
ANNOTATION

Caretti, David Louis. "Ownership, Control, Sponsorship, and Trusteeship: Governance Relationships within Private Catholic Religious-Sponsored Secondary Schools in the United States." EdD dissertation, University of San Francisco, 2013. 327 pp.

No one familiar with, much less working in, Catholic education in the USA is unaware of the multitude and magnitude of the challenges facing this particular expression of the Church's teaching mission. From primary schools through universities, challenges abound: financial, enrollment, public relations, demographics, leadership, relationships (ecclesial, governmental, social, cultural), governance, its value proposition, and more. David Caretti has rendered a significant service to one substantial part of the Catholic educational community in his study of private Catholic secondary schools in the USA that are "sponsored" (a problematic and confusing term as it turns out) by religious congregations. Caretti's contribution is all the more meaningful and helpful in that he explores, and raises substantial questions about, four broad aspects of governance in such schools: ownership, control, sponsorship, and trusteeship (6-12).

While written more than a decade ago, the issues explored and the questions raised are all the more urgent given the many challenges facing religious-sponsored schools today, not least of all the significantly fewer religious congregations corporately and a decrease in their members' personal active engagement in "their own" schools on a day-to-day level as well as in terms of the exercise of governance. Indeed, not a small number of religious congregations have discerned and chosen a "path to completion" and are no longer accepting new members. Other congregations have decided to relinquish "ownership" or "sponsorship" of their schools in terms of both civil and canon law. Certainly since Vatican Council II, and well into the current moment, "the times they are a-changin'."

The purpose of this dissertation was "the exploration of existing governance relationships, specifically in the areas of Ownership, Control, Sponsorship, and Trusteeship, between religious congregations and boards of limited-jurisdiction at their local secondary educational institutions" (6). A focus-group methodology was used (108-111), consisting of six groups, three of which engaged the leadership of different religious congregations and three of which involved small groups of trustees from each of the three congregation's "sponsored" schools. Typical of phenomenologically based research, the researcher met with each focus group, recorded the conversation, transcribed each group meeting, and analyzed common themes, convergences, and divergences.

While there are several areas of agreement and common understanding among the three groups of congregational leaders, as well as members of the three distinct boards of trustees, it becomes clear early on that there are also substantial differences in understanding, interpretation, and perspective across the four major areas under exploration. Such differences are further amplified in each focus group's knowledge (or lack thereof) of both civil and canon law, two-tiered boards,

reserved powers, limited-jurisdiction boards, and other factors that impact and influence a school's governance structure and its exercise of authority. This dissertation certainly confirms F. G. Morrissey's statement quoted in this study (although written in reference to Catholic health care institutions) that in various and differing governance contexts and structures, "sponsorship [exists] with or without ownership; ownership with or without control, or very little control; and control with various forms of sponsorship" (4).

Among important topics raised, if not completely addressed or resolved (which was not the intent of this study), are the following: the rather distinct role of a religious congregation member who serves on the board of one of its schools as distinct from the role of the congregation as Member with reserved powers; the practical difference between, yet the inevitable and necessary functions of both, civil and canon law; the necessity of board, and often enough, religious congregational formation and education on the roles, functions, and authority of each; decisions about definitions and use of terms to employ (and not) in the context of board and congregational governance; the nature, definition, and function in canon law and Church practice of "public juridic persons" and the exercise of limited-jurisdiction governance; and the qualifications necessary to become a well-informed and knowledgeable board member as well as a/the legal (civilly and canonically) Member representative. In terms of the school's mission, who/what "owns" or "sponsors" it also needs to be addressed (perhaps not surprising, it seems easier to understand who/what "owns" the property, building, and physical assets than it does the "charism" or "sponsorship" of the institution).

Although this study was limited to three Catholic religious congregations and the representatives of the governing boards of three of their schools, the dissertation's findings and implications are likely relevant to all such similarly situated institutions. To this reviewer, the most significant contribution of this study is that it presents a clarion call for both religious congregational leaders and the institutions they have founded, govern, own, control, and/or sponsor to thoroughly and thoughtfully understand and agree on the meanings and implications of each of these terms from the dual perspectives of both civil and canon law.