



Conrad N. Hilton Foundation Catholic Sisters Initiative

Strategy Proposal

Conrad N. Hilton
FOUNDATION

Rosemarie Nassif, SSND
Brad Myers
Kathleen Mahoney, Consultant

February 15, 2013

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Executive summary

Background

Conrad N. Hilton counted Sisters among his friends and supported their congregations throughout his lifetime. He ensured that his personal support for Sisters, and that of the Conrad N. Hilton Foundation, would continue through a provision in his last will and testament:

“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.”

The Foundation responded to legal challenges to the will by establishing the Conrad N. Hilton Fund for Sisters and providing it with nearly \$200 million over 26 years. The Fund has made almost 10,000 grants to support the work of Sisters with the poor and vulnerable in 143 countries.

With the legal settlement complete, the Foundation now reassumes responsibility for direct grantmaking in support of Sisters. Doing so entails building internal capacity, launching a grants program, and developing a global strategy responsive to profound, historic changes in the life and work of sisters.

A Changing Landscape

Over the past decade the number of Catholics worldwide has increased by 14 percent; the number of Sisters has decreased by 9 percent. Significant increases in the number of Sisters in Asia (18%) and Africa (26%) were offset by dramatic decreases in Europe (-20%) and North America (-27%). Whereas Europe and North America once sent missionaries to the Global South, Sisters from Latin America, Asia and Africa now minister in the Global North.

Though the number of Sisters worldwide is declining, Sisters still make tremendous contributions to human development through their spiritual witness and service to those in need. They are recognized as resourceful and efficient agents of human development, with hundreds of thousands of Sisters around the world educating students, serving the vulnerable, standing with the oppressed, promoting peace, and advocating for justice.

Yet the ability of congregations to advance human development is unevenly distributed. Some congregations are vital and productive; others are less so. Some Sisters are well prepared for religious life and ministry; others are not.

Assessing Needs

In dozens of interviews and conversations, Sisters and other experts repeatedly mentioned three interrelated capacities that affect the vitality of Congregations and, correspondingly, the contributions that Sisters make to human development.

- **Membership:** The capacity to attract, form, educate, and retain members
- **Leadership:** The capacity to exercise leadership effectively and develop new leaders
- **Resources:** The capacity to attract and steward resources (defined broadly to include not only physical assets and financial capital, but also social capital and knowledge)

In the Global North, religious life is strained by diminished capacity to attract new members. A paucity of new members has affected other areas of religious life, including size of the pool of potential leaders, and the resources needed to tend to members' needs and support sponsored ministries. In the Global South, congregations are challenged on multiple fronts: the exercise of effective leadership, the formation and education of new members, and securing the resources needed to sustain congregations.

The spectrum of philanthropic support for the ministerial work of Sisters is wide: it includes religiously motivated donors disposed to support Sisters, as well as "secular" funders who value the outcomes achieved through Sisters' efforts, regardless of Sisters' religious affiliation.

The spectrum of philanthropic support for *congregational* needs narrows considerably, largely confined to donors with personal connections to Sisters and a small number of "Catholic" foundations that generally make small-sized grants. *No foundation routinely makes larger grants to build the capacity of congregations of women religious.*

There is significant opportunity for the Hilton Foundation to build the capacity of congregations of women religious in ways enabling Catholic Sisters to contribute to human development more widely and effectively.

Proposed Strategy

The Conrad N. Hilton Foundation will partner with organizations, including associations and other foundations, in the development and implementation of strategic initiatives that build the capacity of congregations of women religious in the areas of leadership, membership, and resources, enabling Catholic Sisters to advance human development more widely and effectively.

Partnering with Others

The Foundation will work with partners whose efforts benefit more than one congregation, supporting a variety of projects (e.g., education and formation programs, systems and network building, and the generation of much needed data and research related to the lives and the impact of women religious). To leverage its investments, the Foundation will work closely with other funders.

The Hilton Fund for Sisters will be a key partner for the Foundation. The Foundation and the Fund have the opportunity to forge a strong partnership, with the Foundation benefiting from the Fund's experience and networks, and the Fund and the Foundation developing synergistic strategies that achieve greater impact together than would be possible through individual efforts.

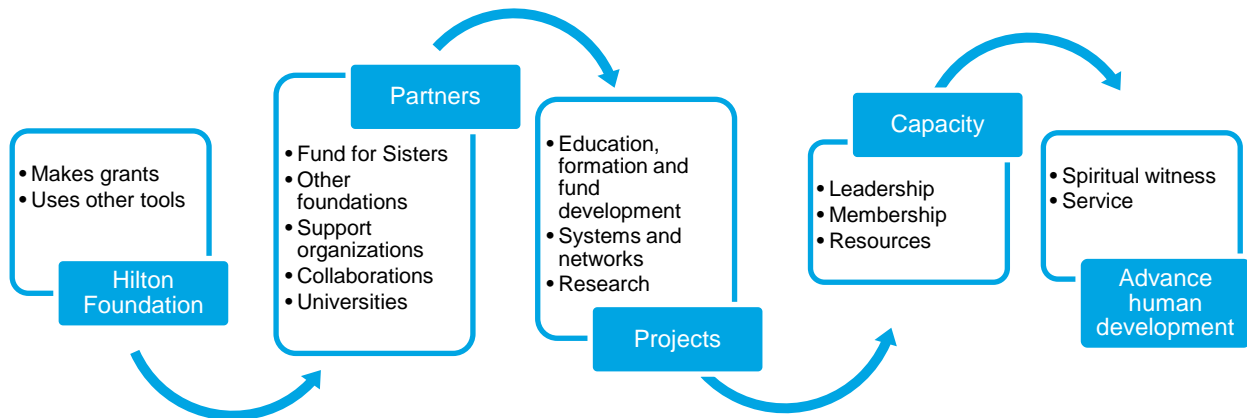
Implementation

The Foundation's Sisters Strategy will be implemented in phases, with initial focus in Africa and the U.S. where it can build upon existing relationships, networks and positive grantmaking results. After three years, it will assess needs and identify promising partners in Europe, Latin America, and Asia.

In Africa, the Foundation will focus on supporting efforts to expand and develop leadership programs, form and educate new members, and foster sustainable congregations. As a result of these efforts, Sisters will be better formed for religious life and better educated for ministerial work and for leadership roles. Congregations will be on a sounder financial footing, able to tend to the needs of their members and their sponsored ministries.

In the U.S., the Foundation will focus on supporting efforts to help congregations attract and retain new members, enlarge the pool of leaders, and improve their fund raising capacity. As a result, more Sisters under the age of 60 will be qualified leaders; more women will enter religious life; and congregations will be stronger financially through enhanced, comprehensive fund development efforts.

Addressing the Challenge



Overview: Proposed Strategy

Vision	Vital congregations of women religious whose members advance human development through their spiritual witness and service to those in need.
Strategy	Support organizations whose projects strengthen the capacity of congregations of women religious in the areas of leadership, membership, and resources, enabling Sisters to contribute to human development more widely and effectively.
Outcomes (within five years)	<ul style="list-style-type: none"> • Africa <ul style="list-style-type: none"> ✓ More Sisters with postsecondary credentials that prepare them for ministry ✓ High percentage of sisters with leadership training assume leadership positions ✓ More Congregations engage in effective financial planning • United States <ul style="list-style-type: none"> ✓ More women enter religious life ✓ More qualified leaders under 60 ✓ Higher percentage of Congregations are above 60% fully funded in terms of retirement liabilities
Result	Congregations of women religious advance human development more widely and effectively.

A commitment to Catholic Sisters

For two millennia, Catholic Sisters have spiritually enlivened the Catholic Church and served those in need. Their spiritual witness and immense contributions to human development are entwined. First and foremost, Catholic Sisters¹ are women of faith who pursue lives of holiness by living in community and taking vows of poverty, chastity, and obedience. But a vocation to religious life is not only a personal call to holiness; it is a gift to the Church and society. As Sisters strive to be the face of Christ in the world, they are found tending those in need, often on the very margins of society.

Conrad N. Hilton first encountered Sisters during his childhood in New Mexico. The Sisters of Loretto, like many congregations of women religious, were pioneers. Often at the forefront of western migration, Sisters were among the first to open schools, hospitals, and other social services in areas west of the Mississippi. Conrad Hilton learned his catechism from and deepened his prayer life with the Sisters of Loretto, who established schools throughout the Southwest.

Conrad Hilton's connections with Sisters spanned his lifetime and beyond. His relations with Sisters were warm; many Sisters became personal friends. Many of his donations supported the Sisters of Loretto in New Mexico and included funding for the construction of the Loretto Young Auditorium at Loretto Academy in El Paso and the Loretto Hilton Repertory Theater at Webster College in St. Louis. As a memorial to his parents, he helped to build the Hilton Mount Carmel School and Convent in Socorro. He also came to appreciate the Religious of the Sacred Heart in Chicago and provided significant support to Barat College of the Sacred Heart. Established in 1944, the Hilton Foundation complemented Conrad's personal philanthropy with numerous grants to Sisters and their ministries.

Conrad Hilton's will contained his most significant gift to Sisters:

"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."

Legal challenges to the will led to the establishment of the Conrad N. Hilton Fund for Sisters in 1986 as an entity within the Archdiocese of Los Angeles. Over the past 26 years the Hilton Foundation made grants totaling almost \$200 million to the Fund for Sisters which in turn has made almost 10,000 grants totaling nearly \$100 million.

The Fund for Sisters' reach mirrors Conrad Hilton's expansive vision and international business network. It has made grants to Sisters in 143 countries—a remarkable number for any foundation. Through the agency of Sisters, the Fund has contributed to human development through a wide variety of projects: caring for those affected by HIV/AIDS in

¹ "Sister" and "nun" are used interchangeably in this paper; in general, "nuns" tend toward a more cloistered life while "Sisters" are more active in the world.

Africa, solar energy projects in India, employment initiatives for the homeless in New York City, and women's empowerment programs in Central America, to name but a few.

Today, with the settlement with the Hilton Fund for Sisters complete, the Hilton Foundation enters a new phase, reassuming direct responsibility for grantmaking in support of Catholic Sisters. In so doing, it honors Conrad Hilton's wishes and reaffirms his appreciation for Sisters' contributions to human development.

Direct grantmaking to support Catholic Sisters requires building internal capacity, launching a grant program, and developing a global strategy. To develop strategic options the Hilton Foundation engaged the services of Kathleen A. Mahoney, Ph.D., a consultant with expertise in philanthropy and education, as well as experience working with women religious in North America and Africa. Developing strategic options involved

- Preparation of a landscape document on women religious
- Eight exploratory grants
- 25 interviews with staff from the Hilton Foundation and the Fund for Sisters, as well field leaders, experts and Sisters
- Ongoing research
- Listening sessions in the U.S. and Kenya
- Expert feedback from six readers/reviewers

Key Findings

Although the number of Sisters worldwide is declining, Sisters continue to make immense contributions to human development through their spiritual witness and service.

Yet in some instances, the ability of Sisters to contribute to human development is limited and compromised by diminished congregational capacity in one or more interrelated areas: the capacity to exercise leadership effectively and develop new leaders; the capacity to attract, form, educate, and retain members; and the capacity to attract and steward resources.

There is significant opportunity for the Hilton Foundation to build the capacity of religious congregations in ways that enable Sisters to advance human development more widely and effectively.

Landscape: Life of women religious

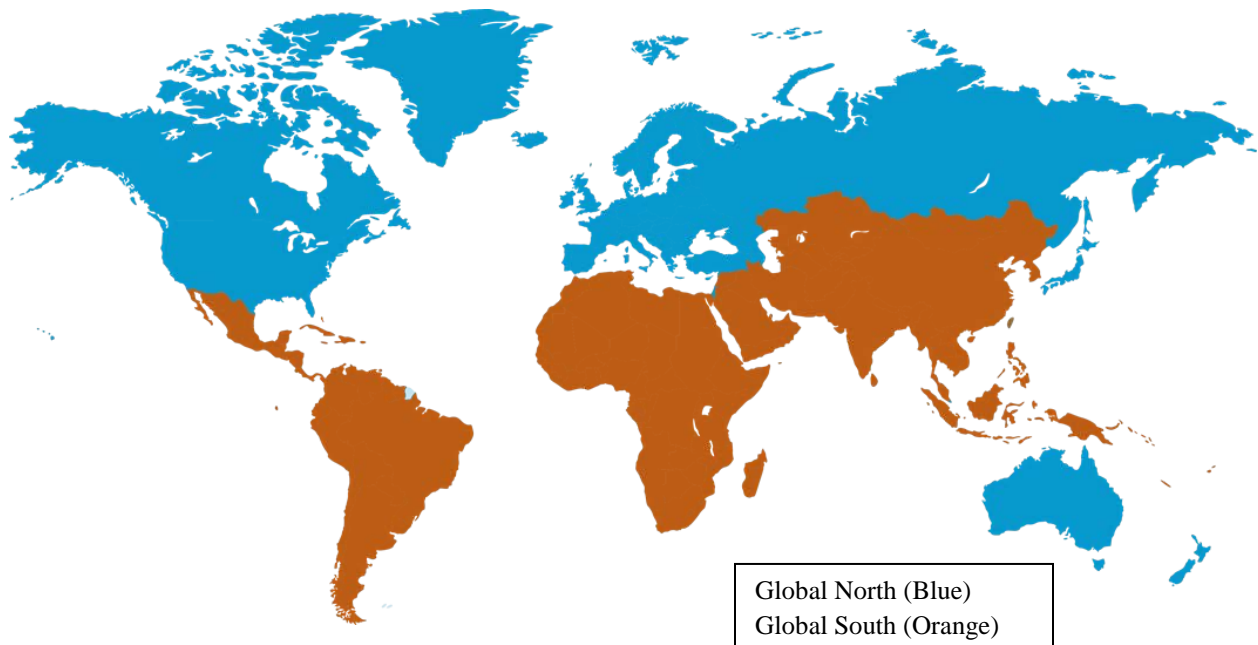
The Catholic Church holds that every individual has a vocation—a calling in life. Some are called to consecrated religious life. Becoming a sister—a “woman religious”—entails joining a religious institute (commonly called a congregation) by embracing its spirituality, adopting its lifestyle (forms of worship, dress, etc.), taking vows of poverty, chastity and obedience, and contributing to its mission.

Congregations differ, with particular emphases: some will “more closely follow Christ praying, or Christ proclaiming the Kingdom of God, or Christ doing good for the people, or Christ in dialogue with the people of this world.”² Some congregations trace their origins to the sixth century, others to the past few years. Some are international in scope and officially recognized by Rome (and called “pontifical”), while others are local and recognized by the bishop (and called “diocesan”). Some congregations are cloistered, while others are fully engaged in the world. Some are homogenous in their membership, others diverse. Some have thousands of members, others but a few.

The life of women religious is dynamic; it is experiencing significant changes driven in large measure by demographic shifts and globalization.

Global Changes

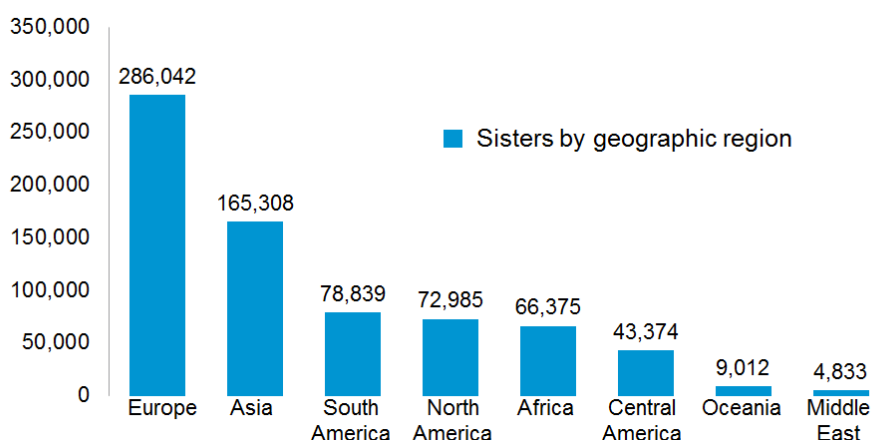
Between 2001 and 2010 the number of Catholics worldwide increased 14 percent, while the number of Sisters declined 9 percent. Rates of growth and decline are uneven. The numbers of Sisters in Africa and Asia (Global South) increased significantly, while the numbers of Sisters in North America and Europe (Global North) decreased dramatically.³



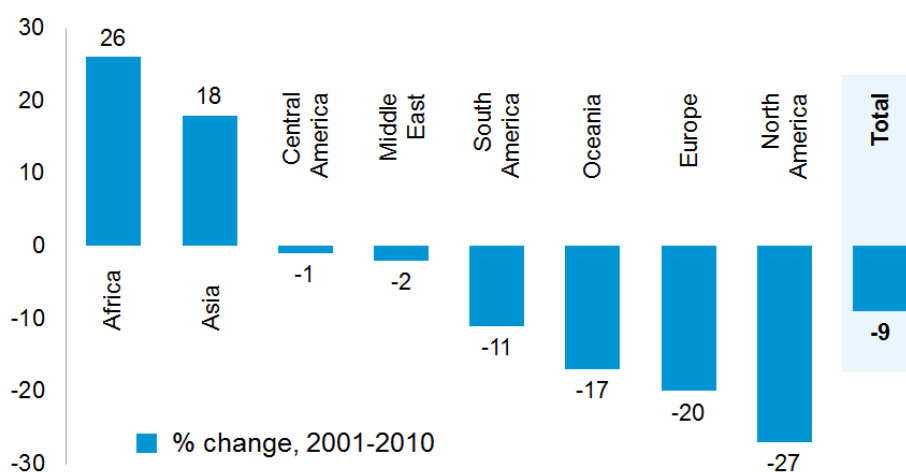
² Code of Canon Law, Canon 577

³ Statistics are from the most recent *Statistical Yearbook of the Church*, 2010.

Equal numbers of Sisters are in the North and the South



The number of Sisters worldwide is declining



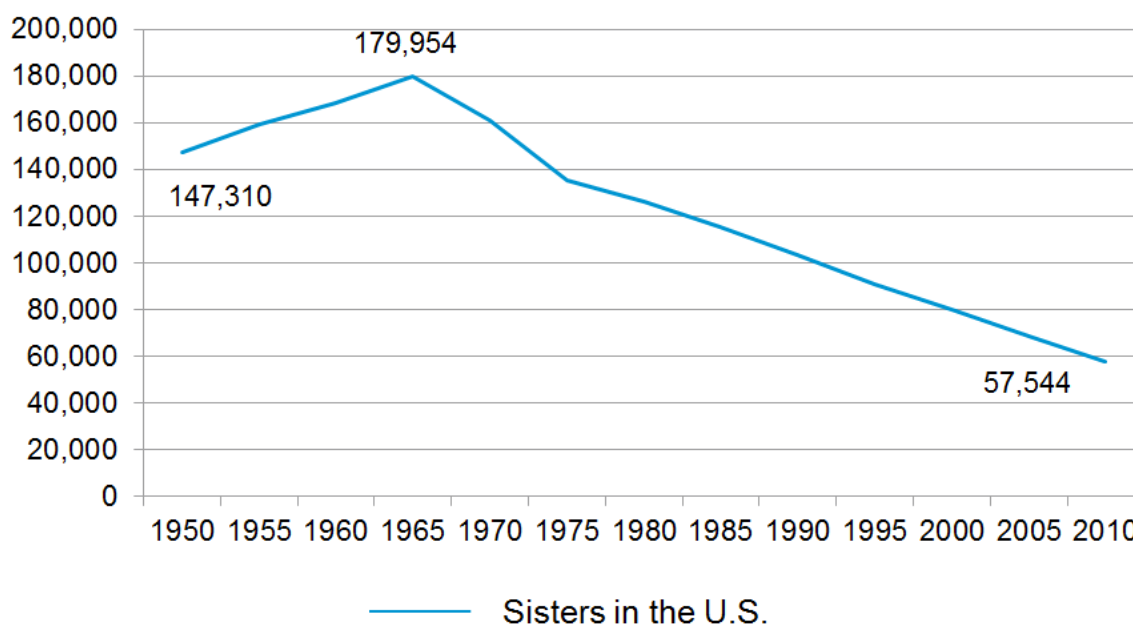
Demographic shifts have reversed historic patterns of missionary activity. For centuries religious congregations in the Global North sent missionaries to the Global South; today, congregations in Africa, Latin America, and Asia send Sisters to preach the Gospel and minister to those in need in Europe and North America.

Demographic shifts are also affecting the composition of congregations. Those congregations in the Global South that historically relied upon missionary Sisters from the North increasingly must stand on their own, with their leadership and membership becoming more indigenous, their spirituality less European or American, and their resources more local. International congregations, once dominated by Americans and Europeans, increasingly include Sisters from other areas.

Changes in the United States

As in many countries in Global North, the footprint of religious life is shrinking in the United States. After World War II, the number of Sisters in the U.S. grew dramatically, peaking at almost 180,000 in the mid-1960s. This anomalous growth was driven by a propitious but unsustainable confluence of factors: a robust Catholic subculture that prized its Sisters, large Catholic families, and a growing Catholic school system. After 1968 the number of Sisters decreased even more dramatically, driven by another confluence: Vatican Council II's renewal of religious life, the women's movement, greater career opportunities for women, new outlets for expressing one's faith, and a declining Catholic birthrate.

Sisters in the U.S. have declined by 68%



The number of U.S. Sisters in 2012 was 55,045 with 10 percent under the age of 60.

There is a small, steady stream of women entering religious life in the U.S. It is diverse. The age distribution has widened to include women in their 30s, 40s and 50s. Hispanics, Asians, and African-Americans have greater representation among those entering religious life. Another stream of Sisters—those coming to the U.S. as missionaries—contributes to a more diverse sisterhood.

Analysis: Statement of need

Conrad Hilton appreciated Sisters' ability to relieve the suffering of the vulnerable. They are recognized as effective and resourceful agents in human development. As educators, health-care providers, non-governmental organizations and community based organizations, congregations of women religious have added value, especially with regard to the reality that their members know local languages, culture, and needs, and are less transitory than many other groups.

Catholic Sisters are found in almost every country of the world; their intertwined spiritual witness and service to the poor have made incalculable contributions to human development. While it is almost impossible to overstate Sisters' contributions to human development, it is possible to paint an overly rosy picture of religious life for women. To do so would be a disservice to Sisters and those they serve. In reality, the ability of congregations to advance human development is unevenly distributed. Some congregations are vital and productive, others less so. Some Sisters are well formed for religious life and prepared for ministry, others are not. In these cases, the impact of Sisters' efforts to enhance human development is less than it might be.

Environmental factors—ecclesial, cultural, political, and economic—play a role in determining the vitality of congregations and preparedness of Sisters. For example, growing secularism in Western countries and an expanding role of the laity influence the capacity of congregations to recruit new members. Lack of access to secondary and postsecondary education for women in some areas of the Global South leaves some Sisters not fully prepared for ministry.

Yet a congregation's vitality and Sisters' effectiveness in ministry also reflect dynamics internal to congregations. In dozens of interviews and conversations, Sisters and other experts repeatedly mentioned three determinative capacities.

- **Membership:** The capacity to attract, form, educate, and retain members
- **Leadership:** The capacity to exercise leadership effectively and develop new leaders
- **Resources:** The capacity to attract and steward resources (defined broadly to include not only physical assets and financial capital, but also social capital and knowledge)

These capacities, found in all congregations in varying degrees, are interrelated: strong capacity in one area is predictive of strength in others, while weak capacity in any area is predictive of weakness in others.

Geography plays a key role: the areas of strengths and weaknesses of congregations in their capacities for membership, leadership and resources tend to differ in the Global North and South.

In the Global South

The experiences of women religious in the Global South—in Latin America, Asia, and Africa—vary greatly, yet themes emerge: the need for improved education and formation, leadership development, networking and communications, and, in some cases, the need to ensure the sustainability of congregations and the wellbeing of Sisters.

Membership. Unlike Latin America, there are significant numbers of new vocations in Asia and Africa. A preponderance of younger members can create financial strain, leaving some congregations struggling to provide new members with quality formation as well as the education needed for work in the congregations' sponsored ministries. In Africa, the situation is acute: formation for life as a Sister is often weak, and insufficient numbers of African Sisters have postsecondary education. With members unable to secure professional placements in education and healthcare, revenue streams are diminished.

Leadership. In some areas limited educational attainment undermines the capacity to exercise leadership effectively. In areas where missionary congregations have been active, questions surface about the readiness of indigenous Sisters to assume leadership of congregations and their sponsored ministries.

Resources. Many congregations lack the resources needed to tend to congregational needs and support their sponsored ministries. As financial support from congregations in the Global North decreases, religious communities in the Global South must develop new revenue streams and build their capacity to network effectively. It is worth noting that some congregations are cash poor but land rich; sustainable agriculture is a potential resource for many.

In the Global North

In the Global North, diminished capacity to attract new members has profoundly affected religious life. The footprint of religious life is shrinking, and as it does, the ability to contribute to human development wanes.

Membership. Some congregations devote insufficient resources to recruiting and forming new members. In addition, younger members often lack peers, thereby feeling isolated and ambiguous about their futures in religious life. A major study also reports some congregations are challenged by new members who are more ethnically diverse.

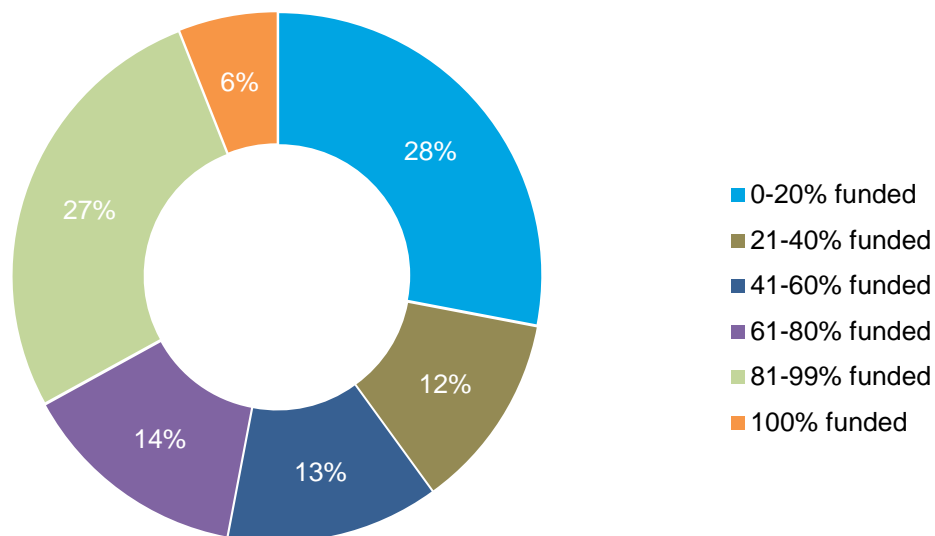
Leadership. The inability to attract significant numbers of new members has created a demographic imbalance affecting all facets of religious life. With a small pool of potential leaders, older members often serve multiple terms while younger members assume leadership before ready. Current leaders find they must focus on eldercare, finances, congregational reconfigurations, and the disposition of properties, sometimes at the expense of mission-related opportunities and issues. Staffing sponsored ministries has become challenging; lay women and men now assume roles once held by Sisters.

Resources. The preponderance of Sisters over the age of 60 has financially stressed most congregations. According to the National Religious Retirement Office, the unfunded retirement liability for women religious in the US exceeds 6 billion today and is projected to be over \$8 billion by 2030. One result: many congregations need Sisters to draw “real” salaries for as long as possible, making them unavailable for roles internal to the congregation or for ministerial work with limited compensation.

Retired Women Religious

The National Religious Retirement Office sponsors an annual collection in U.S. parishes for the support of elderly religious. In addition to distributing funds for direct care of retired religious, the NRRO helps congregations assess and develop plans to meet their retirement needs. In 2011, it collected \$27.4 million and distributed \$26 million.

422 women religious congregations: retirement funding levels



In the Global North and South

Resources. Support and membership organizations (including regional, national, and international conferences for women religious) are often understaffed and under-resourced. Vitally important, they are not always positioned to deliver high quality programs or to advocate and communicate effectively.

There is scant data and research about religious life for Sisters; the Vatican keeps only basic information (little more than the number of Sisters by nation). There is insufficient information about the nature, quality, trends, and challenges of religious life for women. Lack of research impedes strategic planning and programming for congregations and funders.

Landscape: Philanthropy and women religious

Catholic Sisters have built and staffed innumerable ministries throughout the world, ranging from hospitals, universities, and storefront clinics in sprawling urban areas to orphanages, dispensaries and schools in remote villages. Ever resourceful, Sisters have tapped a variety of sources to build institutions that have served so many—their own in-kind labor, coupled with government contracts, fees for service, investment income, and vitally important philanthropic sources.

The spectrum of philanthropic support of sister-sponsored ministries is wide. It includes religiously motivated funders who are predisposed to support the work of Sisters. It also includes funders who support sister-sponsored ministries because of their effectiveness in addressing social needs; for these funders, the organizations' affiliation with Sisters is not significant. For example, the Mercy Center in the Bronx has received support from religious groups, such as Allegheny Franciscan Ministries, as well as secular groups, including the Morgan Stanley Foundation, the Pinkerton Foundation, and Verizon Foundation. Mercy Neighborhood Ministries, Inc. in Cincinnati has secured funding from the Hilton Fund for Sisters as well as PNC Community Development, the Ohio Casualty Foundation, and the Spaulding Foundation.

The spectrum of philanthropic support for congregations themselves narrows considerably, primarily to donors with personal connections to Sisters and the world of “Catholic foundations.” Among these Catholic-oriented foundations, some prioritize Sisters because they, like Conrad Hilton, recognize the efficacy of Sisters in advancing human development.

Among foundations with an interest in Sisters, Hilton Foundation is poised to be a leader due to a confluence of factors: the size of its investment, the scope of its work, and the value of its brand.

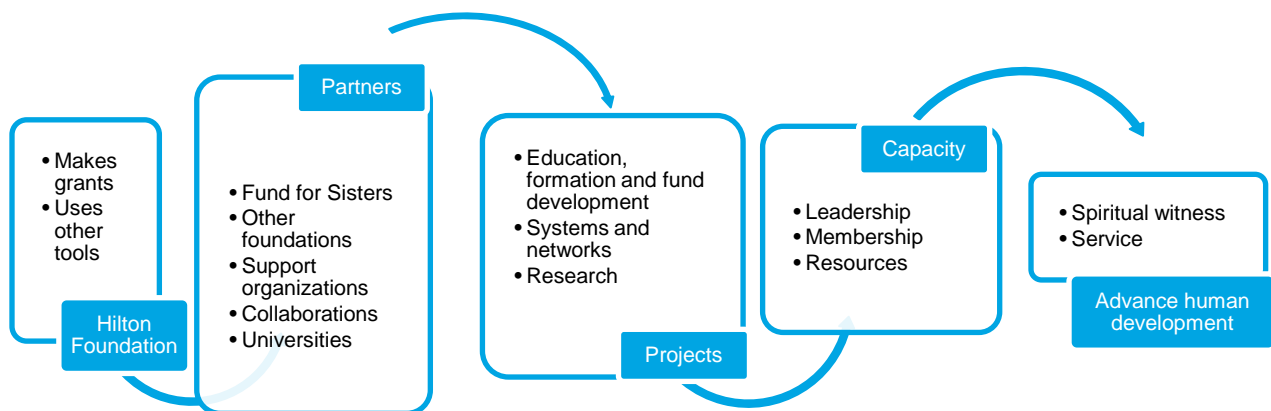
- The Hilton Foundation will fund Sisters through its Catholic Sisters Strategic Initiative at a level of approximately \$12 million annually. Few, if any, foundations are positioned to support Sisters at this level.
- Only a few foundations with an interest in Sisters have global reach.
- The Hilton Foundation will benefit from the strong reputation of the Fund for Sisters.

In summary, there are some foundations that focus on Catholic activities in general and a few on Sisters specifically. Most make smaller grants. *No foundation routinely makes large grants in support of women religious.*

Proposed strategy

Vision: Vital congregations of women religious whose members advance human development through their spiritual witness and service to those in need.

Approach: The Hilton Foundation will partner with organizations that will help build the capacity of congregations of women religious in the areas of leadership, membership, and resources, enabling Catholic Sisters to advance human development more widely and effectively.



The Hilton Foundation will work with partners able to build the capacity of women religious congregations. While the Foundation may occasionally make a grant to an individual congregation (especially a larger international group), as a rule it will work with partners whose efforts benefit more than one congregation. Ideal partners include support organizations, collaborative efforts, intermediaries, and colleges and universities.

The Hilton Fund for Sisters will be among the Foundation's key partners. The Hilton Foundation has a longstanding relationship with the Hilton Fund for Sisters and deeply values what the Fund has accomplished in supporting Sisters' work with the poor and vulnerable. It recognizes the Fund's experience, knowledge, and networks and the potential for the Foundation and the Fund to work together in powerful ways. The Foundation will call upon the Fund's experience, wisdom, and networks, and will develop synergistic initiatives that expand the impact of both the Fund's and the Foundation's efforts.

In addition to its grantmaking, the Hilton Foundation will exercise leadership by partnering with other funders, convening funders and other interested parties, advocating for Sisters, and disseminating research regarding building the capacities of women religious. Given the paucity of information about the life of women religious, the

Foundation's own evaluation efforts will be valuable for Sisters as well as other stakeholders and funders.

In the first three years, the Hilton Foundation will focus on the U.S. and Africa, where it has more experience, existing relationships, access to vital networks and successful grantmaking history. Thereafter it will conduct a needs assessment of congregations in Latin America, Asia, and Europe to determine the greatest needs and most promising partners and projects.

Strategy by Regions: Africa

Membership: Build capacity to form and educate Sisters.

Given that the number of Sisters is on the increase and congregational resources are often sparse, the Foundation will strengthen congregations by improving the quality of initial and ongoing formation of Sisters. In particular, provide high quality, culturally attuned training for those responsible for the formation of Sisters (e.g., novice mistresses) so they are better able to form Sisters for life as a woman religious. Develop a body of much-needed research that informs formation efforts; in particular, what makes for effective formation with African Sisters.

Concurrently, convince local leaders of the value of well-educated Sisters. Working with local Catholic colleges and universities, improve access to secondary, postsecondary, and graduate-level education in the relevant fields of nonprofit management, education, healthcare, theology, and social services. Investigate the possibility of delivering secondary and postsecondary education online.

Results: Within five years, training programs for formators will be expanded and improved. Congregations will invest more in the formation of new and vowed members. As a result of improved formation (which includes more robust initial screening), retention of sisters will improve within 10 years; we will see Sisters wholeheartedly embrace and live their vows in the fullness of community. Research will contribute to an understanding of what constitutes best practices in formation. In addition, more sisters will have postsecondary credentials that better prepare them for ministry.

Leadership: Build capacity to exercise leadership effectively and develop new leaders.

Develop and expand leadership development opportunities for Sisters who have recently assumed congregational leadership roles or Sisters who have leadership roles in sponsored ministries. Provide substantive, high-quality opportunities for the spiritual and practical aspects of their work.

Results: Within five years, more Sisters, assuming leadership roles, will have participated in substantive leadership development opportunities which have prepared them, spiritually and practically, for leadership positions in their congregations and sponsored ministries. Conferences of women religious will have realized goals vis-à-vis leadership development as set forth in their strategic plans.

Resources: Build capacity to attract and steward resources.

As streams of resources (human and financial) from the Global North wane, provide congregations with solid financial management training and planning. Provide complementary training in development and fundraising.

As many congregations are land-rich, promote the use of sustainable and cost effective agriculture among congregations. Locally produced food will improve nutrition for Sisters and those they serve, reduce expenses, and may create revenue streams.

Results: Congregations participating in Hilton-funded efforts will improve their financial positions, enabling congregations to meet their own needs and support their sponsored ministries. They will be able to produce basic financial reports documenting their financial position and trajectories. Revenue streams from philanthropic sources will grow. Sustainable agriculture will improve nutrition and reduce expenses.

In the United States

In the United States, the Foundation will work with support organizations positioned to build the capacity of congregations of women religious. It will partner with Catholic universities and other research institutes to produce much needed research on the life of women religious. The Foundation's work will benefit from strong relationships with other foundations.

Membership: Build capacity to attract and retain new members.

First and foremost, the Foundation will encourage vocations to religious life by supporting effective initiatives that:

- Make religious life more widely known and compelling
- Address educational debt of potential candidates to religious life

A recent Hilton-funded study found that one in three individuals discerning a vocation to religious life has student loans; half of those with loans cannot pursue a religious vocation.

Results: Together these efforts will contribute to an increase in the number of young women entering religious life. To improve retention of younger Sisters, the Foundation will sponsor research on their experiences to use as a basis for development of support mechanisms.

Leadership: Build capacity to exercise leadership effectively and develop new leaders. Support efforts to produce a larger, more capable pool of candidates for leadership of congregations and sponsored ministries. Focus on new leaders, i.e., those recently elected or appointed to leadership, as well as younger members who are likely to assume leadership roles in the future. Leadership development projects will be holistic and substantial, preparing new leaders and leaders-to-be for the spiritual and practical aspects of religious life. Projects will be attentive to new realities facing women religious and prepare participants to make critical decisions during a period of historic

organizational change. They will also address the need to prepare lay women and men to assume leadership roles once held by Sisters in their sponsored ministries.

Results: Within five years, more Sisters under the age of 60 will have experienced leadership development opportunities and assume leadership positions. Programs to prepare lay women and men to assume leadership positions in sponsored ministries will be implemented.

Resources: *Build capacity to attract and steward resources.*

Focus on building the capacity of congregations for development—for communications, fundraising, and community outreach. Fund development efforts will widen congregations' spheres of influence and networks, engaging individuals and organizations who will, in turn, help congregations advance their missions. Some individuals may respond to development efforts by volunteering, and others by working side-by-side with Sisters in their sponsored ministries, ensuring that the mission of the congregation remains vital even as the number of Sisters in active ministry declines. Some may respond by becoming associates⁴ of the congregations. Others may contribute financially. Some may even respond by becoming a vowed member of the community. The Foundation will also sponsor programs that assist congregations in developing strategies for the effective use and disposition of their properties.

Results: Congregations that participate in Hilton funded programs will realize increases in philanthropic support, volunteer engagement, and associate programs. Efforts will also identify best practices regarding property management for religious congregations; congregations will find productive ways to utilize properties for advancing their respective missions or meeting financial needs.

While the proposed strategy is phased in and grant programs developed, the Hilton Foundation may signal its appreciation for elderly religious in the U.S. by providing support to the National Religious Retirement Office. Funding could be designated for consulting and training that will help congregations with fundraising, property use, health care and assisted living consortiums, legal issues, etc.

⁴ Associates are women and men, who feeling a deep affinity for the mission, spirituality, and ministry of a particular congregation, have formalized a relationship with the congregation.

Timeline

PHASE 1		PHASE 2		
YEAR 1 2013	YEAR 2 2014	YEAR 3 2015	YEAR 4 2016	YEAR 5 2017
Launch in U.S.	→			
Launch in Africa	→			
Design evaluation	US/Africa evaluation	US/Africa initial report		US/Africa five-year report
	Refine strategy	→		
		Research other regions (Asia, Latin America, Europe)	Launch in other region(s) as guided by research	→
				Phase 2 evaluation →

Evaluation

Given the global reach of the Catholic Sisters initiative and the nature of capacity-building, evaluation will be complex. Nonetheless, evaluation processes and products have significant potential to inform Foundation grantmaking, benefit Sisters and grantees, and contribute to the philanthropic community.

An evaluation plan, based on measurable indicators, will be created following the completion of the Durham University grant for developing indicators of vitality for congregations.

The evaluation design will be built around a set of priority questions:

- What efforts are effective in helping congregations advance human development more widely and effectively?
- How do Sisters advance human development? Under what circumstances are Sisters more effective in contributing to human development?
- What does excellence in congregational leadership look like and what can be done to foster it among new leaders, given cultural differences between and among countries?
- What efforts are most effective in encouraging new vocations and retaining members?
- What constitutes effective formation and how can it be delivered effectively?
- What helps congregations attract and steward the resources necessary to meet congregational needs and advance human development?
- What can the Hilton Foundation learn about its own efforts to support Catholic Sisters?

Evaluation processes should attend to the nature of the life of women religious. Women religious are generally comfortable with collaborative, consensus-building processes. However, objective measurable data is always compelling and informative, where appropriate.