 children from dual language immersion programs
- 5000 students of low-income households and their families served in Catholic school communities in the Archdioceses of Los Angeles



Knowledge Generation and Management

STRATEGIC OBJECTIVE Collect, use and disseminate research and program data to improve the practices and policies of Catholic sisters' congregations, conferences and partners, and to increase external knowledge



- 22 sisters trained as data trainers
- 2 new data centers for Catholic sisters developed in Africa
- 1 longitudinal study
- 15 research-based analytical papers published or presented



Innovation and Sustainability Portfolio

STRATEGIC OBJECTIVE Create sustainable solutions to challenges to the vitality of Catholic sisters' organizations and ministries



- ☑ Expert advisory groups delineate areas for investment
- ☑ 4 – 6 areas identified for investment
 - Grants made to two scoped projects within areas identified for investment

Future:

- Scoped and funded projects result in evidence-based solutions to core problems

Cross-Cutting Themes



Collaboration and Networking

- Increase in number of sisters participating in NGO human development/data networks and number of sisters taking active leadership roles in NGO networks



Communications

- Increased press coverage (broadcast, print, social media) of sisters' work and increased media coverage of sisters as advocacy voices





General Recommendations

Units of Analysis

- Catholic sisters
- Congregation
- Youth/young adults

Other General Recommendations

- If you are providing training to sisters you should be quantifying the number of classroom hours that is required to complete each training program
- If you are working in HDS area of work or type of work should be codified using the UN SDGs

Other General Recommendations

- Communications metrics
- Social media metrics
- Networking activities

Important Definitions

- **Unique sister:** When asked to provide a count of unique sisters, please provide the number of distinct individuals without duplication, even if the individual may have participated in numerous programs

Important Definitions

- **Unique congregations:** In addition to collecting in these units you also need to be able to provide the number of distinct congregations without duplication so we know the total number of congregations who have participated without duplications

Important Definitions

- **Baseline:** If your grant is doing any work related to improving a congregation or a program you will need to be able to measure improvement over time this often requires something known as a baseline which is the starting point used for comparison.

Capturing Other Data

- **Notable non-strategy outputs and outcomes:** There will be things that you are doing that are not measured by the key indicators of progress but are important to your project and the Catholic Sisters Initiative. You should be keeping track any notable non-strategy outputs and outcomes.



Key Indicators of Progress



Sisters Education Portfolio

Increase the financial and human resource capacity to sustain congregations of Catholic sisters and their services.

<i>Indicator</i>	<i>Target</i>
Number of congregations benefiting from their members' post-secondary training	500 congregations have benefited from post-secondary training

Definition

- Total number of congregations benefiting from their members' post-secondary education/ training. To benefit a congregation, a sister must return to their congregation after receiving a post-secondary degree and/or training and implement a change that improves organizational processes (financial, fundraising, human resources, programmatic, etc.).

Data Notes

- Collect data on type of benefit, description of benefit, number of congregation, number of sisters with completed degrees, number of sisters with completed training.
- Types of Benefits: Improved financial systems, fundraising, human resources, enhanced programs, enhanced communications, better data collection, along with higher morale, increased productivity and quality of work, employee retention, improved programmatic results/reach, money earned/raised, increased earnings, etc.



Sisters Education Portfolio

Increase the financial and human resource capacity to sustain congregations of Catholic sisters and their services.

<i>Indicator</i>	<i>Target</i>
Number of sisters who complete capacity-building training in finance, management or a ministry-related technical area	2,000 sisters undertake leadership training

Definition

- A training focused on helping sisters undertake a human development service can be reported to this indicator as a ministry related technical area. Ministry related technical training can be internally focused on building congregational capacity and externally focused on programming.
- Training does not include conference attendance, formation activities or interculturality training or activities.

Data Notes

- Name of training program
- Type of training (e.g., finance, management)
- # of hours to complete training program
- # of sisters completing the program, # of unique congregations (in relation to sisters trained)



Sisters Education Portfolio

Increase the financial and human resource capacity to sustain congregations of Catholic sisters and their services.

<i>Indicator</i>	<i>Target</i>
Number of sisters completing post-secondary education degrees	800 sisters have completed degrees

Definition

- Total number of sisters completing post-secondary education degrees. A post-secondary degree is any degree that follows a high school (or the equivalent) diploma, including AA degrees, bachelor's degrees, master's degrees, PhD etc.

Data Notes

- Type of degree earned
- Specialization (e.g., Master of Public Health)
- # of sisters graduated with completed degrees
- # of sisters in process of completing degrees
- # of unique congregations (in relation to sisters graduated)



Sisters Education Portfolio

Increase the financial and human resource capacity to sustain congregations of Catholic sisters and their services.

<i>Indicator</i>	<i>Target</i>
Number of sisters completing formation or formators' training and continuing formation and sabbatical programs	400 sisters completing formation or formators' training and continuing formation and sabbatical programs (Phase II)

Definition

- This broad measure captures a range of lifetime formation activities that aim to nurture sisters' identification with their congregational charism and improve their retention rates. Formation does not include lay formation and/or accompaniment.
- Formation is defined as being *sister-focused*. You may report on intergenerational activities using this indicator. You may report on any interculturality training or activities using this indicator.

Data Notes

- # of postulants/novices in the process of completing early formation
- #of sisters completed formators training
- #of sisters trained by newly formed formators
- # of sisters engaged in ongoing formation
- # of sisters engaged in sabbatical programs
- # of sisters engaged in intergenerational training
- # of sisters engaged in interculturality training
- # of training hours to complete program



Sisters Education Portfolio

Increase the financial and human resource capacity to sustain congregations of Catholic sisters and their services.

<i>Indicator</i>	<i>Target</i>
Number of congregations in the improvement process that have strengthened a subset of organizational systems	100 congregations in the improvement process that have strengthened a subset of organizational elements (Phase II)

Definition

- Total number of congregations progressing towards strengthened internal systems based on initial capacity assessment OR the implementation of a novel change.
- Internal systems include financial management, fundraising, human resources, data collection, analysis and reporting, measurement and evaluation, etc.

Definition II

- This indicator requires **either** baseline assessment to measure improvement/increased strength of internal systems **or** the implementation of something that did not exist prior to the intervention.
- To qualify for this indicator, you must either implement a new program/improvement on the congregational level or track improvements through baseline.
- *Only report on this indicator if you have received a grant specifically focused on congregational improvement **OR** a change has been implemented by a sister that did not exist before the intervention.*

Data Notes

- # of congregations with improvements
- Type of improvement
- If baseline was captured or not, how baseline was captured
- If the ICAT was implemented, frequency
- Types of improvements may include: financial, human resources, fundraising, data collection, program creation, improved staffing, improved data sharing



Human Development Services Portfolio

Strengthen the services provided by Catholic sisters to vulnerable people in measurable ways at scale.

<i>Indicator</i>	<i>Target</i>
Number of youth and young adults reached through human development services run by sisters	300,000 youth and young adults are reached through grant-making

Definition

- Total number of youth and young adults reached through human development services run by sisters. Grantees must indicate the degree of 'reach' when reporting by indicating whether a service is directly or indirectly benefiting youth and young adults (15-25).
- *Direct Benefit:* Beneficiary must have received a service to be considered directly benefited.
- *Indirect Benefit:* Beneficiary can be adjacent to services being delivered and benefited due to proximity. For example: healthier parents/caretakers, more educational options, access to clinics, cleaner environment, etc.

Definition II

- **Degree of reach** will also be measured by the level of benefit, time spent, and proportion of benefit to the target population. Types of reach include:
 - Light intervention (delivery of pamphlet),
 - Medium intervention (delivery of product)
 - Extensive intervention (on going intervention).
- Human development services include all services related to the UN SDGs, including: delivery of product, delivery of training, health services, immunization, provision of service, housing, reach to most vulnerable, advocacy, family interaction.

Data Notes

- Collect name of program/service delivered
- # of youth reached
- Direct/indirect intervention
- Light/medium/extensive intervention
- Type of service/ministry
- Description of human development service provided



Human Development Services Portfolio

Strengthen the services provided by Catholic sisters to vulnerable people in measurable ways at scale.

<i>Indicator</i>	<i>Target</i>
Number of congregations engaged in human development focusing on youth and young adults; number of inter-congregational ministries focusing on youth and young adults; other indicators tailored to ministries	8 to 10 congregational or confederation members lead an initiative focused on youth or young adults

Definition

- Total number of congregations engaged in human development focusing on youth and young adults as part of a network; number of inter-congregational ministries focusing on youth and young adults.
- For a human development service to be considered *focused* on youth and young adults, XX percentage of its beneficiaries must be between 15-25.

Definition II

- If programming is focused on training a sister in HDS related activities, implementation at the congregational level must be achieved in order to report on this metric.
- A human development services is any service delivery or advocacy effort related to a UN SDG.

Data Notes

- Name of intercongregational ministry
- # of congregations in ministry
- Type of service/ministry (UN SDG)
- Description of service/ministry
- % of beneficiaries that are 15-25



Human Development Services Portfolio

Strengthen the services provided by Catholic sisters to vulnerable people in measurable ways at scale.

<i>Indicator</i>	<i>Target</i>
Amount (USD) of public and private resources raised by congregations to support sisters' human development work	Public and private resources leveraged to support sisters' human development work

Definition and Data Notes

- Total amount (USD) of public and private resources raised by congregations to support sisters' human development work. Funds raised by sisters within a congregation can be included.
- In-kind donations can be included. Please use a reasonable estimate to assess the value of the in-kind donation.
- Volunteer hours can also be included. Please report the total number of volunteer hours.
- Report type of funding, description of funding sources, description of service(s) run by sisters supported by the funding



Human Development Services Portfolio

Strengthen the services provided by Catholic sisters to vulnerable people in measurable ways at scale.

<i>Indicator</i>	<i>Target</i>
Number of congregations with improved service provision skills and capacity to meet the needs of youth and young adults	10 congregations with improved service provision skills and capacity for meeting the needs of youth and young adults, relative to a baseline of capability established in the first year of the five-year strategy period

Definition

- Total number of congregations with improved service provision skills and capacity to meet the needs of youth and young adults. Must have been an existing program with quantifiable improvements measured against a baseline.
- Examples of improvements include:
 - Improvements in scope, scale, services, reliability, speed of delivery, quality of service, cost reduction, wait time, lessen waste/redundancy, staffing, reduce process complexity;
 - Five dimensions of accessibility: approachability, acceptability, availability/accommodation, affordability, appropriateness.

Data Notes

- # of congregations with improvements
- Type of improvement
- Type of service/ministry
- Description of service/ministry
- % of beneficiaries ages 15-25
- How was your baseline established?



Human Development Services Portfolio

Strengthen the services provided by Catholic sisters to vulnerable people in measurable ways at scale.

<i>Indicator</i>	<i>Target</i>
Number of students of low-income households and their families reached in the Archdiocese of Los Angeles	5,000 students of low-income households and their families served in Catholic school communities in the Archdiocese of Los Angeles

Definition

- Total number of students of low-income households served in Catholic school communities in the Archdiocese of Los Angeles.
- Low-income is defined as 200% of the federal poverty level (HHS Poverty guidelines). Low income can also be defined as qualification for the subsidized meal program.

Definition II

- Reported students must be unique students. If you are implementing a school-wide intervention (such as teacher training), your population is the total population of all low-income students at the school. Please report numbers based on the reporting period and update to reflect new students to the school each year.

Data Notes

- Report name of school
- # of low-income students
- # of low-income students reached
- Description of services provided to students
- Do you provide services to families of low-income students?
- Description of service(s) provided to families



Human Development Services Portfolio

Strengthen the services provided by Catholic sisters to vulnerable people in measurable ways at scale.

<i>Indicator</i>	<i>Target</i>
Number of children in dual language immersion programs	1,000 children benefit from dual language immersion programs

Definition and Data Notes

- Total number of children in dual language immersion programs. Must be unique students.
- # of unique students enrolled in dual language immersion programs



Knowledge Generation and Management Portfolio

Collect, use and disseminate research and program data to improve the practices and policies of Catholic sisters' congregations, conferences and partners, and to increase external knowledge

<i>Indicator</i>	<i>Target</i>
Number of sisters trained as data trainers	22 sisters trained as data trainers

Definition

- Total number of sisters trained as data trainers. Training must be funded by CSI and designated as a data trainer program.
- A data trainer is a sister that has received training specifically enabling her to work more effectively with data on a variety of levels including data management, data sharing, data analysis, data coding, data creation, and research.

Data Notes

- # of sisters completing training
- # of hours to complete training
- Description of training
- # of publications produced by data trainers (include citations or link)
- For alumni activity:
 - Total # of alumni for the data training program
 - How are you tracking alumni activities?
 - Description of alumni activities as relates to their training
 - Any data from alumni surveys or evaluations



Knowledge Generation and Management Portfolio

Collect, use and disseminate research and program data to improve the practices and policies of Catholic sisters' congregations, conferences and partners, and to increase external knowledge

<i>Indicator</i>	<i>Target</i>
Number of data centers for Catholic sisters developed in Africa	2 new data centers for Catholic sisters developed in Africa

Definition and Data Notes

- Total number of data centers developed in Africa. Data centers must receive a data center grant from the Catholic Sisters Initiative
- Please describe the development of the data center to date



Knowledge Generation and Management Portfolio

Collect, use and disseminate research and program data to improve the practices and policies of Catholic sisters' congregations, conferences and partners, and to increase external knowledge

<i>Indicator</i>	<i>Target</i>
Number of research papers published or presented	15 research-based analytical papers published or presented

Definition

- Total number of research papers published or presented

Data Notes

- Be prepared to submit a bibliography of all published works including books, book chapters, publications in peer reviewed journals, op-eds or essays in outside publications, and blog posts/articles on your organization's website.
- Please also include citations and links to any news articles published or articles including interviews and/or media mentions in relation to your grant-funded work.
- Citation style is your choice but be sure to include title, journal publication, date and author(s)



Knowledge Generation and Management Portfolio

Collect, use and disseminate research and program data to improve the practices and policies of Catholic sisters' congregations, conferences and partners, and to increase external knowledge

<i>Indicator</i>	<i>Target</i>
A longitudinal study tracking entrance and lifelong formation is initiated	1 longitudinal study that will track entrance and lifelong formation

Definition and Data Notes

- A longitudinal study is initiated within the time frame of the Catholic Sisters 2018-2022 strategy
- Please describe the study design including the start and end date, the progress on the longitudinal study during the reporting period, any challenges and/or changes experienced and any surprising findings



Innovation and Sustainability Portfolio

Create sustainable solutions to challenges to the vitality of Catholic sisters' organizations and ministries

<i>Indicator</i>	<i>Target</i>
Number of new projects generated that address core problems related to a congregation's viability and/or service excellence	Grants made to two scoped projects within areas identified for investment

Definition

- Total number of new projects generated that address core problems related to a congregation's viability and/or service excellence. Projects must be funded through the innovation portfolio to address issues related to financial management and/or congregational sustainability.

Data Notes

- Describe the project you are generating and how it addresses a core problem as it relates to a congregation along with the progress made during the reporting period
- Has the solution you are piloting been share and or replicated? If yes, please describe



Communications

<i>Indicator</i>	<i>Target</i>
Increased press/media coverage	Increased press coverage (broadcast, print, social media) of sisters' work and increased media coverage of sisters as advocacy voices

Definition

- Work of Catholic sisters is covered more widely and by more sources

Data Notes

Facebook followers	Instagram followers	Twitter followers	YouTube/ video views	Total Number newsletter subscribers	Podcast downloads	Unique website users	Total website page views	WhatsApp Members



Collaboration and Networking

<i>Indicator</i>	<i>Target</i>
Number of sisters participating in NGO human development/data networks and number of sisters taking active leaderships roles in NGO networks	Increase in number of sisters participating in NGO human development/data networks and number of sisters taking active leadership roles in NGO networks

Definition

- Total number of sisters participating in NGOs focused on human development. An NGO is any non-governmental organization operating in civil society including faith-based community organizations. Participation includes attending conferences, trainings, and one-off events, etc. Active leadership is defined as presenting, holding board positions, and any activities requiring sustained involvement.

Data Notes

- Report # of sisters participating in network, # of sisters active in leadership, description of activities
- Active leadership in NGO networks (e.g., head of taskforce or working group) include presenting at events, being an invited speaker, sitting on the board
- Please be prepared to provide a list all presentations and/or speaking opportunities made by organizational staff including name of staff member, name of presentation, name of conference/venue, number of audience members and date



Questions?