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Experts focus on lay boards' emerging role in Catholic education

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Jesuit Fr. Stephen Katsouros, director of the Institute for Catholic Educational Leadership

SAN FRANCISCO -- As religious communities in the U.S. and Canada hand over to lay boards the leadership of their Catholic schools, these boards are being called to exercise far more than traditional fiduciary responsibilities. They are now key planners for an educational future that remains faithful to a school's primary mission while adapting to the needs of 21st-century students.

That was the message delivered by several keynote speakers at the inaugural conference on trustee leadership sponsored by the University of San Francisco's Institute for Catholic Educational Leadership.

"We are putting our institutions in your hands," Vincentian Fr. Dennis Holtschneider, president of DePaul University in Chicago, told the trustees of more than two dozen secondary schools and colleges attending the conference July 19-22. "Watch over them, love them, and make sure they fulfill the aims for which they were founded."

To accomplish their emerging role as monitors of the mission, boards need to ask key questions that go beyond financial oversight, as important as economic health is to any school. Such questions, Holtschneider suggested, should include:

- Is the school's mission clear?
- Can people throughout the school (administration, faculty, students, support staff) articulate the mission and explain their role in its accomplishment?
- Is the work of the board in sync with that of the founding religious congregation and the local bishop? Are those relationships managed well?
- Does the school "budget for mission" or is there talk about its importance without giving significant resources to its accomplishment?
- Does the mission permeate the academic life of the school in ways that introduce students to life's great questions and the treasure of the church's thinking on such matters?

Jesuit Fr. Stephen Katsouros, director of the Institute for Catholic Educational Leadership, told *NCR* his

decision to offer a conference on board trusteeship is rooted in the Second Vatican Council's call for the laity to share their insights, training and expertise with institutions in the church. "We all exercise responsibility for building God's kingdom," he reminded conference participants.

San Francisco Auxiliary Bishop Robert McElroy, who opened the conference, urged trustees to fully embrace their new role and warned them to avoid five attitudes that militate against their effective leadership:

- Deferring the stewardship of mission to the school's administrators because they are full-time employees. Such an attitude, he said, can prevent the infusion of new ideas and constructive critiques.
- Seeing their trustee role as filling a specific niche (finance, marketing, communication) rather than recognizing that the responsibility for mission belongs to everyone on the board.
- Treating the mission as an artifact that ceases to be living and renewable. While acknowledging the inheritance of great traditions, the mission cannot remain rooted in the last century, he said.
- Using the mission as a surrogate for one's own agenda.
- Employing the mission as a kind of weapon against innovative decisions. In other words, saying, "The mission would not permit this," as a way to keep from considering or implementing new initiatives.

Barbara Taylor of the Association of Governing Boards praised Catholic school trustees, noting they "intuitively get the mission."

She encouraged trustees to create a climate where an open interchange can regularly occur between the board and the school's administration and where there is "sense-making before decision-making."

This, she said, requires boards to function in a "generative mode" that finds and frames issues and challenges in light of values and beliefs. Generative thinking, Taylor said, provides insight alongside fiscal oversight and strategic planning or foresight, a board's two other chief functions.

Also addressing what it means to be a mission-driven board, Patrick Bassett, president of the National Association of Independent Schools, said effective boards "shape and uphold the mission, articulate a compelling vision and ensure the congruence between decisions and core values."

He suggested a board meeting at which each member is given a deck of 52 cards with a separate value written on each. Each member selects their top 12 and joins in a conversation to determine what consensus they can derive around a common set of values.

To achieve a high-functioning board requires critical attention to board membership, added Geoff Boisi, former board chair at Boston College and founder of the National Leadership Roundtable on Church Membership. Besides geographic and professional diversity, he said, members should possess the "art of asking insightful questions," be able to get to the heart of an issue and be "crisp about it," and know how to prioritize ideas and move toward "practical wisdom."

Boisi also said that board members should be "compatible teammates who bring the best out of people."

Katsouros said the conference was an initial step toward making the institute a national center where board trustees can receive training and support to enhance their effectiveness. The institute will also collect research data about trends in board governance and provide benchmarking analysis for boards wanting to evaluate their competencies.

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