

### **Sponsorship Covenants and Mission Officers: A Case in Point**

During 2012-2013, the Board of Trustees of Alvernia University (PA) and the school's sponsoring religious congregation, the Bernardine Franciscan Sisters, took historic actions to strengthen an already strong relationship. They adopted both a first-ever Sponsorship Covenant and a revised set of Reserved Powers, the results of a three-year process of study, reflection, and dialogue by a Sponsorship Learning Community (SLC). At the same time, implementation began of a comprehensive mission education and integration program, drafted by a university-wide Franciscan Learning Community (FLC). Taken together, this work culminated a multi-year strategic focus on Alvernia's mission and identity, launched by the new president in 2006 and codified by the strategic plan (2007, 2012). It also serves as a case study of the pivotal and evolving role of the mission officer, the centrality of mission-centered presidential leadership, and the multiple partnerships necessary for a genuine institutional commitment to mission.

*Background and Context:* A Franciscan university of 3,000 students, designated by the Carnegie Foundation as a national model of community and civic engagement, Alvernia University was fortunate to have several beloved members of the religious congregation still visibly engaged on campus when the new president arrived in 2005. In addition to those serving as trustees or in part-time positions, a Franciscan sister served as Vice President for Mission and Ministry and as a member of the president's cabinet. Her major responsibilities were to supervise campus ministry, interview potential faculty and staff candidates, lead an annual Mission Day program, and promote appreciation for the mission, embodied in the motto—"To Learn To Love To Serve."

“Mission and Identity” discussions hosted by the new president revealed strong respect for the school’s Franciscan heritage and values, though most equated that identity solely with the “ministry of presence” by the Sisters and the campus’ devotion to community service. The widespread practice of the Mission Moment—a brief time of reflection at the opening of campus events, meetings, and classes—indicated a readiness for deeper learning about and reflection on the Franciscan, Catholic character of the institution.

New vision and mission statements, drafted to frame the 2007 strategic plan, articulated both the aspiration to be a “distinctive Franciscan university,” rooted in the Catholic and liberal arts traditions, and the commitment to Alvernia’s five Franciscan core values and the ideal, first expressed by St. Bonaventure, of “knowledge joined with love.”

While the plan’s five priorities and thirteen goals contained many of the educational and resource emphases found in similar plans, the first priority focused explicitly on becoming a mission-centered university with a far stronger commitment to Franciscan identity. As part of a comprehensive review of the role of the mission office, the president and the current mission vice president jointly agreed to reassign campus ministry to the University Life division to facilitate necessary collaborations with other dimensions of student life and to enhance mission education efforts. Subsequently, following an interim period and consultations with fellow presidents as well as campus and congregational leaders, the president redefined the nature of the mission officer position and created the cabinet-level position of Special Assistant to the President for Mission Integration and Education.

*The Franciscan Learning Community (FLC):* The most dramatic mission-centered initiative was the creation of a presidentially appointed Franciscan Learning Community (FLC). A collection of faculty, staff, student, and congregational leaders, it was charged to engage in a

two-year “process of discernment, planning, and action about mission and identity” that would lead to the “design of a robust program of mission education for the University community.” Led by the interim mission officer, a Mercy sister from the faculty with significant leadership experience, this learning community moved through a series of retreats, readings, study, discussion, and engagement with distinguished scholars. Members read and reflected on the Catholic and Franciscan intellectual traditions, the history and heritage of the Bernardine Franciscan Sisters, and the core values and principles of Alvernia University. This learning community became a “seed group” for expanding institutional understanding of the university’s identity and mission.

The 2010 final report of the FLC contained a lengthy statement of “shared understanding” about Alvernia’s Catholic Identity, the principles of Catholic Social Teaching, and Franciscan Identity, including the core values. It emphasized the need for greater intentionality regarding mission and proposed an action plan, organized around key recommendations. The document acknowledged the important role of lay women and men, from Catholic and other faith backgrounds, in ensuring a strong commitment to mission.

*The Sponsorship Learning Community (SLC):* Even as the FLC undertook its work, the Board of Trustees engaged in a multi-year series of educational plenary sessions exploring Catholic and Franciscan identity. Presentations by visiting scholars on *Ex Corde Ecclesiae*; the history and diversity of American Catholic higher education; Franciscan theology, spirituality, and education; and trends in sponsorship and in church-campus interactions provided helpful background, supplemented by readings. Yet with a Board diverse in religious backgrounds and with even Catholic trustees unfamiliar with canon law and the rationale and workings of the university’s two-tier governance system, a more systemic approach seemed advisable. Then too,

the dramatic demographic challenges facing Catholic religious congregations and the Vatican II call for lay-religious collaboration made it imperative that congregational and trustee leaders have deep shared understanding and commitment to the university. The exceptionally warm, collegial relationships among the congregational minister, board chair, and president also made the timing ideal for a creative initiative.

Proposed by the president, established jointly by the board chair and the congregational minister, the Sponsorship Learning Community (SLC) was launched in July 2010. The group brought together the five members of the congregational leadership team and five lay trustees and was chaired by a Franciscan Sister-Trustee who is also a respected university president. Initially the group was staffed by the president, with assistance from the interim mission officer.

Throughout its first year, the SLC met bi-monthly and learned together the components of sponsorship from various perspectives. Two canon lawyers provided historical perspective on the evolution of sponsorship over the last half century as well as an introduction to the key canons applicable to higher education. Members discussed the principles and application of *Ex Corde Ecclesiae* and learned about the history and current ministries of the sponsoring congregation. Trustees and congregational leaders shared expectations for themselves and each other. All reaffirmed the importance of and their appreciation for the sponsorship relationship.

At the end of the first year, with new congregational leaders due to be selected that summer, the SLC reported their upcoming agenda to the Board of Trustees:

- Continue to build collegial relationships among the new congregational leaders, the Board, and the President;
- Begin the groundwork for development of a “sponsorship agreement” and the review of the University’s By-Laws.

With new congregational leaders in place in October 2011 and the Special Assistant for Mission Integration and Education assuming office in January 2012, all agreed to begin work on a “sponsorship covenant,” with the aim of finishing the work of the SLC by June 2013.

The elongated schedule enabled a smooth transition—for the new mission officer, the congregational leaders, and the entire SLC. As a Franciscan scholar and a former member of both the congregational leadership team and the Board of Trustees, the Special Assistant was well suited to assume responsibility for implementing the recommendations of the FLC report and to develop mission integration plans for the various areas of the university. As staff to the Board’s Mission Committee, she was prepared to provide continuing education to those members and engage them in active oversight of mission-related initiatives. Most importantly, in the near term, she assumed responsibility for managing the complex processes needed to conceive and write a Sponsorship Covenant and to revise the “reserved powers” in the By-Laws.

The Sponsorship Covenant approved by the Board of Trustees in December 2012 could not have been envisioned when the SLC convened. It was intentionally designed to be a “relational” not legal document, one blending inspiration with pledges of commitment and accountability. Review of applicable resource materials and other comparable documents helped inform the shape and structure of the document around “mutual expectations.” Especially helpful was the sponsorship document from St. Catherine’s University in Minnesota.

Led by the Special Assistant for Mission, a core working group, consisting of the Congregational Minister, Chair of the Board of Trustees, University President, and the convener of the SLC, drafted a document. It was revised following feedback by the SLC and then reviewed by the Mission Committee of the Board and then the full Board, before being formally approved in December 2012.

Work reviewing the By-Laws involved the same working group, with involvement of the legal counsels for both the university and the congregation. The reserved powers were consolidated and updated. Following review by the members of the SLC, the revisions were approved by the Board of Trustees in June 2013.

*Lessons and Suggestions:*

Can this process be adapted by other institutions? Are there special insights from the Alvernia experience?

Mission Officers (and university presidents) know well the importance of collaboration and know too that differences in leadership style and pace must be respected. Presidents simultaneously lead, guide, serve, and facilitate the work of their governing boards; seldom do lay presidents have prior experience working with congregational leaders. Mission officers, perhaps more than any other cabinet members, are frequently asked to lead initiatives involving diverse individuals who do not report to them. Conversations about sponsorship are complex and multi-layered, involving legitimate concerns and worries as well as shared values and commitments. And all recognize the significant differences in the cultures of religious congregations, boards of trustees, and university communities.

Here's a short list of concluding suggestions, emanating from the Alvernia experience:

- *Build relationships first.* Without prior trust among the congregational minister, board chair, and president, the SLC could not have been created. Midway through the process, the decision to allow ample time for the new congregational leadership team to get to know trustees before beginning work was critical to the final results.

- *Form a learning community not a committee.* The SLC and FLC were successful because of their dedication to intensive study, reflection, and dialogue *before* any planning or reports were begun. Shared inquiry shaped shared commitments.
- *Nurture genuine working partnerships.* Whether board chair and president, president and congregational leader, or small working groups, work on sponsorship requires cultivation of multiple partnerships.
- *Recognize always that sponsorship is in essence about “right relationships” and shared values.* By-laws are important. Governance must be handled effectively and efficiently. But sponsorship is ultimately about high ideals, mutual trust, respectful partnerships, and passionate commitment to mission.
- *Articulate the complementary roles of president and mission officer.* No one except the president can be the **chief** mission officer, but a mission-centered president needs a strong, credible mission officer to ensure sustained progress . . . and results.

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