

LESSONS FROM TRUSTEE MISSION COMMITTEES FOR PJP's

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Good morning/afternoon. It's a pleasure to be with you. I'm very grateful for this convening on the topic of PJP's and the ways in which they are being used both to attach ministries to the Church and to assist in keeping those organizations vibrantly faithful to the religious purposes for which they were founded. My experience on this matter is almost entirely within the United States and I am particularly grateful therefore to spend time among all of you and learn from your experience.

I first learned of the use of PJP's to serve as a successor body for founding religious when I served as chair of the board of Ascension Health. Ascension is one of the largest of the Catholic health systems in the United States, with nearly 178,000 health care professionals working in 2600 sites of care and providing over 20 million patient encounters annually.¹ It began as a merger of the Daughters of Charity Health System with that of the Sisters of St. Joseph of Carondelet, the sisters of St. Joseph of Nazareth, the Alexian Brothers, and the Sisters of the Sorrowful Mother. At first, the leadership team of the various sponsoring organizations worked in tandem to sponsor the new entity as a whole, but that proved unwieldy. In 2011, the Holy See approved creation of a non-congregational public juridic person to serve as the sole Sponsor. Rather than preserve the cultures of the individual founding communities, the health system would be asked to create a culture than continues the healing ministry of Christ.

More recently, I've led the process of creating the petition for a new PJP that would watch over the combined educational works of the Congregation of the Mission (the priests and brothers community established by St. Vincent de Paul) and the Sisters of Charity founded in the United States by St. Elizabeth Ann Seton and who look to St. Vincent to ground their spirituality. I am also advising the Sisters of Mercy as they consider doing the same for their very large assemblage of schools and universities. The intention here is to see that the Setonian/Vincentian and Mercy missions and spiritualities are preserved within the educational ministries.

It's been an interesting journey to watch how these structures work in practice for Catholic education and Catholic healthcare. My own training is in university administration and governance. I am not a canon lawyer, and so I rely on canon lawyers to assist and advise any projects. Frs. Bob Kennedy and Frank Morrissey, who had such rich understandings of the ways these canonical structures could support pastoral ministries, were particularly helpful in educating me on these matters.

Today, however, I'd like to tell you about another structure that has arisen in the United States to help these ministries remain faithful to their religious purposes over time, namely Mission

¹ <https://about.ascension.org/news/2024/07/embracing-change-ascension-evolving-to-meet-the-needs-of-our-communities>. <https://about.ascension.org/about-us/history-sponsorship>.

Committees within the boards of trustees. Their experience offers good lessons and cautionary notes as PJP's assume a similar watchfulness over the Catholic ministries.

The Rise of Mission Committees and their Charge

Mission committees are being established in the United States in a time when founding religious congregations are aging and diminishing in numbers.² Chief mission officers, vice presidents of mission, mission directors and other positions have been developed within the university so that a single person is directly responsible that the mission remains vital and well managed within the organization. Mission audits and evaluation tools have been developed by sponsoring congregations as a method to periodically requiring a university to assess, report, and plan for improvements on its mission activities. Mission committees of the boards are arising at the same time, and for the same purpose, so that Catholic universities will have ways to replace the accountability, the assessment, and the leadership once provided by the founding congregations. What's important to understand is that they are a part of the universities' boards of trustees.

In the United States, non-profit organizations are overseen by boards of trustees. These boards consist of unpaid volunteers, recruited for their love of the organization, their expertise in a field that is useful to the organization, and often for their ability to help the organization secure donations. Though not part of government, they are erected under civil law with a government mandate, namely to watch over the long-term financial sustainability of the organization, its faithfulness to its non-profit purpose, its operational effectiveness and to ensure that the students are well served. To accomplish those ends, trustees have many powers, including appointing and overseeing the president's work, as well as setting and monitoring the organization's strategy and major goals. The Catholic church also has expectations of these boards, which regularly coordinate governance decisions with local bishops or founding religious congregations.³

Because of the broad range of their oversight responsibilities, boards of trustees establish subsidiary committees. Most often these include such committees as Finance, Investment, Academic Affairs, Student Affairs, Athletics, Philanthropy, and Audit. These committees are expected to provide closer inspection over particular aspects of the university's function on behalf of the larger board. Often, a board will recruit members who have the expertise to knowledgeably do this work. These committees, then, in turn, report their findings back to the full board.

Increasingly, Catholic universities have been adding a committee generally known as the Mission Committee.⁴ The purpose is to enable the full board to watch over the organization's religious character, purposes and mission and assure itself that the activities are fully accomplishing those goals.

² Relationship Revisited: Catholic Institutions and Their Founding Congregations. Occasional Papers 47, (2000). Washington DC: Association of Governing Boards. Written with Melanie M. Morey, Ed.D. [Reprinted in Current Issues in Catholic Higher Education, Fall 2000.]

³ Ex Corde Ecclesiae, General Norms, Article 4.

⁴ Holtschneider, Dennis. (2015). The Mission Committee. Association of Governing Boards: Washington DC. https://agb.org/wp-content/uploads/2019/01/agb_mission_committee_2015.pdf

More specifically, they are being charged to watch over (1) the precision and aptness with which the organization defines its mission goals; (2) whether the goals are sufficiently funded and staffed in order to be achieved; (3) the extent to which the organization successfully fulfills key aspects of its faith-based mission; and (4) the vibrancy of the faith-based institutional cultures of the organization.

The Usefulness of Mission Committees

There are several advantages to creating a mission committee.

Boards of trustees have great weight in the United States. The entire organization knows that they have the final decision-making power on major matters, and that the president reports to them. When they take an interest in a matter and set expectations and goals, the organization is expected to take that most seriously. Historically, the sisters and priests enjoyed a similar respect when matters of mission were raised by them, but as their numbers have lessened or entirely disappeared from campus, it helps to have the trustees begin to take an interest and some measure of leadership in this regard.

Even the board needs some push to attend to these matters, however. Often, the board's attention is focused on weighty and immediate challenges. This Spring of 2025, for instance, most university boards in the United States are focused on the quixotic and damaging actions taken by President Trump and the Congress. The loss of funding for the poor, the loss of funding for research, the potential loss of work-study arrangements, the directives to change curricula and get rid of our initiatives to educate immigrants, and the chaos stemming from the disassembling of the federal Department of Education, have all focused our boards attention on the financial viability and sustainability of our universities. Questions of Catholic mission and identity understandably have been set aside. The present drama aside, this dynamic is almost always the case. There are always immediate challenges that require the board's attention, pushing "important, but not immediate" matters for future meetings. By establishing a mission committee, the boards of trustees are able to make certain that some portion of the board members continue to actively watch over the religious character and work of the organization in a steady, constant manner.

No matter the strength and effectiveness of a PJP, the trustees will always be a needed partner in achieving the ends of the organization. Trustees approve an organization's strategic plans; raise and allocate donations; approve annual budgets determining what gets funding and what does not; conduct the search for the president and hold the president accountable for accomplishing annual goals. A mission committee assures the board's active attention at every meeting.

Mission Committees' Challenges

Mission committees are new structures and still finding their way toward "best practices." They are also prone to the predictable weaknesses of any board committee.

As mission committees first began to be appointed, members were often appointed from among the religious themselves. So, too, the chairs of the committees. That made sense, since the religious knew the tradition better than any. Minimally, the religious had undertaken at least a years' worth of study during their novitiate, and they had continued to read, pray, meditate and absorb the spirituality all their lives. Franciscan sisters generally knew more about Francis and Clare than any of the laity on the board. Jesuits understood Ignatian discernment, concepts like Magis, and practices like the Examen.

The problem was that boards were not commonly recruiting laity who knew these traditions, nor were they thinking about the day when religious could no longer populate and or lead these committees. Nor were they shifting the organization's expectation and culture that laity could lead the university's charism. Today, many mission committees are composed of a majority of laity because religious are no longer able to serve, and those laity are not entirely certain of the degree to which they can assert leadership on these matters, or how to go about it. This leaves them somewhat vulnerable to passively accepting whatever agenda is proposed by the university's leadership, if any. A board's finance committee knows exactly its power, role and agenda. That is less so, as laity timidly step into the leadership of mission committees.

Absent strong leadership among their own membership, many of these committees have fallen victim to a common weakness of many board committees, namely they permit the organization to fill the meetings with reports by various employees of the organization, and at times even students – testifying to the extent of the organization's work on behalf of mission. Campus ministry student leaders might report on recent retreat experiences. Dormitory leaders receiving a campus ministry stipend might report on the voluntary activities they created in the precious year. Mission officers might report on how many new employees were told of the mission during their orientation, or ways in which more advanced mission-based training is being offered to a core few of employees.

Not infrequently, these are inspirational moments, but trustees are often left wondering how important or extensive their role is. They generally spend the time listening and affirming, but not setting agendas, goals, or determining if sufficient resources have been brought to bear to achieve the goals. They review activities which only seem to touch a few core students or employees and are not encouraged even to ask critical questions of these. Rarely do trustees ask questions about the theological education a student should be receiving. Nor do they discuss how the required philosophy courses assist undergraduates to ask life's biggest questions, to learn the largest most compelling answers to those questions over time, and to think about how questions of religious conviction play into philosophical education. Rarely do mission committees ask how an organization measures whether students in the nursing program learn a caring bedside manner or are prepared to discuss questions around end-of-life with their patients. Or whether than computing program has a rigorous ethics content in its curriculum. Or review the ethical standards for research, or mission-based policies on what speakers might be excluded from campus, or how honorary degrees recipients are to be chosen. Too often mission committees stray into the realm of operational oversight, perhaps even the evaluation function of management, rather than tackling strategic matters that are appropriate to the board's true function.

None of these are easy matters. The leadership of a university may worry that a part-time volunteer board may not have the expertise to engage them well, or that they may drift into faculty prerogatives. And yet it is precisely the role of a board of trustees to satisfy itself that the organization is indeed smartly engaging the largest, most important questions of its faith-based mission, and then setting in place the programs, staffing and resources necessary to achieve them.

It's also a delicate matter for a mission committee to wade into topics that might just as easily belong in the academic affairs committee or the student affairs committee. Board committees, like universities themselves, can be territorial and fiercely protective of their silos. At times, mission committees invite the respective vice presidents of those university sectors to join them for conversations, but their authority is tenuous at best when, for example, they ask a provost about hiring faculty for mission purposes, funding ethics in the various professional schools, or evaluating student learning outcomes related to faith and social commitment. At times, the mission committee may invite a combined meeting of the academic affairs and mission committee, so that such matters can be discussed together. But such attempts to insert the mission committee into the long-recognized sphere of other committees can be awkward and challenging. More often, such uncertainties are avoided and the mission committee simply watches over the work of the chief mission officer and whomever leads campus ministry. This seriously limits the purposes for which the mission committee was erected.

Data is not often brought to bear on matters of mission either, though it can be of useful benefit. Surveys can be conducted of students' change of attitudes toward faith during their college years, for example, surveys that are freely available from national associations such as the ACCU. Unfortunately, university leaders at times focus committee members' attention on matters that reflect well on the organization, rather than discussing the areas in which they do not achieve larger goals.

It's not a simple or easy process to introduce students to faith in the context of a university, and universities are understandably reticent to set goals in this regard, much less encourage board committees to discuss such matters. When mission committees are composed of laity without strong experience in academic culture, the particular charism, or the curricular matters that are generally the province of faculty decision-making, university leaders can actually fear that an uninformed board might recommend goals or practices that would be difficult to institute, hard to achieve, or which are simply naïve. It is easier for administrators to set the meeting agendas themselves, avoid such topics altogether, or fill the meeting minutes with presentations on the topic without allowing it to then move toward board-recommended actions.

An added complication is that mission committees can find themselves as divided by the issues of the days as are the church and society at large. Debates over LGTBQ policies, fertility benefits, and enrolling students without citizenship status can divide mission committees at the very moment they are trying to give some guidance to the university as a whole.

This plays out in a larger way when the very object of the university's mission is considered. Some Catholic universities recruit students who are strong in their faith and then attempt to inform that faith further. Most Catholic universities in the United States have larger purpose of

educating the poor and populations for whom a college education is not easily available. Others accept the challenge of recruiting and educating young Catholics for whom faith is at best a question, if not simply a cultural identifier. In the latter cases, these universities educate broad swaths of the population, in the process recruiting students of many faiths or from families where faith was not practiced. One hears challenges that a university might be more “Catholic” if it became more like those colleges that recruit active Catholics from the start. As with any successful relationship, the committee must learn how to discuss these matters candidly and with all the humility due any search for truth.

High-Functioning Mission Committees⁵

PJP’s share important similarities to mission committees in that they watch over and satisfy themselves that the university is successfully creating a Catholic culture within the organization, achieving its charism-based social purposes, and effectively informing and forming students in ways that are consonant with the ideals of a Catholic higher education. They also have certain advantages over mission committees. They are more often composed of members, both religious and lay, who are indeed experts in the charism, and knowledgeable about the running of an educational enterprise. They have clear authority to watch over all aspects of the university as it achieves its faith-based purpose. It is also the president whose leadership has their most direct attention, encouraging the president to take these matters seriously.

Like mission committees, PJP’s rely almost entirely on the data given to them by university leadership, without having personal access to the students or employees to easily question what they are being told. They benefit therefore from excellent data, tracking not whether a few students benefit from specific initiatives, but the extent to which all students benefit. They benefit too from knowledgeable leadership, people who are confident in asking insightful questions and seeking well-grounded and fulsome answers.

Their discussions are wide-ranging and connected to the elements that matter most when it comes to creating a strong charism-based culture in a complex organization. Their considerations are strategic rather than operational, and include whether the appropriate resources are being brought to bear for these initiatives, whether, for instance, excellent faculty are being hired to teach the courses that are critical to its outcomes. They can consider if the strategic plan prioritizes these goals, whether the annual fund-raising and capital campaign are assembling funds so that these priorities are endowed and funded for all time, rather than subject to yearly budget constraints. They can ask to see the goals set for the president each year, to assure themselves that the board is joining them in making the Catholic and charism-based cultures and mission a priority for the president’s work and measured outcomes. They can do the same for the mission officer’s goals. They can track the full range of formation programming, from the messages conveyed and discussed on recruiting of new employees, to orientation at hiring, and ongoing formation throughout the arc of a person’s employment.

⁵ Best Practices of Board Mission Committees in Advancing the Religious Mission and Catholic Identity of Catholic Colleges and Universities. Susan Sweetland Gabert, (Dissertation,. Creighton University, 2017)

Mission Committees are effective when they feel independent, empowered, sufficiently expert and aware of best practices in the field. It matters then that they take their own ongoing education seriously. This includes more than learning the charism itself, or the expectations of Catholic higher education contained within church documents. This includes learning how corporate cultures are built and sustained and learning how cultures are measured and monitored over time. It includes a sense of the social doctrine of the Church and other bodies of theological and philosophical tradition that students might be exposed to over time. It includes learning about the development of doctrine and in fact, the ways in which society first hears new ideas, rejects and adopts them over time, and recognizing how the present intense debates of the church and society fit within that perennial pattern, so that no authority overreacts to which is a natural process. It means learning how faith is nurtured within the present rising generation, but also the full extent of a university's proper role within society.

Perhaps first and foremost, high functioning mission committees recruit members who are expert in the issues facing the committee. This can be done over time by proposing new trustees for membership on the larger board of trustees and then having them assigned to the mission committee. It can also be accomplished by adjusting the organization's bylaws to permit the appointment of non-trustees to the committee. Only with this kind of personnel can it truly function at a strategic level, serving both the entire board and the organization's leadership.

PJP's and Mission Committees

St. Augustine began his famous Confessions with regret that he learned Latin by reading the stories of the gods and their adventures. Those stories were thrilling to him as a youth but in all the wrong ways, quietly conveying ideas of sexual conquest, the glory of dominating an enemy, of might making right, and more. Looking back after his conversion, he wished for an education that would have led him on a less dissolute path in his early adulthood.

Questions of the kind of human beings we want our students to become are the conversations that both mission committees and PJP's have at their best. Whether a committee representing the trustees or a canonical body representing the Church, mission committees and PJP's are well suited to ask how higher education best forms people in the words of Pope Francis, for "the head, the heart and the hands." To do this, the committee or PJP must function well.

There are lessons from which PJP's can benefit in the early mistakes and best practices of mission committees. These include:

- Recruiting knowledgeable and experienced members and chairs.
- Putting the committee's charge into writing, so that its expanse and extent is agreed upon at the outset.
- Taking time to understand the institution's mission, in all its aspects, and then setting agenda around those matters.
- Placing agenda on a calendar so that it is addressed over time. Some matters deserve recurring attention and should be calendared accordingly.
- Seeking data to inform the matters under discussion, where appropriate.

- Seeing the organization is providing sufficient staffing and financial support to achieve the mission goals being set.
- Confirming that strategic plans and capital campaigns contain plans for strengthening and achieving mission-based goals.
- Seeing that the senior leadership team's annual goals contain the specific mission goals that are being set to be achieved that year, that they are held accountable for those items, and perhaps even rewarded accordingly where salary is tied to goal achievement.
- Evaluating the president and chief mission officer's performance in mission based upon present goals to which everyone has agreed in advance.
- Finding ways in which the committee's knowledge of the institutional culture can be measured and can also be ascertained independent of reports from senior leadership
- Having a broad conception of the content of committee education and formation and adding at least a small component to every meeting.
- Try to rise above the differences that divide the church and society in a way that allows fresh insight and a broader conception of the matters at hand.
- Working closely with the president and mission officer in advance so that difficult issues can be introduced and discussed well.
- Seeking and adopting best practices from other PJP's and mission committees.

There are almost certainly more lessons we will discuss together in this meeting. I thank you for simply welcoming the notion that the experiences of mission committees may be helpful to observe as PJP's go about their own work of watchfulness and accountability.

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