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# Advancing Philanthropic Strategy Through Evaluative Thinking: One Foundation's Approach

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## Introduction

Since its inception over 25 years ago, the Sisters of Charity Foundation of Cleveland has supported and invested in Catholic sisters and their ministries in northeast Ohio through the grantmaking, partnership, capacity-building, and evaluation efforts of its Catholic Sisters Program Area (CSPA). The CSPA staff currently support sisters in four ways:

- Nurture collaboration among congregations to address their emerging needs.
- Leverage the capacity of laity to become servant leaders in ministry, particularly young adults.
- Support ministries of Catholic sisters providing direct services to those living in and with poverty.
- Elevate innovative stories of Catholic sisters and their trailblazing ways through communication and knowledge sharing.

The declining sister presence in ministry, due to both rising median age and decades-long decline in overall number of sisters, required revision of the CSPA's existing theory of change and goal framework. The foundation launched an evaluation and learning process of the CSPA in 2020 to better understand how and if activities were leading to progress toward goals and how to prioritize and shift efforts in the future. At this point of significant transition, it was important to understand what had been achieved in a way that honored the inspiration and values of the

## Key Points

- The Sisters of Charity Foundation of Cleveland supports Catholic sisters and their ministries in northeast Ohio through the grantmaking, partnership, capacity-building, and evaluation efforts of its Catholic Sisters Program Area. The decline of sisters actively engaged in ministry, due both to their rising median age and a decades-long decline in their overall numbers, called for a reconsideration and likely revision of the CSPA existing theory of change.
- Unlike other strategic approaches at the foundation, such as ending homelessness or improving health equity, transitioning from sister-led to lay-led leadership of ministries remained largely unexplored: Basic research was lacking, and model practices were simply not available. Therefore, CSPA staff engaged in a disciplined process to explore, measure, evaluate, and enhance its approach to supporting the legacy and current requirements of Catholic sisters within a rapidly changing environment.
- This article presents findings and lessons learned from a three-part evaluation process designed to offer an inclusive, systems-based approach to evaluation by identifying outcomes critical to CSPA success and salient areas of evaluative inquiry designed to strengthen the program area: develop a framework of key elements of gospel-inspired service as modeled by sisters, rooted in stakeholder and community input; and employ the conceptual framework to develop measurement tools for sisters and lay partners for ongoing data collection to strengthen existing efforts and plan for the future.

*(continued on next page)*

### Key Points (continued)

- Learnings from the systems-based evaluation process suggest and will inform a revision of CSPA's theory of change, ensuring the foundation will continue to support and effectively promote the formation and activities of well-formed lay leaders and organizationally strong ministries to carry forward gospel-inspired service as modeled by sisters.
- This article concludes by discussing how this three-part evaluative approach contributes to an expanded understanding of how philanthropic strategic initiatives can be assessed and effectively adapted by foundations experiencing generational or leadership transition or other changing contexts. While the work developed from the specific context of a faith-based foundation, there are several tools and approaches that may be considered or adapted more broadly within philanthropy.

founding leaders (National Center for Family Philanthropy, 2017).

This article presents findings and lessons learned from this evaluation project. It describes the context of the foundation and of Catholic sisters in northeast Ohio, the design and methodology of the evaluation, and key findings. The article concludes with a discussion of how the foundation's evaluative approach may be more broadly applied to contexts of strategic shift and leadership or generational transition, particularly for social justice, family, or other foundations rooted in legacy, history, and tradition.

### The Sisters of Charity Foundation of Cleveland

The Sisters of Charity of St. Augustine, the first public health nurses in Cleveland, Ohio, founded the Saint Ann Foundation in 1974. It was the nation's first health care conversion foundation, and the first grantmaking foundation established by Roman Catholic sisters. The Sisters of Charity Foundation of Cleveland was founded in 1996, and in 2006 the two foundations merged with a single mission to improve the lives of

those most in need, with special attention to families, women, and children living in poverty. For more than two decades, the foundation has focused its work and investment strategies on issues of housing, health, and education inequities among Cleveland residents living in poverty, as well as sustaining the organization's Catholic sisters established to support these populations. As a Catholic philanthropy, the foundation remains grounded through its values embodied in Catholic social teaching and the deep commitment of staff and board that brings these values into action through service (Foundations and Donors Interested in Catholic Activities [FADICA], 2017).

For more than 160 years, Catholic sisters have served the most vulnerable in the greater Cleveland community through schools, hospitals, and other ministries of health care, education, and social service. As in many other communities across the United States, the sisters form a critical part of the community's capacity to identify and serve unmet needs. Their contributions continue through individual sisters still working in the community and the many organizations sisters have founded.

Recognizing the role of Catholic sisters in the social fabric and their unique way of being, ministering, and leading, the foundation has supported them throughout its history as change agents who have inspired and continue to work toward the foundation's mission of improving the lives of individuals living in poverty. The CSPA continually assesses and adapts its approach to community contexts. Its strategic efforts have varied to include supporting direct service work of sisters, increasing awareness of their example of servant leadership, promoting collaboration among congregations of women religious, building capacity of sister-led/sister-founded ministries, and fostering relationships between sisters and lay partners.

The landscape of Catholic sisters and their ministries has experienced radical change in recent decades, as sisters age and retire from active ministry and leadership positions (Center for Religion and Civic Culture, 2017; Fischer

& Bai, 2018). Congregations of sisters in the United States report an average median age of 79 among their members, and about three-quarters of congregations have no new members entering their communities (Do & Gaunt, 2020). The demographics of sisters in northeast Ohio reflect this national context. Locally, over 75% of sisters active in ministry in 2016 anticipated retiring by 2022 (Fischer & Bai, 2018). Of the 10 local congregations with which the foundation primarily partners, three have fewer than 40 members and one came to completion in 2021.

A strength of CSPA has been its use of evaluation and research to understand the needs of sisters, their model of serving, and the populations they serve.<sup>1</sup> With this deep awareness of the critical moment for sisterhood and the urgent need to sustain the mission and values of the sisters (FADICA, 2017), in 2015 CSPA began exploring with local partners how to best support lay leaders to follow the model of Catholic sisters in service and ministry. While the subsequent evaluative process explored below occurred within the context of a faith-based foundation, the obligation to history, tradition, and legacy that informed each step of the project may be used as a lens for broader applications within similarly formed or organized philanthropies (Jagpal & Schlegel, 2015).

### **Generative Spirit Initiative**

A decade-long commitment to fostering collaboration among congregations of sisters to strengthen ministry and respond to the needs of the community evolved and expanded by 2015 to include collaboration with lay partners, particularly young adults. With support from the Conrad N. Hilton Foundation, the Generative Spirit Initiative launched to form the next generation of lay people who understand and follow the model of Catholic sisters to become leaders in service and ministry for our cities, country, and the world. Generative Spirit has offered programming, convenings, and networking to

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cultivate connection between Catholic sisters and lay partners, along with related evaluation and research. The initiative currently offers three programs:

- The Ministry Leadership Program is a unique, year-long opportunity for emerging leaders (ages 22–35) at sister-led or sister-founded schools and colleges throughout northeast Ohio. Through monthly workshops, participants focus on leadership, spirituality, and learning through intergenerational relationships.
- “Education, Reflection, Accountability, Action” (ERAA) is an intergenerational anti-racism initiative for white people of faith. The group met regularly for eight months for reflection and discussion. At the end of that time, small accountability groups formed and met informally to continue the group’s conversation and build community.
- Advent and Lent faith-sharing groups formed and met virtually in 2020 and 2021. During

<sup>1</sup> Research on understanding the work of women religious in northeast Ohio, including the unique approach of women religious to ministry and the opportunities for collaboration to continue this work, has been commissioned by the foundation since 2012. See the foundation’s website, at <https://socfcleveland.org/our-work/catholic-sisters>, for more information on this research and related publications.

the lockdowns and social isolation of the COVID-19 pandemic, these groups were designed for sisters and young adults to take time to pause and use scripture for personal reflection and collective prayer.

Originally, the foundation wanted to use what it learned from the initial years of the Generative Spirit Initiative, along with additional learnings from grantmaking, capacity building, and other tools used by CSPA staff, to inform a visioning process for the program area in 2020. However, staff and partners realized this collective work raised critical questions to be addressed before a visioning process could begin, particularly around the preparation of young adults to transition into ministry leadership roles.

Although some large Catholic organizations invest in leadership formation programming, mission integration efforts, and novel governance structures designed to help the diverse cadre of lay leaders sustain these ministries with fidelity to the intent of the founders/foundresses, smaller ministries do not. Individual sisters in ministry or those aligned with smaller Catholic organizations and ministries often lack sufficient financial, human, and governance resources, and therefore possess little infrastructure to guide the increasingly urgent transition from sister-led ministries to lay-led ministries.

Such organizations, as well as schools and organizations where sisters no longer have a presence, represent the majority of the foundation's ministry partners. Like its other program areas, such as ending homelessness or strengthening health outcomes for families, CSPA was facing a highly specific issue that required deep, contextualized knowledge of the stakeholders, challenges, and opportunities. However, unlike these other program areas, carrying forward gospel-inspired service is largely uncharted terrain with little research or literature in model

practices available and few peers or colleagues at similarly organized or operationalized foundations.

Repeated research into how foundations access and use knowledge demonstrates that peers and colleagues remain the most common and important primary source of information (Harder+Company Community Research & Edge Research, 2016; Engage R+D & Equal Measure, 2021), yet CSPA staff lacked an extensive network of peer organizations and colleagues locally or nationally with which to connect and share. The CSPA decided to invest in exploring and evaluating this unique model of sister service to strengthen the foundation's strategic approach in northeast Ohio as well as to share its understandings of the model with others experiencing this widely felt challenge across the country. The main source of information for this research was program area stakeholders and community members. In other words, those closest to and most impacted by the work were centered as a primary source of knowledge and insight about the key challenges facing the CSPA and how those challenges might go about being better understood and eventually addressed.

### **Evaluation of the Catholic Sisters Program Area**

The Sisters of Charity Foundation of Cleveland identified an evaluation partner that uses a systems-based approach that draws on the lived experience and expertise of those closest to the work being evaluated — often program staff, program participants, and members of the community directly impacted by the work (O'Connell et al., 2021). To fully understand the targeted program or initiative, including intent, anticipated outcomes and changes, strategies for achieving change, stakeholders, and participants, the evaluation partner used the Systems Evaluation Protocol (SEP), a

<sup>2</sup> In this context, a "program" means the array of activities, events, grantmaking, etc., undertaken to further goals identified by program area staff. In the Catholic Sisters Program Area, for example, convenings that cultivate relationships between sisters and lay people and are part of the overall thrust of the CSPA's desired outcomes and considered part of the "program." More formal, regular "programs," such as the Ministry Leadership Program, would also be considered part of the "program" for the purposes of pathway modeling.

**TABLE 1** Evaluating the Catholic Sisters Program Area: Implementation of the Systems Evaluation Protocol

Time	Methodology	Participants
<b>Phase I: Developing the Evaluation Plan</b>		
6 months	Pathway Modeling	Foundation staff & leadership
Evaluation questions identified: <ol style="list-style-type: none"> <li>1. What are the main elements of “gospel-inspired service as modeled by sisters” that the CSPA’s Generative Spirit Initiative aims to develop and sustain in lay participants?</li> <li>2. Is participation in Generative Spirit Initiative associated with an increase in participants’ capacity and commitment to carry forward the gospel-inspired work of sisters?</li> <li>3. What is the necessary infrastructure and support needed for individuals and organizations to sustainably carry forward gospel-inspired service as modeled by sisters in the future?</li> </ol>		
<b>Phase II: Exploring Evaluation Question No. 1</b>		
5 months	Concept Mapping	Foundation staff & leadership Sisters Young adults
<b>Phase III: Exploring Evaluation Question No. 2</b>		
4 months	Survey design Data collection & analysis	Sisters Young adults
<b>Future work: Exploring Evaluation Question No. 3</b>		

methodology originally developed by Cornell University’s Office for Research on Evaluation. Systems evaluation is an approach to conducting program<sup>2</sup> evaluation that considers the complex factors that are inherent within the larger “structure” or “system” within which the program is embedded. The SEP emphasizes partnership between the evaluation team and those engaged in the programmatic work, centering the lived experience of the practitioner and community as those with the most intimate and impactful understanding of how a particular program is functioning. Thus, the SEP invites deep reflection on the part of those engaged in program design and implementation as a foundational aspect; this reflection helps with identifying areas of evaluative inquiry, preparing to implement the findings, and crafting a road map for future evaluation efforts (Trochim et al., 2016).

Through this initial reflection process, CSPA staff and the evaluation team identified three goals for the evaluation project:

- Offer a comprehensive evaluative framework for the CSPA while building staff’s evaluative thinking capacity.
- Identify specific areas of evaluative inquiry within the CSPA.
- Develop and employ best-fit tools and measures to collect reliable, credible data to strengthen existing programs and plan for the future.

The project developed and was completed through an iterative process over 15 months beginning in July 2020. (See Table 1.) Thus, the overall approach was flexible, adaptive, rooted in partnership with CSPA staff and stakeholders, and was drawn from their need for clarity and the questions that emerged from Phase I of the process, described below.

### Phase I: The Systems Evaluation Protocol and Pathway Modeling

The first task was helping the CSPA staff and foundation leadership articulate their theory of

change through a process of pathway modeling. The SEP uses pathway modeling to establish a clear and detailed understanding of what the program is and how it works before implementing a program evaluation. Pathway modeling uncovers what program participants do or experience as part of the program, what kinds of early changes these activities lead to and what changes unfold later, and how the activities in the program create the process leading to expected impacts.

Many evaluation strategies involve developing a logic model, in which lists of program inputs, activities, and short-, mid-, and long-term outcomes (the anticipated changes) are laid out in columns. Logic models provide a great deal of information but are not able to present the reasoning about how change works — that is, how and why particular activities are believed to contribute to or cause the changes listed in the outcome columns. Those causal connections — which make up the theory of change for a program — explain how a program is believed to work and provide a foundation for devising an evaluation to investigate how well it is working, how to make it work better, or how to make it work in different circumstances. In addition to clarifying a group's theory of change, the pathway model itself begins to contribute to evaluative findings. It helps program staff and stakeholders visually see areas of bifurcation and where gaps may exist in the efficacy of their model while simultaneously surfacing buried assumptions that may benefit from being tested (Hargraves & Denning, 2018).

Over a period of several months, the CSPA staff worked with the evaluation partner to build a pathway model that surfaced a shared understanding of the program area's rationale and theory of change underlying the many activities that staff undertakes. The model produced shows the program staff's varied tools and approaches — convenings, grantmaking, program design, communications, partnerships, relationship building — and the hoped-for short-,

mid-, and long-term outcomes of those efforts. It also accounts for how separate activities, and the outcomes they help produce, accumulate to generate the CSPA's overall intended impact.

### Lessons Learned From Pathway Modeling

The CSPA pathway model contains several “strands” of distinct activities. Because the staff wanted to comprehensively examine how previous programs and activities gave rise to current focus areas, the scope of the pathway model is quite large, tracing the previous initiatives that have contributed to the CSPA current theory of change. (See Figure 1.)<sup>3</sup>

Strand One includes the top portion of the pathway model, which focuses on building ministerial capacity for sustainability, particularly for those ministries undergoing the transition to lay leadership. The theory of change posits that intercongregational collaboration, intergenerational collaboration, and nonprofit administration skill-building contribute to the hoped-for outcome of ministerial sustainability. Strand Two includes the bottom portion of the pathway model, which focuses on building intergenerational relationships between sisters and lay partners. There are several outcomes connected to this portion of the pathway model, with the development of an intergenerational community committed to and capable of sustaining the needed individual development to carry forward gospel-inspired ministry as a critical mid-term outcome.

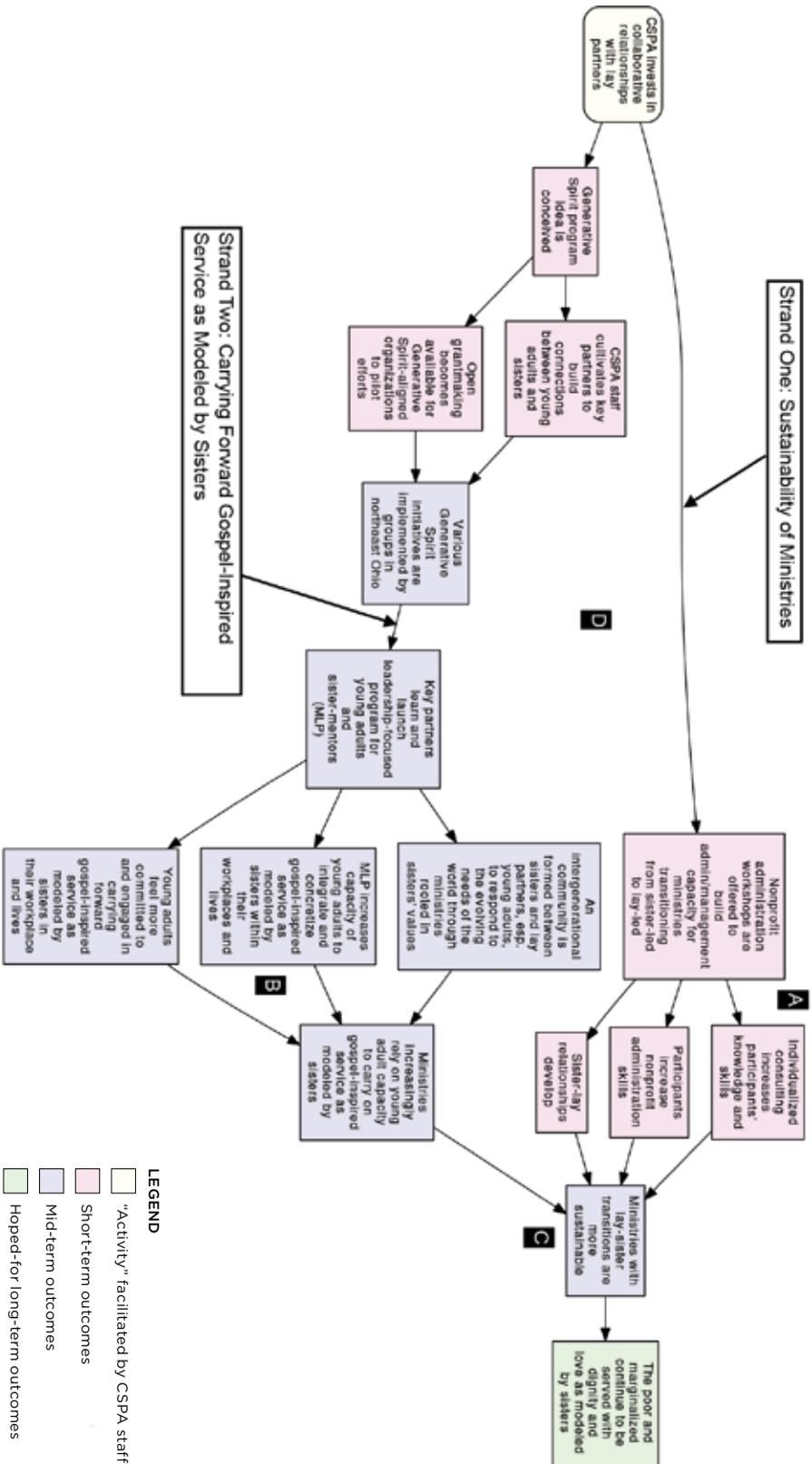
### Areas of Inquiry

As the CSPA staff engaged in a structured analysis of the pathway model, the following four areas of evaluative inquiry surfaced:

- First, the staff noticed that the ministerial sustainability strand needs intentional exploration of and further investment in targeted interventions to strengthen ministerial sustainability. While existing short-term capacity-building initiatives, such as nonprofit management professional development

<sup>3</sup>A description of the pathway modeling methodology and process and the complete pathway model may be found on the foundation's website, [https://socfcleveland.org/SOCF/media/SOCF-docs/Final-Report-Service-as-Modeled-by-Sisters\\_2021.pdf](https://socfcleveland.org/SOCF/media/SOCF-docs/Final-Report-Service-as-Modeled-by-Sisters_2021.pdf)

FIGURE 1 Catholic Sisters Program Area Pathway Model



programs, are a helpful start, the multifaceted challenge of ministerial sustainability requires a multifaceted solution with appropriate scope and sequence of interventions. (See Figure 1, section A.)

- Second, the staff realized that they need a clear understanding of what comprises “gospel-inspired service as modeled by sisters.” Although inspiring commitment to and cultivating lay leaders’ capacity to carry forward gospel-inspired service as modeled by sisters is a clear outcome within the lower strand, the staff needed conceptual clarity about what comprises that service to measure progress and effectiveness. (See Figure 1, section B.)
- Third, there was some question about the capacity of young adults to enhance the sustainability of ministries without additional support at and from their ministries. Exploration of this issue in Phase III of the project eventually underscored the difficulty young adults encounter upon applying and integrating their Generative Spirit experience into their ministries. This issue will be a major focus of future work. (See Figure 1, section C.)
- Finally, the staff noticed the bifurcation in the model, accurately reflecting the reality that the ministerial sustainability strand and the formation/community-building strands ran in parallel. (See Figure 1, section D.) However, the CSPA staff and stakeholders posit that those two strands need to be more intentionally woven together to reach the desired long-term outcome of sustainable, sister-founded ministries contributing to the foundation’s larger goals of improving the lives of people living in poverty. Both the appropriate infrastructure for sustainability and well-formed lay leaders capable of carrying forward gospel-inspired service are needed, ideally within the same organizations so that the synergistic effects of sustainable infrastructure and lay formation can be maximized.

### Evaluation Questions

From these areas of evaluative inquiry, three evaluation questions were identified:

1. What are the main elements of “gospel-inspired service as modeled by sisters” that the Catholic Sisters Program Area’s Generative Spirit Initiative aims to develop and sustain in lay participants?
2. Is participation in Generative Spirit Initiatives associated with an increase in participants’ capacity and commitment to carry forward the gospel-inspired work of sisters?
3. What is the necessary infrastructure and support needed for individuals and organizations to sustainably carry forward gospel-inspired service as modeled by sisters into the future?

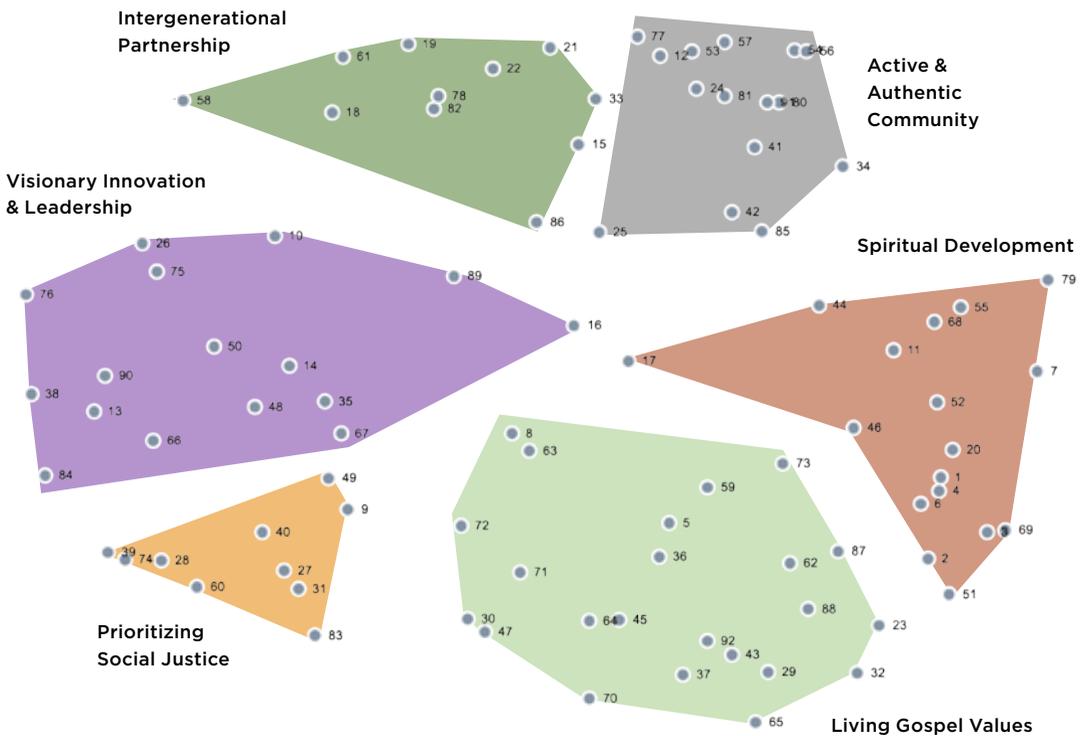
Within the scope of this 15-month evaluation project, the team prioritized the conceptual understanding of the specific elements of gospel-inspired service as modeled by sisters, with a particular emphasis on what would be needed for lay people to carry forward that work. The exploration of these questions continued with Phases II and III of the project.

### Phase II: Concept Mapping to Guide Program Development and Evaluation

Phase II addressed Evaluation Question No. 1 by developing a conceptual framework of the key elements of gospel-inspired service as modeled by sisters. Arriving at shared clarity about what comprises gospel-inspired service was a necessary precursor to further evaluation work. The evaluation team used concept mapping, an inclusive, community-centered methodology that invites stakeholders to describe their ideas on a topic of interest and represent these ideas visually in a map that can then be interpreted to generate useful, practical information to guide planning and evaluation (Trochim, 1989). A large stakeholder group brainstorms using a focus prompt to produce a set of statements relevant to the topic of interest and rates each statement on one or more scales — for example, importance and feasibility. A smaller working group then sorts these statements into groups based on their similarity to each other. The maps that result from the data analyses are then interpreted by stakeholders to guide their next steps in strategic planning, visioning,

**FIGURE 2** Concept Map: Elements of Gospel-Inspired Service as Modeled by Sisters

Each numbered point represents a brainstormed statement and its conceptual proximity to other brainstormed statements. Conceptually similar statements are close to one another; conceptually different statements are farther apart.



or evaluation development. The appeal of this methodology is its inclusive, democratic approach, which invites broad participation across many stakeholder groups while also leveraging statistical analysis to organize stakeholder-produced ideas in a way that is relevant, useful, and credible.

The CSPA staff and stakeholders were interested in better understanding what comprises gospel-inspired service as modeled by sisters to measure the effectiveness of the program area’s initiatives. Thus, after multiple pilot tests, the CSPA staff selected this focus prompt: “For lay people carrying forward the work of sisters, one specific element of Gospel-inspired service should be ....” Statements completing this prompt were produced by a large brainstorming

group of 94 sisters, young adults, and staff. The statements were numbered as they were created by participants to facilitate later data analysis. All numbered statements were then sorted by a group of 18 sisters and staff, who determined the degree to which each statement related conceptually to all the other statements. (See Table 2 on the pages 16 and 17.)

Multivariate statistical analysis was then used to produce conceptual clusters, where groups of statements that relate to each other are represented visually in a concept map. (See Figure 2.) Each numbered point on the map represents one of the brainstormed statements and its conceptual proximity to other brainstormed statements. Conceptually similar statements are close to one another on the map, while conceptually

**TABLE 2** Statements Contributed During the Concept-Mapping Process

<b>Spiritual Development</b>	
1	being open to transformative life experiences
2	being both courageous and humble
3	being both rooted and flexible
4	being both engaged and personally detached
6	being able to forgive ourselves and each other
7	being able to take the long view rooted in faith, hope, and community
11	investing in the inner lives of leaders who set the tone for the entities they lead
17	cultivating attention to vocation
20	practicing kindness
44	developing skills in compromise and dialogue to move gospel into ordinary life
46	elevating the joy of ministry
51	grounding the work in spirituality and prayer
52	practicing a sustainable rhythm of prayer, work, family, self-care
55	offering communal spiritual development for lay leaders
68	appreciating the charism of religious life
69	appreciating the meaning of one’s own baptism
79	taking an annual retreat in the charism of the order
<b>Living Gospel Values</b>	
5	being a source of leaven in society
8	measuring success by how faithful we are to our gifts, mission, relationships, and work
23	being rooted in Jesus’ teaching
29	integrating gospel wisdom, gospel values, and gospel living
30	developing an approach that integrates the inner life with outer work for justice and truth
32	cultivating a life of prayer and relationship with Jesus
36	meeting people where they are, without judgment
37	building discernment capacity to respond to a call to discipleship
43	yielding to the transformative power of the gospel
45	sharing God’s love to those in need
47	being willing to recognize and respond to spirit-inspired ideas, even if outside traditional, diocesan structures
59	listening with an open heart to all people to better discern the movement of the Holy Spirit
62	practicing humility
63	knowing that we cannot do everything to resolve issues of concern, but that we can do something and do it well
64	integrating action and reflection
65	praying, studying, and reflecting on Jesus in the gospels
70	articulating and embracing Catholic identity
71	honoring the essential dignity of all people, rooted in seeing everyone as children of God
72	remembering to be present to the person right in front of us while wanting to help as many people as possible
73	being grounded in servant-leadership
87	doing everything out of love
88	expressing and demonstrating faith
92	walking the talk through modeling Jesus’ value system in daily life
<b>Intergenerational Partnership</b>	
15	valuing intergenerational mutuality
18	collaborating, partnering, and networking with diverse groups to address needs
19	exposing young adults to the ministries and lives of sisters through internships; visiting sites where sisters are serving today
21	committing to partnership amid our differences
22	creating “communities of shared commitments” to address systemic divides and foster belonging
33	forming lay partners in the mission and charism of the sisters they represent
58	providing opportunities for young adults to seek and discern call

**TABLE 2** (continued)

61	hearing from young adults how they see the future, their role in ministry, and the support they need
78	developing foundational background knowledge of congregations and their ministries in Cleveland
82	developing background knowledge in the work that has been done by sisters/congregation
86	understanding that the sisters' way is gritty, in the trenches
<b>Active &amp; Authentic Community</b>	
12	building community as an antidote to individualism and isolation
24	amplifying impact through shared resources in faith-based community
25	offering vowed commitment to a way of being rather than a particular charism
34	being open to interfaith communities and activities to learn about other faiths
41	being supported by religious communities through prayer and consultation
42	being open to diversity and learning from others
53	living and working in community to model resource sharing and community care
54	building authentic, relational communities
56	building communities for individuals in ministry according to common spiritual desires
57	providing supportive community to share the joys and burdens of ministry work
77	building communities of service to the common good by joining different groups representing diverse cultures, backgrounds, social status, education, and leadership
80	ministering side-by-side with sisters
81	partnering with a sister to develop ministry ideas
85	understanding that the sisters' way also encompasses the tensions of life, including likes/dislikes, jealousy, favoritism, etc., that have affected religious life
91	developing friendships and sharing life experiences with the sisters
<b>Prioritizing Social Justice</b>	
9	focusing on the larger mission as the heart of the work rather than only smaller, easily measured tasks
27	linking justice and mercy
28	experiencing the lived reality of the poor
31	drawing upon liberation traditions
39	prioritizing those that are poor, vulnerable, marginalized, addicted
40	prioritizing mission over margin
49	finding the issue that moves your heart, learning about it, and acting on it
60	focusing on Catholic social teaching
74	committing to social justice
83	simply looking around and seeing who can be ministered to in the name of Jesus
<b>Visionary Innovation &amp; Leadership</b>	
10	adopting new organizational forms as needed
13	refusing to play into hierarchical structures built on wealth, power, prestige, clericalism
14	balancing continuity and innovation in a living tradition
16	cultivating the inner life of organizations to enable action in the world
26	partnering to address immediate needs, rooted in the gospel
35	thinking beyond our narrow cultural boundaries and viewpoints
38	developing a deep understanding of systemic racism
48	resourcing good, spirit-inspired ministry ideas when they arise
50	empowering and learning from those we "serve" to solve problems
66	being willing to stretch beyond the boundaries of being "law abiding" and status quo
67	being visionary and courageous, and responding to the signs of the times
75	following best practices for leading and structuring organizations out of gospel values
76	providing just wages, health insurance, and administrative support for emerging leaders
84	advocacy
89	thinking critically and challenging others, including sisters, when needed
90	having courage, persistence, and knowledge to deal with church hierarchy that may feel threatened by lay contributions

different statements are further away from each other. The small working group of sisters and staff ultimately selected a six-cluster model where each colored cluster of the map represents one feature of the “conceptual terrain” of what is needed for lay people to carry forward the gospel-inspired work of sisters.<sup>4</sup> Each of these statements was also rated for importance by the brainstorming group.

The evaluation team led the small working group of sisters and staff through a collaborative discussion process to identify and name the conceptual thread that linked the statements in each cluster. From this discussion, the elements of gospel-inspired service were identified as:

- Intergenerational Partnership
- Active and Authentic Community
- Spiritual Development
- Living Gospel Values
- Prioritizing Social Justice
- Visionary Innovation & Leadership

Each cluster on the CSPA concept map is composed of multiple, conceptually related statements. For example, the Spiritual Development cluster includes items such as “grounding the work in spirituality and prayer” and “being open to transformative life experiences.” The Living Gospel Values cluster includes items such as “honoring the essential dignity of all people” and “modeling Jesus’ value system in everyday life.” Within Visionary Innovation & Leadership we find items such as “empowering and learning from those we ‘serve’ to solve problems” and “being visionary, courageous, and responding to the signs of the times.”

The development of the concept map provided a conceptual breakthrough for the CSPA staff

and stakeholders as they achieved clarity and specificity about the intended outcomes of the program area, specifically the Generative Spirit Initiative. More importantly, there was a strong feeling of collective ownership, as the six clusters on the map were synthesized and named by sisters themselves. With a shared understanding and model derived from their personal knowledge and multivariate statistical analysis, the CSPA now had clearly defined terrain, priorities, and an understanding of the subparts of gospel-inspired service that need to be cultivated for them to effectively reach their desired outcomes.

### Phase III: Survey Development Based on Concept-Mapping Results

In Phase III, the evaluation team drew upon both the pathway model and the concept map to address how participation in CSPA initiatives increased capacity and commitment to carry forward the gospel-inspired work of sisters (evaluation question No. 2). Two separate surveys for young adults and sisters participating in Generative Spirit programming from 2018–2021 were developed. Both the pathway model’s articulation of expected changes and the concept map’s clear depiction of desired areas of growth informed the development of the survey. For example, the items with the highest importance rating from each cluster of the concept map comprised much of the survey content. The survey used a retrospective, pre–post format with both quantitative and qualitative items. Through the survey data, the team hoped to learn the perceived growth and/or barriers to growth for program participants as well as which programs resulted in the greatest change for participants.

While both sisters and lay people showed significant growth in nearly all items measured in the survey, there were important variabilities between these two groups. The following themes surfaced:

<sup>4</sup> For a detailed explanation of the concept-mapping methodology and process, including how the clusters are mathematically derived, as well as additional tools and analyses, see the full evaluation report on the foundation’s website, [https://socfcleveland.org/SOCF/media/SOCF-docs/Final-Report-Service-as-Modeled-by-Sisters\\_2021.pdf](https://socfcleveland.org/SOCF/media/SOCF-docs/Final-Report-Service-as-Modeled-by-Sisters_2021.pdf)

- Sisters' perception of their growth from before and after their participation in Generative Spirit was consistent across the elements surveyed, with a 37% mean percentage increase before and after. Sisters reported the greatest growth in feeling connected to an intergenerational community committed to carrying forward gospel-inspired service; understanding the perspective and challenges of lay partners; and their effectiveness as mentors for lay people.
- Lay participants reported more variable overall growth, with a mean percentage increase of 18% before and after Generative Spirit participation. Lay participants reported the greatest growth in developing a close relationship with a sister; challenging others to think critically about the status quo; feeling committed to carrying forward gospel-inspired service; and building sustainable spiritual practices.
- Lay participants reported the least growth in applying and integrating the core values of the gospel into their daily work at the ministries where they were employed. Qualitative responses from the survey indicated this was primarily due to a lack of supportive, intentional infrastructure within the workplace and demands on time from other personal and professional responsibilities. This lack of synergy between young adults and the supportive contexts they needed served as a key insight for the evaluation team.<sup>5</sup>

### Evaluation Project Learnings

The lack of synergy revealed by young adults in the surveys created deeper understanding of the four issues raised during the pathway modeling in Phase I (see Figure 1). CSPA staff and stakeholders now had a tangible understanding of gospel-inspired service along with qualitative data from young adults describing the realities and challenges of carrying forward this work.

The evaluation team highlighted three main areas of learning from this project, providing CSPA staff with a road map for continued exploration of what is needed to support and sustain emergent religious life.

- *Program:* Strengthen lay formation programmatic offerings, such as Generative Spirit, that clearly advance outcomes articulated in the concept map. Craft the experiences to support participants' meaningful growth in the six major areas identified, and focus future evaluation efforts on participant growth or change within those elements.
- *People:* Consider expanding the target participant group for lay formation to include those older lay people (ages 30–45) who are developmentally more ready and logistically more available for the advanced work of articulation, application, and integration of the key principles of gospel-inspired service as modeled by sisters. Younger adults seem to face substantial barriers that other age groups likely do not experience to the same degree. In future evaluation, parse the sample by age to test the hypothesis that older participants may have more success with application and integration of key elements of gospel-inspired service.
- *Processes:* Consider a serious exploration of evaluation question No. 3, or the necessary infrastructure and support needed for lay people and organizations to sustainably carry forward gospel-inspired service as modeled by sisters. Both well-formed lay people and organizational infrastructure are needed to enable the full success and potential of lay leadership in sustaining ministries as new models of religious life and lay partnerships emerge. This is uncharted and vital work, and requires a deeper exploration that is beyond the scope of this initial evaluation project.

<sup>5</sup> This lack of support and synergy should be understood within larger economic questions raised by the low wage and benefit structures within the nonprofit workforce compared to the extensive support system for life's basic needs accessible to Catholic sisters. Young adults participating in the Generative Spirit Initiative shared this as a main barrier to pursuing in careers in ministry during internal program evaluations in 2017 and 2018. This understanding contributed to the design of the evaluation project described in this article and represents a key area for further research.

## Conclusion

Because this evaluation project was iterative over 15 months, CSPA staff and stakeholders were able to make informed decisions and adjustments about the foundation's programmatic and grantmaking strategies to support Catholic sisters at multiple points during and after the project.

Perhaps more importantly for the ideas explored in this article, CSPA staff now have better understanding and tools to guide strategy decisions. The complete pathway model created in Phase I and the concept map created in Phase II provide thorough and solid tools for reference and internal CSPA planning. Sharing evaluation results at different stages of the process with the CSPA community and other interested stakeholders created new connections and inspired different conversations about what was possible in this critical moment for sisterhood. This engagement and relationship building around what was being learned contributes to the collective desire to intentionally consider the necessary infrastructure and support needed for people and organizations to sustainably carry forward gospel-inspired service (evaluation question No. 3). The depth and breadth of this question was fully understood toward the end of the evaluation project, and the team recognized that it would require resources beyond the scope of the original project. Creating and resourcing a project to explore and understand this evaluation question is a strategic priority of both CSPA and foundation evaluation and learning staff.

In addition to these strategy implications, the evaluation project presents implications for strategic learning at the foundation. While foundations most often learn from peers, especially those further along in the practice (Engage R+D & Equal Measure, 2021), here the foundation learned with community (Grantmakers for Effective Organizations, 2019). While existing research and evidence-based tools and models can provide road maps, reliance on these tools alone contributes to power imbalances (Lynn et al., 2021) and the bias that philanthropic strategies unfold in linear ways within fixed contexts (Patrizi et al., 2013).

Within the evolving context of this critical moment for Catholic sisters, CSPA staff found tremendous value in learning from and with other critical knowledge sources, particularly grantee and community peers. This community, of lived-experience experts, the sisters, and young adults living through the shifts within ministry, formed a solid knowledge ecosystem that catalyzed learning and reflection across CSPA's larger network of staff, board, and wider community. Co-creating knowledge with these lived-experience experts resulted in conceptual clarity around gospel-inspired service, a concept that had previously seemed intangible. Arriving collectively at this clarity invigorated staff and sisters at a moment of uncertainty. At times, the depth of this evaluation process was time consuming and challenging, but the usefulness and actionability of the resulting understandings provide long-term benefits that are worth the investment. Moreover, the distinctiveness of this context required this deep level of co-creation. It provided the deep, contextualized understanding that was difficult to find through other knowledge sources (Engage R+D & Equal Measure, 2021).

## Discussion

This evaluation process provided multiple opportunities for CSPA staff and stakeholders to explore, evaluate, and learn about and from the unique ways the sister model of service contributes to community. While the work developed from the specific context of a faith-based foundation, there are several tools and approaches that may be considered or adapted more broadly within philanthropy.

First, the pathway modeling approach ensured the evaluation questions were grounded in what had been done and how CSPA's approaches, strategies, and activities were carried out. This intentional, collaborative exploration facilitated shared understanding of strengths, gaps, and assumptions that resulted in strong evaluation questions to guide the remaining phases of the project. Using this approach would be appropriate for foundations seeking to understand strengths and gaps of existing strategies or better articulation of emerging program

theory within developing portfolios or areas of focus. Because the pathway modeling approach provides clarity on what happens as well as reasoning on how change works — or how and why particular activities are believed to contribute to growth toward outcomes — building a pathway model also may be appropriate for complex social-change efforts unfolding at many levels with a range of partners or stakeholders. In these contexts, logic models alone may not allow adequate exploration of relationships, programmatic shifts, buried assumptions, and other elements that collectively contribute to expected impacts.

Next, the concept-mapping approach ensured a tangible model grounded in the values and intent of the sisters. The six elements of the model provide a clear articulation of how the sisters envision their legacy to be carried forward by demonstrating how these core values have shaped and must be foundational to continued service to the community (FADICA, 2017).

Using the concept-mapping approach may be particularly useful for family foundations or donor-advised funds sharing a similar deep commitment to the legacy, history, or tradition of the founders. Development of a concept map may facilitate shared understanding across family members or generations of what elements of mission and service are integral to the family's philanthropic legacy as well as what inspires and motivates each of them to make a difference. Such an approach grounded in uncovering commonalities may become an appropriate tool to navigate the opportunities and challenges of transition inherent in family foundations.

The concept-mapping approach also may be applied more broadly to contexts where there is little existing research or literature on model practices available, as was the case with the foundation's Catholic Sisters Program Area. The process invites group description of a topic of interest and leads participants through a process to identify elements most important to the topic. By encouraging multiple perspectives and working toward consensus regarding the relative importance of different elements, the process results

*This collaborative approach represents the type of shift in evaluation and evaluative thinking that is urgently needed throughout philanthropy. Grounding efforts in community with people and organizations working together to identify the desired change and the pathways needed to achieve this change applies to most social-change contexts.*

in a visual tool that can then be interpreted for program design and implementation, evaluation, or other purposes. The development of such a tool thus becomes invaluable to situations with little existing information or where conceptual clarity is needed around the new or intangible.

Finally, the foundation chose an evaluation partner committed to partnership and adaptive, participatory approaches that drew primarily from the experiences of program area staff and stakeholders. This intentionality and the subsequent methods used resulted in a comprehensive yet flexible framework for the CSPA that identifies specific areas of evaluative inquiry to explore as the external context of the work continues to evolve. Fidelity to this type of evaluative process — grounded in co-creation with those experiencing and doing the work — ensures that CSPA staff have access to understandings and tools that will facilitate iteration and continued learning.

This collaborative approach represents the type of shift in evaluation and evaluative thinking that is urgently needed throughout philanthropy. Grounding efforts in community with

people and organizations working together to identify the desired change and the pathways needed to achieve this change applies to most social-change contexts. While the specific process described in this article is thorough and required significant foundation resources (e.g., staffing, financial, relationship), there are multiple stages of the process that may be adapted to fit available resources in other situations and communities. The careful attention to conceptual clarity at the beginning of the process, and the uncomfortable yet vital realization that foundation staff did not know what they did not know, created an openness that encouraged diverse stakeholders to engage with the work. Such vulnerability on the part of foundations will result in the shifts in power and agency needed for deep social change.

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