



Carney  
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Reflections on  
**Catholic School**  
Leadership, Governance,  
and Strategy

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A monograph of collegial writings  
by **Bob Regan**

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# Carney, Sandoe & Associates and the Catholic Schools Practice

Carney, Sandoe & Associates is an educational recruitment, search, and strategic consulting firm that places teachers and administrators in private, independent, and like-kind (charter, magnet, pilot, and merit) schools worldwide. We have placed over 32,000 teachers and administrators in independent schools since 1977. CS&A works to fill thousands of teaching and administrative openings at hundreds of K-12 college preparatory schools each year.

A division of our Search Group, the Catholic Schools Practice works to help Catholic Schools identify and develop a new kind of entrepreneurial leadership that evaluates present conditions and future opportunities while remaining steadfast to each school’s individual mission and charism. Our team, comprised of former college and school administrators who personally and professionally understand the nuances, opportunities, and challenges inherent in Catholic Schools, aids schools in governing effectively so they can survive—and thrive—in a changing landscape.

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# INTRODUCTION

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I am delighted and honored to welcome you to this unique collection of reflections on Catholic school leadership, governance, and strategy. Most of the articles contained in this monograph were written as blog posts and were not only posted to CS&A's blog but distributed broadly to our Catholic school colleagues and clients across the country—and indeed throughout the globe—inviting them to share their thoughts and suggestions. The response has been enormously gratifying. Hundreds of individuals have engaged robustly and collegially in a virtual conversation bringing heightened awareness and appreciation to our Catholic schools and colleges. Some of these articles have also been included in the leadership curricula at Catholic colleges and universities, while others have been distributed to school trustees, staffs, and job candidates as required reading. One Board Chair recently contacted me to say that several articles were required reading of all trustees before a decision could be made regarding the future of the current president at the school. I trust my writings were a force for good!

All of these reflections are motivated by a singular desire to use our privileged platform and intellectual capital at Carney, Sandoe & Associates to assist Catholic schools in achieving their ambitions of delivering quality, belief-centered education to the children, families, and communities they serve. We are pleased to be partners in thought leadership and learning together with our wonderful client schools and candidates.

By way of background, Carney, Sandoe & Associates has been serving independent and Catholic schools with distinction since 1977. The dominant firm in the leadership search sector, we established our Catholic Schools Practice in 2012 in recognition of the unfortunate reality that many fine Catholic schools are increasingly at risk and require bold new leadership along with an enlightened, contemporary approach to gover-

nance. Several deeply held convictions drive our intentions and provide urgency and relevance to our practice:

- Catholic schools are essential to the communities they serve and are increasingly the educational institutions of choice for Catholic and non-Catholic families alike. The loss of a single Catholic school blows a hole in the community and removes a vital mission and set of core values that are likely never to be replicated. Catholic schools are not fungible entities. Their vulnerability raises the stakes for generations of children and families.
- Largely through no fault of their own, many Catholic schools find themselves at risk as intractable market and demographic forces threaten the very foundations on which they operate. The rapidly declining faith demographic in America is especially impactful and has forced the closure of many parishes and parish-based elementary schools, thereby eroding the feeder systems so critical to Catholic secondary schools. The broad pyramid of feeder schools that once provided structural assurance to the future of Catholic secondary schools has been reduced to a narrow silo—in some cases, a solitary referral partner, at best.
- Only 22% of Americans self-identify as Catholic today, and 1 in 8 Americans are “former Catholics.” Since most Catholic schools continue to require a practicing Catholic as head of school, there is a significant disconnect between supply and demand when it comes to identifying qualified candidates who are not only exceptional leaders but can also meet the faith standard. The search process must therefore be intensely focused and creative and requires a consulting partner totally immersed in this ever-diminishing sector of practicing Catholics. Our Catholic Schools Practice provides the necessary focus, capacity, and immersion required to deliver exceptional search outcomes for our client schools.
- As a result of these massive and disruptive market forces mentioned above, Catholic schools require a *new kind of entrepreneurial leadership* capable of converting threats into opportunities and raising the powerful value proposition of a Catholic education. Although passion for mission and Catholic identity remain essential components in the leadership profile, they are no longer sufficient to do the critical work of effective Catholic school leadership in these times. A fundamental, tectonic shift in leadership emphasis is required—from “operational management” to “strategic vision-setting;” from intake to outreach behaviors; from fundraising narrowly defined to institution building on a broad, holistic framework; and from “responding” to demand to “creating” demand. This is not business as usual for

Catholic schools. New leadership profiles are emerging and proving themselves over time. Through our Catholic Schools Practice, we are carefully monitoring these evolving best practices and documenting the results. We are also discovering new venues where promising Catholic school leaders may be found.

- And, finally, during the 1960s and '70s, when Catholic education was at its zenith in America, the presence of consecrated religious in these schools was pervasive and inspiring. At that time, vowed nuns, priests, and brothers represented 97% of the faculty and staff in these schools. Today, the number of consecrated religious in our Catholic schools is estimated at less than 3%. This has enormous implications for cost structure, Catholic identity, and governance. Some of the finest independent schools in America are Catholic schools founded by religious orders as part of their sponsored ministries. As the number of these consecrated religious continues to decline, maintaining fidelity to mission, core values, and sound fiduciary oversight is a huge and profoundly complicated challenge.

These are some of the recurring themes you will find in the reflections enclosed. The monograph itself will expand over time as we add new articles and consider the constructive feedback from our readers and partners in Catholic education.

In closing, I want to thank my colleagues Aggie Underwood and Ben Bolte for their encouragement and support and for their extraordinary editorial assistance. Aggie and Ben are grand masters of the search process and keen reviewers of the written word. They are also the best colleagues you could ask for. I also want to thank my former colleague Molly Donovan who not only provided brilliant editorial leadership but who, along with Greg Britton, persuaded me to write these reflections in the first place, and convinced me that we could make a difference by sharing our experiences and lessons learned. How right they were. As Managing Editor, Julie Piwowarczyk has been an exemplary partner in reviewing these articles and developing the structure and messaging of this monograph. She will be extremely important as we continue to learn and share new reflections with you. And, finally, I want to acknowledge the many fine Catholic school clients and candidates who entrusted their private passions and aspirations with us and allowed us to tell these stories gained from our experiences while working with them. We have tried to protect their privacy, and trust we have done so.

I hope you enjoy these reflections and will feel free to share your feedback with us. This is a joyful work in progress, and we are truly honored

to be learning together.

Sincerely,  
Bob Regan  
Senior Search Consultant  
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## **About the Author**

A Boston native, Bob Regan attended Catholic schools before launching a career that would ultimately take him to boarding school teaching, coaching, and house mastering, and then to the corporate world where he became a global marketing director for a Fortune-40 company. He was then recruited to become President and CEO of a prominent corporate college in the financial services space, a position he held for 21 years. Following his corporate college presidency, Bob followed his passion for equity and inclusion and served as Interim President for a struggling urban college, co-founder of a university freshman program for inner city students not yet college ready, and President of a Catholic school. Bob joined Carney, Sandoe & Associates in 2012 where he founded and currently oversees the firm's Catholic Schools Practice. Bob has conducted more than 30 leadership searches for Catholic schools and Arch/dioceses. He is one of the most sought after search executives in the Catholic schools space and believes the search process is not just about finding great leaders for worthy institutions—that's a given—but providing ongoing counsel to governing boards eager to improve their practices and take their schools to the next level. In some respects, "the going becomes the goal" in many of the successful leadership searches that Bob conducts.



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# Blessings: Of Grace and Catholic School Leadership

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Recently I called a former candidate we had placed as Head of a Catholic school to see how he was doing. For purposes of this story, let's call him Patrick. This is an inner city coed secondary school on the West Coast serving largely low-income black and Hispanic families. Formerly a diocesan school with a sponsored ministry, it had long been spun off and now stands alone as a beacon of hope and aspiration to inner city families. The school was in difficult financial condition for all the reasons one would suspect: declining enrollments, inability of families to pay tuitions, and lack of an enabling vision or strategy to reverse the downward trend. Patrick was excited about the challenge and felt his entrepreneurial skills and passion for equity and access would enable him to turn the school around and put it on a more favorable trajectory.

I caught Patrick at a good time. It was mid-afternoon, and he had just returned to his office from greeting parents and waving to the students and faculty amid the scrum of the day's parking lot exodus. I was extremely pleased to hear that Patrick's enthusiasm for this leadership opportunity had not only persisted, but that he seemed even more excited. He talked about the great kids at the school, their wonderful families, his dedicated faculty and supportive board, and how he wakes up every day excited to get back on campus. He also mentioned that a bold new plan had been approved by the board and was gaining traction and enabling him and the board to raise substantial funds. It was everything he had hoped for and more.

And then he uttered the surprising words. "Bob," he said. *"I must tell you, something else is happening with me that I didn't expect. I find that I am so inspired by this community of faith that I am growing in my own spirituality. I have always been a spiritual person, but now I know what my Catholic faith means to me and how it inspires my leadership."*

Patrick was not describing a conversion experience. He was not suddenly felled from his horse by a bright light from above. Instead, he has rediscovered through his daily ministry the profound meaning of his faith and his purpose as a Catholic school leader. How extraordinary, and how unexpected!

I have been thinking of this conversation and wondering how to make sense of Patrick's experience—and how it might guide the work I do as a search consultant for Catholic schools. We tend to think of leaders as “givers,” not receivers of inspiration. We think of them as formed adults, built to deliver and execute on demand. Their readiness to lead from day one is often the first quality we seek in school Heads. There is a compelling Latin expression that describes what we habitually seek in a leader: “*Nemo dat quod non habet*”—*You can't give what you don't have*. And so we tend to seek leaders who “have it all” and are viscerally inclined to give. But what about the capacity to receive, to be open, to grow in place and be enriched in spirit by the institutions and communities we serve? How might this matter? This is surely what's happening with Patrick, and he and the school are significantly better for it.

Another important element to the story is that Patrick had never led a Catholic school before and had no teaching experience in a Catholic school. Although he was raised in a Catholic family and attended Catholic grammar school, this was his first professional experience in this setting. Many Catholic school boards and search committees reject candidates like Patrick out of hand and insist on deeper grounding in the Catholic school mission and culture. But Patrick was not a jaded Catholic school leader. He did not take for granted the beauty and abundance of grace and faith on campus, the inspiration of weekly masses down the hall from his office, and the constant elevation of campus conversations around faith formation, values, and character development. It is too soon to tell whether Patrick's spiritual exuberance will be sustained, but after three years it seems solid and enduring.

And so I return to the question of meaning and what to make of this. A number of years ago I attended a Lasallian retreat as part of my own leadership development at the time. Amid the splendid, idyllic mountains of Northern California, we gathered as Catholic school leaders to renew our faith and refresh our purpose. As we transitioned one evening to “*magna silentia*,” the time of great silence in our retreat, we were asked by the presiding brother to reflect on the following:

*“I will bless you, that you may become a blessing.”*



I remember retiring to my monastic room that night feeling deeply moved by this profound and touching notion. And, strangely, it returns to move me again. I can picture Patrick walking the corridors of his school: a joyous, faith-filled leader who has been blessed, and in that graceful surround becoming a blessing to others. This is a community of faith growing together in wisdom and spirit. The thought itself is a blessing.

**Notes**

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# Effective Catholic School Leadership: 5 Essential Attributes

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As a search consultant, I am frequently asked to comment on executive leadership, and particularly whether there are qualities or attributes common to all effective Head of School leaders. Understandably, Search Committees are eager for certainties and seek persuasive and comforting counsel at the beginning of every launch. This is especially true today of Catholic school searches, since many of these institutions are undergoing enormously threatening (and promising) transitions—from *religious to lay leadership*, from *mission-inspired to vision-driven strategies*, from *operational to entrepreneurial leadership*, from *a culture of entitlement and security to a culture of competitiveness and risk*. Some schools are experiencing all of the above! Getting this leadership profile right is the most critical challenge facing Catholic schools today. This responsibility falls squarely on the shoulders of governing boards that are confronting this situation for the very first time. The stakes could not be higher or the threats more immediate.

Without seeming presumptuous, let me begin our conversation by suggesting that there are probably *five essential attributes* common to all effective Catholic school leaders today. The first four are largely intangible qualities requiring sensitive and intuitive vetting, and the fifth is a matter of hard record and should never be overlooked or marginalized.

In no particular order of importance, Effective Catholic School Leaders:

## **1. See Current Threats as Opportunities**

Undaunted by the massive market and demographic shifts that are putting their traditional business model at risk, effective Catholic school leaders confront challenges head-on and strategically. They don't ignore them, resent them, or squander time finding someone to blame, but acknowledge them as challenges that need to be addressed.

To borrow from former Intel CEO Andy Grove, effective leaders also see the current crisis as a “strategic inflection point,” a timely opportunity to retool, reposition, and renew their institutions. With quiet, reassuring confidence effective Catholic school leaders therefore operate with an appropriate sense of urgency, knowing that time is a precious and non-renewable resource—and knowing their school communities may never be more ready or eager to be led in a bold new direction.

## **2. Have Passion for Mission (enriched by Vision)**

Effective Catholic school leaders must personally exemplify, in their daily practice, the core values and traditions of the institutions they serve. As such, Catholic school leaders must exude and honor mission while celebrating Catholic identity and welcoming families and students of all faith traditions into their communities. They also know, however, that mission alone, while necessary, is no longer sufficient.

Effective Catholic school leaders today appreciate that mission is the abiding, spiritual platform from which service and innovation emanate. *They also know that mission enables, but vision inspires.* They know the importance of creating and articulating bold new visions for their organizations. They also know, as stewards of wealth and tradition, that big gifts chase big ideas; small dollars reward small ideas. While vision fuels fundraising and wealth creation for Catholic schools, it does so on an enduring bedrock of mission.

## **3. Take Complete Ownership of Material Results**

With contempt for excuses, today’s effective Catholic school leaders are viscerally and instinctively “generative.” They internalize what it means to be the *chief executive officer* of their institutions, and they make all essential things happen. Whether enrollment management, fundraising, or other capacity-building activities—whatever it takes, they own!

This is especially important for under-capitalized schools with limited revenue generating infrastructures. Although mindful of the need to leverage the goodwill and expertise of others in the community, effective Catholic school leaders *take singular responsibility for securing all resources necessary to sustain the mission of the organization and ensure its future.* They don’t do it alone. But they figure it out, create a culture of accountability, and make it happen.

## **4. Engage with Stakeholders in a Joyful Communal Compact**

Effective Catholic school leaders are humble, Christ-centered servant leaders who walk the corridors and playing fields, knowing every student

by name and every family by its legacy of involvement with the school. While leading and setting the agenda for success, engagement is distributed across the institutional footprint, ensuring a sense of communal pride, joy, and shared achievement.

Great Catholic school leaders don't take credit. The "I" is subsumed in celebration of the "we," the "now" in recognition of the "future." They know their stewardship is temporal and builds on the cumulative efforts of their predecessors. They also know the future of the school depends on a *continuing shared legacy*, and they will let go when their time comes, knowing the community has been renewed and a new generation of prideful participants has been engaged.

## **5. Know the Work**

We cannot say enough about this quality! Effective Catholic school leaders

- *Know the business of schools.*
- Know teaching, learning, and best practices—or know their importance and make it a priority to use their leadership platform in supporting these critical activities.
- Know mission, ministry, and the unique and awesome power of a community infused with faith and values.
- Know and love children and can inspire faculty and families with their passion and sense of purpose.
- Also know what good governance and family engagement look like.

This knowledge-based quality is especially important for Catholic schools that operate within the President/Principal structure. In this leadership model, the Principal assumes responsibility for the day-to-day operations and academic oversight, reporting to the President who functions as the chief executive officer and face of the school to the community. There is an unfortunate tendency on the part of some boards to swing too far toward the entrepreneurial qualities in the President and *diminish the importance of deep domain knowledge at the top of the organization*. This is a risky solution that can alienate faculties and skew the message to other constituents. Having said that, Presidents who understand their knowledge limitations and collaborate strategically with Principals in supporting and promoting best practices in teaching and learning are often the most effective Catholic school leaders. The President and Principal respect each other's gifts and become enlightened knowledge partners, utilizing their leadership platforms for synergistic purposes.

To anxious Search Committees seeking new leadership, I would suggest that this is an achievable and richly desired Head of School profile. *This is the kind of servant leader who will make you proud* and will provide your Catholic institution with a better chance of surviving the current threats, capitalize on emerging opportunities, and lead your school community to a sustainable and faith-filled future.

I hope you found this lengthy screed helpful and worthy of your time. It is my hope that this summary will be foundational to an extended conversation around the importance of effective Catholic school leadership—what it looks like, where we can find it, and how we can work together to produce and nurture our own. Please join me in sharing your thoughts.

### Notes

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# The 22% Factor: Hard Choices for Catholic Schools

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As I have argued in another post, Catholic schools are vital to the communities they serve and have emerged in recent years as the institutions of choice for families of all religious traditions, Catholic and non-Catholic alike. The appeal lies clearly in the extraordinary value proposition they represent: a unique synergy of four key elements:

- high-quality, independent education;
- safe, nurturing environment with a focus on the holistic development of children;
- values-based, spiritually enriched student experience grounded in Catholic identity but welcoming of families and children from all religious beliefs;
- a price point—though increasingly challenged these days—that is reasonably affordable to average American families.

A powerful value proposition indeed.

That said, Catholic schools are also increasingly at risk as intractable market and demographic forces are conspiring to render traditional business models and once-reliable leadership profiles obsolete. According to the latest Pew Research, more than 40 million Americans have abandoned their Catholic faith in the last generation, and only 22% of Americans self-identify as Catholic today. These trends have caused enormous market disruption, forcing the closing of thousands of local parishes and parish-based elementary schools. At the secondary level, Catholic schools can no longer rely on their privileged “feeder systems” to provide the kind of structural guarantee they have enjoyed for decades. These once-massive and almost viral feeder systems continue to erode with the closing of more than 5,000 Catholic elementary schools in the past two decades, and many more are projected to close in the coming months and years.

The broad-based pyramid of endless student referrals eagerly competing for limited seats at the top has been reduced to a solitary and rapidly diminishing silo—inadequate to support the enrollment needs of even the smallest of secondary schools.

As a result, it is commonly understood that Catholic secondary schools must adapt to the threatening new realities or go out of business. They must learn to compete for students in the open market. They will also need to raise their profiles and powerful value proposition in the community and learn to *create demand* for their services. And they will need to do this in an increasingly competitive environment, which includes outstanding charter, magnet, and International Baccalaureate (IB) schools funded generously by taxpayers.

Clearly this is not business as usual for Catholic schools. *And it is certainly not leadership as usual.* Perhaps for the first time in the history of Catholic schools in America, the future of these vital institutions may rely squarely on the quality and efficacy of the leaders they are able to attract. But here's the rub:

*When it comes to the available pool of qualified Catholic school leaders, there is a vast and growing disconnect between supply and demand.*

The demand for visionary leaders with passion for mission and Catholic identity has never been greater, and yet the supply is alarmingly inadequate and not showing signs of improvement. Colleges and universities with prominent Catholic Leadership Institutes have recognized this problematic disconnect and have launched strategic efforts to “grow our own.” However, they have not been able to achieve scale in a timely enough manner, and their focus is largely on producing operationally-sound “Principals,” not entrepreneurial chief executives. This is not a criticism. It's what they know—and what they do—exceedingly well.

As a result, governing boards and search committees are beginning to ask an increasingly important and provocative new question:

*Given the acute market risks we face, and the rare qualities required for effective Catholic school leadership today, does our next Head of School also need to self-identify as a practicing Catholic? Must we restrict our leadership choices to 22% of the population in America?*

This is an especially vexing question for Catholic schools facing imminent threats and needing bold, transformational leadership. The thought of eliminating 78% of the potential candidate pool is disconcerting and

places a trustee's fiduciary duty at odds with fidelity to mission. What if this means we overlook the "best player in the draft"—that rare, transformational leader who can preserve our mission, expand our capacity to support more children and families, and, in short, make us proud? Do we trade off dynamic and proven leadership for the vagaries of a numinous and deeply personal quality—i.e., "practicing Catholic"—which is difficult to validate and nearly impossible to define?

Moreover, what are the risks of getting this hiring decision wrong? If we select a superb, faith-filled leader who happens to be non-Catholic, are we on a slippery slope to secularization and insidious mission drift? Is that a price worth paying? On the other hand, if we choose an ardent, practicing Catholic who is wholesome, inspiring and orthodox, but essentially incapable of leading our school to a better place, are we acting as responsible stewards and fiduciaries? Is this a false choice?

I do not pretend to have the answer to the challenging questions raised in my previous post concerning slippery slopes and mission drift or the fiduciary duties of trustees faced with hard choices and dilemmas. Each school must deal with these issues on its own. But as a search consultant, I am often asked by boards and search committees to comment on this "practicing Catholic" requirement and to provide market perspective on how other Catholic schools are dealing with this issue, especially in light of "the 22% factor." For obvious reasons I am reluctant to impose an opinion, but I do find myself increasingly playing a kind of pastoral role by facilitating a healthy and honest discussion about core values, choices, and trade-offs.

Recently, for instance, a lengthy discussion took place during a search committee meeting when a trustee at an independent Catholic school asked what seemed at the time to be a disarmingly simple question of her colleagues:

*"What is it that constitutes a Catholic school?" she asked. "What makes our school distinctly 'Catholic'? Do we know? And how should this Catholic identity influence or limit our search for the next Head of our school?"*

A fascinating and respectful conversation ensued, which led inevitably to the question of what is fungible and therefore not essential to the identity and mission of a Catholic school. In other words, someone asked, *"What can we eliminate, replace, or modify and still be considered a Catholic school?"* After several failed efforts to achieve consensus, one person finally suggested that perhaps Catholic school identity is essentially amor-



phous and even ineffable. We may know it when we see it, but perhaps it cannot be described or prescribed but only affirmed.

I am reminded of the ancient identity conundrum represented by the Ship of Theseus. If you recall from your Philosophy 101 days, Theseus was the mythical king of Athens who slew the fearsome Minotaur and returned from battle a conquering hero, anchoring his ship in the Athenian harbor for all to view and celebrate. Over time, the planks of the ship withered and rotted and were replaced, one by one, raising the thorny metaphysical question: At what point in the replacement of these individual planks does the Ship of Theseus lose its identity and become another ship entirely? Is it with the replacement of the first plank? The fifty-first plank? The last plank? Is there a discreet point in this gradual, deconstructive process where the identity is altered and becomes something else entirely? Is the ship ever truly altered, or is it simply renewed and revitalized?

For generations philosophers have addressed this paradox but have never satisfactorily solved the puzzle. Heraclitus weighed in, arguing that all of life is continuously changing, and that we can never step into the same river twice. Change is therefore the only thing that persists. Hobbes, Locke, and other philosophers were equally bedeviled by the conundrum and failed to resolve the dilemma. We know from biology that our cells are replaced entirely every seven years, and yet we somehow remain the same person, with the same identity, despite the chemical transformation. What endures is our sense of ourselves, for better or worse.

Likewise, we may find it helpful to ask the same identity question of our Catholic schools: Is there a constructive or ideational plank that, if replaced, vitiates Catholic mission and causes the school to forfeit its identity and essential purposes? Is there a core plank dispositive of mission and identity? Is it the “practicing Catholic” identity of the Head of School? Is this the plank that carries the DNA of Catholic school identity? Years ago, some may have argued that having consecrated religious faculty and staff was essential to the mission and identity of Catholic schools. In the fifties and sixties, 97% of Catholic school faculty were consecrated religious—nuns, priests or brothers. Today, that plank has been virtually replaced, as only 3% of Catholic school faculty and staff are consecrated religious. In addition, students attending Catholic schools several decades ago were almost exclusively baptized, practicing Catholics. Today that plank has also been structurally compromised, as upwards of 60% of Catholic school students are non-Catholic, even

in Arch/diocesan secondary schools. The same can be said of Catholic school faculty as more and more non-Catholics are teaching in Catholic schools and participating in the liturgies and faith formation exercises while growing earnestly in their own religious beliefs. Trustee appointments have also diversified and become more reflective of the student population as a whole.

These are extremely difficult questions, but they go to the heart of identity and mission in Catholic schools and the challenge of responding effectively to changing market and demographic conditions while still remaining faithful to the core intentions of the institution.

Which brings us to the sensitive topic: The hard choices that Catholic schools must make in choosing their leadership and dealing with the 22% demographic factor.

It has been my experience in working with search committees, governing boards, and Arch/dioceses across the country that Catholic schools are becoming acutely aware of the enveloping threats and the need for dynamic new leadership. This has been a painfully slow, evolving, and reluctant realization in some cases. Most Catholic school boards are now willing and anxious to engage in a conversation about the radically changing leadership qualities required for success. But when it comes to the “practicing Catholic” component and the looming risk of the 22% factor, board positions are polarized and break boldly into the following choices:

### **1. The Existential Choice**

I use this term in the Sartrean sense—schools who select this choice enthusiastically embrace their Catholic circumstance and celebrate who they are, despite the 22% consequence. For these schools, requiring a practicing Catholic as chief executive is a matter of principle and not negotiable. They adopt the view that “we are Catholic first and last and will not compromise when it comes to the faith dimension required of our leadership.” If this has unfavorable search consequences, so be it. To quote William Wordsworth, *“In truth, the prison unto which we doom ourselves, no prison is.”* By accepting our existential circumstance and embracing the “practicing Catholic” requirement—come what may!—this choice can also be psychologically liberating and deeply reaffirming to the Catholic school community.

Inherent in this Existential Choice is also the belief that leadership is uniquely positioned to drive and perpetuate mission and to ensure the

Catholic identity of the school. While the religious composition of faculty, students, and families may change, leadership is a school's ultimate leverage in achieving support for its values and ensuring its future as a distinctly Catholic institution. Particularly in this messy environment of continuous identity plank replacements, the Head of School assumes a critical legacy role and becomes the essential "carrier" of the school's faith and sacramental traditions.

But this choice will also have definite consequences, of course: it will limit a school's choices substantially, producing a significantly smaller candidate pool while potentially extending the search by weeks if not months. Search committees may also overlook some outstanding candidates who may be non-Catholic but are faith-filled and authentically passionate about the mission and identity of their school.

Anecdotally, I would suggest that roughly **75%** of Catholic schools adopt this Existential Choice, continuing to require a practicing Catholic at the top and believing that the absence of a practicing Catholic in the corner office is a slippery slope to secularization and corruption of mission. Although this sentiment is beginning to soften, it has been my experience that this Existential option remains, by far, the dominant choice among independent Catholic school boards—and virtually all Arch/diocesan schools continue to require practicing Catholics in key leadership roles.

## **2. The Ecumenical Choice**

This option is increasingly being explored by governing boards and enables schools to broaden their perspective and open the pool of potential candidates to individuals who may be non-Catholic but who meet the intrinsic faith standard and are genuinely capable of exemplifying the core values and traditions of their school. These boards tend to argue that the institutional stakes are too high to limit choices to an arbitrary and numinous faith standard where definition is so elusive and authenticity can never be proven or validated. While they are committed to the Catholic mission and identity of the school, however defined, *they want more control over their options*. They want their search consultants to produce a diverse and robust candidate pool for their private review and consideration. The search process becomes for them a kind of journey in discernment, informing their collective judgment and leading to an honest but rigorously pursued consensus. In the end, they may yet choose a practicing Catholic as their next Head of School, but they want that choice to be made in the context of a nationally sourced, competitive process involving candidates of different backgrounds and religious beliefs.

Inherent in the Ecumenical Choice is the belief that Catholic schools are evolving and becoming “unifying” entities in their communities, capable of thriving in Catholic mission and identity while welcoming families and staff from different faith traditions—even the Head of School. These schools believe that mission endures because their core values endure; this is the persistent identity plank in the hull. At a time when American culture is becoming increasingly coarse, secular, and divisive, Catholic schools are distinctly welcoming and inclusive sanctuaries, as evidenced by the diverse religious and ethnic representation throughout the school community.

This choice will also have definite consequences as well—both positive and potentially negative. On the positive front, the latest Pew Research includes a growing demographic category called “*Catholic connected*”—i.e., individuals who are not practicing Catholics but are connected meaningfully to the Catholic faith via marriage, prior schooling, family history, etc.—that now represents **45%** of the U.S. population. If Catholic schools can achieve consensus around the validity of Catholic connected leadership, *this alone will more than double their pool of potential candidates and virtually eliminate the risk of the 22% factor!*

That said, the risks of this choice are significant and require prudent trustee attention. Communications and intense constituent engagement at the front end of a search are absolutely critical in achieving support for the Ecumenical Choice. All key constituents must be supportive of the decision to open the pool to non-Catholic candidates, and they must be prepared to advocate for this decision. This is especially true for independent Catholic schools with sponsoring religious congregations who oversee mission and hold reserve powers. Simply put, without the support of the sponsoring religious congregation, this plan is dead on arrival and will never get off the ground—nor should it.

### **3. The Endogenous Choice**

There is also a potential third option for boards to consider in dealing with the 22% factor: a nuanced, hybrid strategy that could be applied to both of the above choices in expanding the potential pool of candidates while mitigating the demographic risks of the 22% factor. We might call this the Endogenous Choice, because it focuses *internally* on the structure of leadership adopted by the school. As discussed in another post, the President/Principal model has emerged as the leadership structure of choice for many Catholic schools and now comprises upwards of 60% of all Catholic secondary schools. One of the extraordinary benefits of the model is its ability to expand the pool of CEO candidates by bifurcating

duties between an operationally-sound Principal (as chief academic officer) and an entrepreneurially-driven President (as chief executive officer). Because the day-to-day academic operations are being addressed by the Principal, this enables search committees to pursue non-traditional but highly qualified CEO candidates from other mission-critical platforms, such as higher education or Catholic foundations, associations, and charities—and even from certain corporate arenas. *Knowledge of secondary education per se is less important than passion for mission and the ability to lead, inspire, transform, and create demand.* Without ever raising the sensitive issue of whether a candidate is a practicing Catholic versus non-Catholic or Catholic-connected, schools can make the safe Existential Choice, if preferred, but maximize the possibilities inherent in the 22% demographic. This will not expand the demographic pool itself, but rather the available candidate options within the pool. And schools can do this without formally converting to the President/Principal model by simply realigning leadership responsibilities and calling the functions by whatever names they prefer. To avoid the perception of elitism or be forced to deal with misplaced complaints concerning profligate expense practices, some schools prefer to maintain the traditional “Head of School” nomenclature but adopt the best practices inherent in the President/Principal model.

Either way, messaging and alignment of duties are complicated and will require careful crafting and board attention, but this is a relatively accessible, internally inspired option that all Catholic schools should consider whenever they have an opportunity to revisit their leadership priorities.

## **Conclusion**

As I trust you will agree, we have clearly entered uncharted territory in the Catholic schools sector. Strange and seemingly ineluctable forces have transported us to an unfamiliar landscape where life is different and simple choices no longer abide. Largely through no fault of their own, many Catholic schools are at risk, and the trustees and diocesan officials know it. They also know that Catholic schools have emerged in recent years, despite the unfortunate market and demographic threats, as the institutions of choice for many American families, Catholic and non-Catholic alike. To borrow a Wall Street expression, *Catholic schools are simply too important to fail.*

As a result, a promising new dialectic has seized our boardroom conversations, creating a sense of urgency seldom experienced before. Perhaps for the first time, trustees of Catholic schools know that the future of their cherished institutions may rely on the quality of the next leader they

choose. Given the 22% factor and the enveloping market threats, there is no margin for error. Getting the leadership decision right demands a new rigor and candor in the deliberative process. Each school needs to come to terms with this on its own and be true to itself and its core values. But whether a school chooses the Existential, Ecumenical, or Endogenous option, or some combination thereof, the willingness to engage courageously, to ask the difficult questions, and to confront the limited choices is itself wholesome, encouraging, and self-renewing.

Serendipitously, it may also help ameliorate the vexing identity dilemma faced by Catholic schools. To paraphrase T.S. Eliot, at the end of all their exploring and questioning, their fearless probes and intimations, they may arrive where they started, and know the immense power of their Catholic purposes for the very first time. That alone would be worth the hard journey.

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# Catholic Schools in America: A Unique Value Proposition

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At Carney, Sandoe & Associates, we are inspired by the belief that Catholic schools are absolutely vital to the communities they serve, and that their powerful value proposition consists of four key elements that render these institutions unique and indispensable to families. In the hands of the right leadership, these competitive elements are profoundly synergistic and position Catholic schools as the institutions of choice—for Catholic and non-Catholic families alike.

Catholic schools in America offer the following:

## **1. High-quality, independent education**

For the most part, Catholic schools are unfettered by extraneous demands and bureaucratic regulations and are committed to accountability and the best practices inherent in high-performing independent schools. Catholic schools are also active, collegial members of national and regional associations and have the liberty and wisdom to avoid faddish trends while focusing on core skills, content-rich curricula, and measurable student achievement. Teachers are caring, competent, and mission-driven, and choose to teach in Catholic schools despite the relatively low rate of compensation. As a result, numerous national and regional studies have consistently shown that Catholic schools outperform public schools in student achievement, especially in the inner city. One 2011 study, “Educating Our Children: Catholic Schools Doing More with Less,” demonstrated that average SAT scores among Catholic school students were 23% higher, while expenditure per student was nearly 25% lower. According to our research at Carney, Sandoe & Associates, 76% of parents identify academic rigor as their top priority in selecting a Catholic school for their children. For an increasing number of parents, “academic rigor” is equivalent to “values-based experience” as the reason for sending their child to a Catholic school.

## **2. Safe, nurturing, accountable environment**

A secure environment with zero tolerance for bullying and external threats is the first requirement of every school. Catholic schools excel at cultivating a welcoming and respectful school culture and embrace a holistic approach to human development, including an active commitment to body, mind, and spirit. Some schools we work with have called this a kind of Renaissance model for student fulfillment, encouraging students to explore and experiment joyfully to discover their gifts and true passions. In addition, Catholic schools promote a high level of family engagement and connection to community, resulting in significant growth in social capital and a sense of accountability among students. This authentic sense of community, infused by mission and shared purpose, and linking school and home, is one of the most salient and indispensable features of Catholic schools.

## **3. Values-based experience and mission built on Catholic identity... but welcoming of all faith traditions**

This is a critical differentiator for Catholic schools and a key reason why families of all faiths seek this experience for their children. While passionate about their Catholic identity and mission—requiring all students to participate in communal prayer and liturgies—Catholic schools are distinctly welcoming of all faith traditions. Students are encouraged to grow in their own beliefs while exploring comparative religions and being respectful of others. Faith formation is a core component of the campus conversation. In many Catholic schools, the percent of non-Catholic students and staff exceeds 30%—in some schools, this population reaches as high as 60 or 70 percent. Even arch/diocesan schools in some regions are seeing their demographics shift to include higher percentages of non-Catholic families. These families share a common concern about character development and moral behavior, the insidious coarsening of American culture, and the increasing secularization of schools and society at large. Catholic schools become an inviting sanctuary for these concerned families.

## **4. Family-friendly tuitions**

With few exceptions, Catholic schools deliver a quality experience at a price point that is reasonably affordable to average American families. In some communities, independent day schools charge roughly \$40,000 to \$45,000, while Catholic schools charge anywhere from \$8,000 to \$18,000, on average. This is an extraordinary differentiator and compelling element in the Catholic school value proposition. Although some critics would like to see Catholic school tuitions reduced even further to enable access for all income levels, including the materially poor, this would



collapse the business model and produce an unsustainable practice. The voucher argument has also not been persuasive in many states, although traction seems to be gaining. Given the political dynamics of this debate, the role of philanthropy is to enrich the value proposition by ensuring equity and access for all who seek this extraordinary experience for their children, regardless of ability to pay.

At CS&A, we see the combination of these four value components as synergistic and quite unique in U.S. education. In the corporate world, this would be considered an unbeatable “Killer Combo”! The sheer scale of this education model is also inspiring and unprecedented. More than 7,000 Catholic schools are educating upwards of 2.1 million students annually. But the news is not particularly sanguine at the moment. For reasons having little to do with performance or value to the community, many Catholic schools are currently at risk and facing persistent, cumulative threats. According to the Center for Applied Research in the Apostolate (Georgetown University), since 1965, more than 40 percent of Catholic schools have been closed, denying families of all faiths access to this exceptional option and burdening local school districts with a sudden infusion of displaced and discouraged students. The trend is alarming, pernicious, and consequential—and showing no signs of relenting.

Here is what we know for certain: When a Catholic school goes away, for whatever reason, it blows a hole in the community that is not likely to be replaced. The mission is forfeited forever.

Here is what we also know for certain: Given the cumulative threats imperiling Catholic schools, a new kind of entrepreneurial leader will be required to ensure the future of these vital institutions, one with exceptional vision and passion for mission, who can convert threats into opportunities, and who can credibly and persuasively raise the profile and powerful value proposition of Catholic schools in the community. Business as usual will not get it done. It is no longer about responding to demand but creating demand. No longer about mission alone but mission inspired by vision and high achievement. For Catholic schools, the value proposition is not in question. What remains to be seen is whether a new generation of leaders will rise to the occasion—and in sufficient numbers—to ensure the future of Catholic schools. Though we might all wish it weren't so, there are no guarantees, despite the existence of an overwhelming value proposition. Going forward, it's all about leadership.

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# Fundraiser vs. Institution Builder: A Preferred Leadership Profile for Catholic Schools

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## *Part I: The Fallacy*

Like the twin certainties of death and taxes, I have come to anticipate two hard realities of my work as a search consultant to Catholic schools. Both certainties appear at the front end of the process and involve search committee demands around the qualities and characteristics of the candidates they expect us to produce.

The first requirement is that the next Head of School must be a “practicing Catholic,” however one defines the term. This is a complex and often sensitive matter, which I have addressed in other posts (“The Path a Search Takes” and “The 22% Factor”). The other requirement—increasingly prevalent and concerning these days—is the very strong preference of trustees and search committees that we restrict our search to those candidates with a “proven track record in fundraising.” Whatever other gifts the candidate may possess, the ability to raise money is an essential requirement in the profile, and it must be clearly demonstrated and validated in the career record. This is especially true of undercapitalized Catholic schools with declining enrollments and eroding balance sheets. The default solution of anxious trustees is to seek the quick fix—the silver bullet, if you will.

Although quite understandable, it has been my experience that the fundraiser as a quick fix or effective turnaround agent is a fallacious assumption and is dangerously misguided as a Head of School search priority. Narrowly defined, the fundraiser profile is substantially incomplete and therefore inadequate to the task of leadership, especially when transformational change is required. If given top priority in the search, the fundraiser profile can also lead to either of two failed outcomes: 1. While screening for the proven fundraiser, you may ultimately overlook the one

true game-changing candidate in the pool. In this instance, the fundraiser becomes a kind of fool's gold, a glistening distraction; or 2. The second failed outcome in the search is equally perilous and can lead to a longer-term problem for the school: Be careful what you wish for; you may actually find what you seek! Bad hires have costly consequences. We know from performance management that "What gets measured gets done." A truism in leadership search is, "What gets sought generally gets found." In search, profile is destiny.

So, what, then, does the preferred transformational leader look like? What is the right candidate profile, and where might we find such game-changing leaders? In the following pages, I will share a couple of exemplary stories—from actual experience—and then we can pull the thread from these narratives to see if we can draw some guiding conclusions. I will then propose what I believe is the preferred leadership profile for Catholic schools seeking enduring, transformational change. This is a rare but attainable fusion leader with exceptional vision, passion for mission, and the ability to empower staffs, elevate communal aspirations, and make extraordinary things happen. This preferred profile includes fundraising as a vital component in the mix—not so much as an acquired skill set or proven career record but as an intrinsic leadership quality, core to the executive disposition, and manifesting itself in manifold, mission-affirming ways across the institution. In simple terms, I have come to regard this generative form of Catholic school leader as an "Institution Builder," and its descriptive profile: "I-B" leadership.

## *Part II: Two Illustrative Narratives Taken from Actual Experiences*

### **Catholic Academy's Choice**

The first exemplary story is a recent conversation I had with the Board of Trustees at a struggling Catholic secondary school in the Northeast. This story will begin to establish a clearer distinction between fundraising and institution building as desired leadership qualities. For purposes of this narrative, I will refer to this school as Catholic Academy.

CS&A was invited to meet with the full Board to discuss our services and to explore whether we might be a good fit to support their search for new leadership. The school itself is located in a hardscrabble, industrial town whose better days are clearly in the past. Perhaps not surprisingly, enrollments at the school reflect the declining fortunes of the local economy. The facility was old but well maintained and welcoming. (Like all Catholic

schools, the floors were polished to a bright sheen!) The financial condition of the school was deteriorating, but the Board remained committed to the mission and confident that the situation could be turned around quickly with the right leadership.

The meeting began with the usual introductions and pleasantries around the table and then the Board Chair quickly launched into his commentary.

“Bob, we cannot afford to make a mistake here. For years, we were led by the good sisters who sponsor our school, and then we converted to lay leadership a few years ago and selected an educator with tons of experience in the classroom and as principal at another Catholic school. He was a nice guy and had excellent recommendations, but his tenure was a bust. He focused on all the wrong things, despite our urgings. Our financial hole got deeper. After several attempts at a cure, we decided to part ways, and have done so amicably. We have also learned from our mistake and now seek a Head of School with proven fundraising experience. We need someone who can make things happen fast. Can your firm deliver such a person?”

This was clearly a no-nonsense kind of guy—reasonably cordial but right to the point. From the rapid nods of approval around the table, I could see that this was also a top priority for the entire Board, not just the Board Chair. An eager silence awaited my response.

“I understand,” I responded. “We hear this theme all the time, and I am confident we can deliver an outstanding pool of candidates. But before going into other details, could you tell me what you mean by ‘proven fundraising experience?’ What kind of experience are you talking about?”

The pleasing nods of approval quickly changed to looks of amazed incredulity. Is he REALLY asking us that question? Of all people, doesn't he know what we mean by “fundraiser?”

“I'm not sure I understand your question, Bob. Is there another kind of fundraiser that we don't know about?”

“Perhaps,” I said. “Let me clarify. Hypothetically, what if we could present candidates with a remarkable history of growing enrollments in every leadership role they have played? Would that matter to you? Enrollments are a source of revenue, of course, and they are annuities, not one-time gifts. Would such a robust revenue-generating scenario meet

your definition of fundraising experience?”

With that, the reactions around the table were varied. Some rolled their eyes in continued disbelief at my impertinence, while others squinted and nodded in unison as if to suggest that this could be an interesting line of thinking. The Board Chair was the first to speak, however, and his opinion prevailed.

“No, it would probably not meet our definition of fundraising. And for good reason. Enrollments take too long to happen, and the community is already discouraged and losing confidence. We need someone to come in here with a sense of urgency and hit the ground running. Our next leader needs to be a proven rainmaker and needs to raise money from day one.”

“I understand,” I said. “And please know, I am not trying to be rude or disrespectful, and I have great admiration for the important work you do as trustees. But I need to ask you a difficult question, if I may. To raise money—at least in meaningful amounts—you need two things: you need a willing donor with capacity, and you need a compelling story to tell, a reason to give. What will the next Head of School at Catholic Academy be selling from day one? What’s the compelling story here?”

You can imagine where our conversation went from there. This well-intentioned board was convinced that the school’s Catholic mission, alone, was the compelling story and reason for others to give. Its worthy mission, along with years of faithful service to its community, were sufficient grounds for an entitled future. Past is prologue. The fundraiser they hire will figure out how to tell the story. If, by chance, the fundraiser is also an experienced school leader who possesses those other leadership intangibles, that would be all to the good. But the core requirement, the sine qua non, was proven fundraising experience. This is the resolute choice they made.

An hour or so later, I was thanked for taking the time to meet, and graciously shown the door. It is my understanding that the search for a fundraiser as Head of School is now underway.

### **Jeremy’s Failed Leadership**

This second story is an unfortunate “after the fact” narrative that demonstrates how hiring mistakes emanate from faulty assumptions and search priorities. It also demonstrates insidious misalignment between board expectations and CEO performance. But it has a hopeful ending.

Two years ago, I received an email from the Board Chair of an independent, Catholic secondary school in California asking if we could schedule time to talk privately. We did not know each other at the time, so I thanked her for reaching out and asked if she could share with me in advance what she wished to discuss. She responded (confidentially) that the current president of her school was in the final year of a three-year commitment, and the board was considering not extending his contract. They wanted to seek our professional counsel before making a final decision. We spoke within minutes. It turns out that the school had been experiencing declining enrollments for a number of years—long before the current president was hired—and the situation was becoming increasingly discouraging and threatening. The prior, long-time Head of School was a brother who was retiring, and the board saw an opportunity for transformational change in the impending leadership transition—a potential inflection point, if you will. Timing was fortuitous. They decided to go big and package a total solution in two parts: convert to the President/Principal Leadership Model and seek a lay leader with proven fundraising skills. This artful combination of a new leadership structure and dynamic new skill set in the corner office was compelling and potentially synergistic and created a buzz on campus and in the boardroom.

After months of sourcing on their own, they found Jeremy, their current president and CEO. Jeremy seemed like the perfect candidate to the board. A practicing Catholic and family man, Jeremy was a development officer in a local health care organization. He had zero educational leadership experience, but he seemed genuinely passionate about Catholic mission and identity and brought a successful portfolio of fundraising results. In the President/Principal Model, his lack of educational leadership experience would be sanguinely offset by the principal who serves as chief academic officer overseeing day to day academic operations. There seemed to be no downside to the decision, and only upside promise. Or so they thought.

“Problem is,” said the Board Chair, “here we are, nearly three years later, and nothing has changed. Our enrollments are still declining, we are losing some of our best families, and all Jeremy wants to do is raise money—and not big money, mind you, but small amounts, nickels and dimes, really—hardly enough to compensate for the growing number of empty seats in our classrooms and loss of confidence in the community. Don’t get me wrong,” she countered. “Jeremy is a nice guy and has done some good things—like raising money to refurbish our library. But our enrollment and revenue problems persist and are getting worse, and we are running out of time.”

The Board Chair went on to explain that Jeremy had a narrow view of his role as president and believed that responsibility for strategic planning and vision setting belonged exclusively to the board. Without a determined CEO driving the change agenda, the board was incapable of achieving consensus or traction around a new vision or plan for the school. Jeremy's insouciance created a leadership vacuum at every operating level. As the institution's "outward facing" leader—his view of his role—he was disinterested in the messy business of running a school and delegated all operational responsibility to the principal who felt increasingly overwhelmed and powerless. Faculty and staff morale were deteriorating, and the school's 90-year brand was in reputational freefall. Some feared a certain death spiral was under way.

Not surprisingly, the Board Chair reported that the relationship between Jeremy and the board had become increasingly contentious if not toxic. The board accused Jeremy of failing to deliver on his promises and for his dereliction in refusing to exercise the fullness of his responsibilities as CEO. For his part, Jeremy accused the board of failing to lead by example when it comes to giving, and for failing to take the lead in creating a culture of philanthropy at the school. "This is not a one-man show," he argued. Ruefully, the Board Chair could not disagree entirely with Jeremy's claims.

Within days of our conversation, Jeremy was informed that his contract would not be renewed at the end of the academic year. The Board Chair reported that Jeremy seemed relieved and accepted the decision without rancor or bitterness. I will not discuss the details of the successful national search we conducted for Jeremy's successor or how we dealt with the evident board dysfunction that revealed itself during Jeremy's disappointing tenure. Those may be appropriate topics for a later post. Suffice to say, we are hopeful and believe the school may now be positioned for the long-anticipated transformation.

### ***What Conclusions Might We Draw From these Two Narratives?***

They say hard cases make bad law. The two stories discussed above are admittedly hard cases and somewhat oversimplified, but they are factually true and not uncommon and speak to the kind of governance pathologies that can lead to bad policy and misguided hiring practices. There is much we can learn from them. With genuine respect for the good individuals and institutions involved in these stories, I would like to suggest that there are at least four (4) important conclusions we can draw:



First and foremost: Avoid the temptation to seek the quick fix. There is none. Instead, boards would be well advised to begin every Head of School search in honest reflection and frank discussion before launching the search or leaping to conclusions. In Joseph Heller's humorously dark novel, "Catch-22," one of the characters says of his clueless adversary that he can't see things as they really are because he has flies in his eyes. "And how can he see he has flies in his eyes if he has flies in his eyes?" To ensure clear thinking, and wash any flies from their eyes, boards should engage in a collective exercise to achieve clarity of purpose and understanding. Boards should go off site and ask themselves three gating questions:

- Where are we as a school and how are we positioned (qualitatively) relative to our peer institutions? Are we a Tier I, Tier II, Tier III, or Tier IV institution, and why?
- What do we aspire to become as an institution, and what will we need to accomplish to achieve our ambitions?
- What kind of leadership will be required to take us there? In other words, what are the necessary leadership qualities and experiences we seek?

I can assure you, if you are thoughtful and honest with yourself and your board colleagues, you will come to see things as they really are and not rush to a facile conclusion and select the fundraiser profile, narrowly defined. The profile you construct may include fundraising as a desired executive trait or set of experiences, but it will be more robust and nuanced and will encourage you to keep an open mind and allow the search process to inform your judgment. To some extent, the search process works best when it becomes a journey in discovery and discernment. Allow yourself the opportunity to be surprised. Very often, the most prodigious fundraisers in Catholic schools turn out to be people who never had any formal fundraising training and who never raised money until they assumed the formidable responsibilities of Head of School. And then their talents and passions kicked in serendipitously, and with awesome, game-changing results. It happens.

A second conclusion I would suggest is this: Regardless of what is stipulated in the CEO job description, incumbents tend to do what they know how to do and enjoy doing. As Jeremy's self-destructive behavior clearly shows, his passion was fundraising, not leading. He thrives on the challenge of aligning donor interests with the needs of the school, and closing the deal. Justice Felix Frankfurter once wrote, "A power conscious of itself seeks expression." From a search consultant's perspective, truer

words were never spoken. This is why runners run, singers sing, and leaders lead. Jeremy was simply expressing his passion, which is meeting people and asking for money. Lesson: If you require leadership, seek a leader not a fundraiser. Jeremy's passion and board expectations were radically misaligned from the outset. Success never had a chance.

As Jeremy's experience also attests, fundraising is not an effective intervention strategy. You cannot fundraise your way out of systemic decline. Whatever incremental gains can be achieved through personal solicitations and grant writing, they will never be sufficient to compensate for the massive outflows of cash caused by declining enrollments and eroding reputation and brand. There is not enough flour in the universe to support the number of cake sales needed to fund an adequate recovery through fundraising and events alone. The turnaround must begin by restoring enrollments and rebuilding the confidence and trust of the community. This is the important work of Institution Building.

In a related manner, and as suggested in both the Catholic Academy and Jeremy scenarios, successful fundraising can never be based on mission alone but must be powered by vision. It's what you do with your mission, what you inspire from its core values and traditions that resonates with donors. Jeremy's fundraising could never be truly transformational because it lacked a bold purpose. The small amounts he raised were dispositive of his failed notion of leadership and the proper role of chief executive officer of a Catholic school. To his credit, Jeremy's modest fundraising results generated additional cash for the school, which enabled much-needed, though relatively minor facility improvements. For schools at risk, however, such marginal results are inconsequential and illusory. They may help get your school through another day, but not to a different place. The transformation so viscerally needed and urgently anticipated never occurred. This is also the central fallacy in the Catholic Academy board's thinking, and why their Head of School search is likely to produce a fundraiser positioned for frustration and ultimate failure—another Jeremy story in the making. Without a compelling reason to give, and give big, donors of allied goodwill and affection for the school will be pleased to support your mission, but only in modest, perfunctory amounts. As I have written elsewhere, "Mission enables but vision inspires." Big gifts chase big ideas, while small gifts reward small thinking. ("Effective Catholic School Leadership: 5 Essential Attributes")

### *Part III—I-B Leadership: A Preferred Profile for Catholic Schools*

As stated earlier in this piece, I believe the right solution for Catholic schools seeking transformational change is what I have come to call the “I-B” leader or Institution Builder. Fundraising narrowly defined is necessary but not sufficient as a credible profile capable of driving change and sustaining high performance.

Although certainly rare and valued as such for their scarcity, I-B leaders are no more elusive or difficult to find than great fundraisers and can be sourced in multiple venues. But you need to remove any flies from your eyes and search broadly and asymmetrically. Wherever mission is core to an institution’s purposes, there you may find an I-B leader. This includes schools and colleges as well as mission-critical non-profits such as foundations, associations, and charities—and even certain corporate platforms. Every high-performing Catholic school I have ever known is led by an I-B leader. They are alike in many ways, but are also variations of a wholesome theme. It is not skill set or career experience that unites them but qualities of character and leadership. Your vetting needs to focus on validating those qualities.

As you search, remember Peter Drucker’s admonition that “Culture eats strategy for breakfast.” Fit is everything.

Remember also the progenitor effects of “place:” precisely where one has acquired his or her management habits or learned acceptable norms of corporate behavior is just as important as the details of those experiences themselves. Place matters—as the child is truly father to the man. Beware the leader who is coming from a bad place and is already socialized (unknowingly) to the worst practices. Those practices are coming with him (or her).

In some ways, I-B leadership is a distinctly Catholic concept because these gifted visionaries are not just passionate about mission but subservient to mission. It is mission that gives meaning to their leadership. They see leadership of a Catholic school as an honor and a privilege and they use their anointed platforms for bold and worthy purposes. They also view institutions organically and value every facet, feature, function and person, from custodial to instructional, to governance and sponsorship. Joyful and fundamentally relational, I-B leaders walk the corridors of their institutions in vigilant exuberance, empowering others by acknowledging their good work and encouraging high achievement. The sheer act of noticing is enriching and emboldening to staffs, fusing

an institutional alliance that is strong and loyal from the inside out and bottom up. Under I-B leadership, the whole is always greater than the sum of its parts, and through a kind of fusion effect create an immensely powerful sense of community in which every individual is valued as a member of a belief-centered family, Catholic and non-Catholic members alike.

One of the greatest relational assets available to Catholic schools has always been grateful families eager to be engaged. I-B leaders know this instinctively. Without burdening busy adults with unreasonable requests, I-B leaders adopt effective family engagement practices that make it easy for this vast reservoir of goodwill to be leveraged for dynamic purposes. Properly engaged and motivated, families become fluent advocates in their communities, viral and ardent. I-B leaders know that familial goodwill is multi-generational and dependable, and like the solar energy that surrounds us daily, suffusing our lives with untoward warmth and blessings, it is *abundant, free, and infinitely renewable*. There may be no greater source of institutional vitality than engaged families, and I-B leaders know this and capitalize on it.

I-B leaders also take their responsibilities seriously and internalize what it means to be the chief executive officer of a Catholic school. They focus relentlessly on three things: enrollments, Catholic identity, and the quality of the student experience. Without making excuses or assigning blame, they know that intractable market and demographic forces have unfairly placed many fine Catholic schools at risk, and they use their talents and leadership platform to raise the profile and value proposition of their school and to “create demand” for the unique gifts of a Catholic education. As accountable, generative leaders, they also make it their personal responsibility to secure whatever resources are necessary to support and sustain the mission of their institutions.

As for fundraising itself, I-B leaders are the first to acknowledge its critical importance. But they define fundraising holistically and consistent with the way they approach their work. They know that effective fundraising must include all sources of revenue—most of all, growing and sustaining enrollments. They also know that vision inspires purpose, and for that reason work tirelessly to elevate aspirations and achieve communal support for big ideas and transformative agendas. To the I-B leader, effective fundraising can be defined as follows:

*Effective fundraising is the earned outcome of a vision well formed, and bold, inclusive of community, and constructed on a bedrock of enduring*

*mission.*

All elements are essential to the definition. This is the transformative work of the Institution Builder. This is not to suggest that the work is easy or that simply saying it makes it so. The I-B leader still needs to formulate a complex plan for change and execute that plan with discipline and rigor. In this regard, institution building is best regarded as the strategic lens through which the change agenda is conceived. This is how Catholic schools will persist and thrive going forward.



In his disarmingly moving prose poem, “A Servant to Servants,” Robert Frost counsels, “The best way out is always through.” This seemingly simple observation is a succinct reminder of the lessons of failed leadership and governance. There are no easy solutions, no short cuts or quick fixes. The human journey is a pull-through, existential scrum, rewarding rigorous process and honest reflection. As suggested above, boards would be well advised to begin the Head of School search process with a difficult conversation around the current condition of the school, how it compares with its peer institutions, and what kind of leadership will be required to address systemic challenges and take the school to the next level. It is hard work, for sure, but the results will be cathartic and self-renewing. Once hired, the new Head of School will also be well advised to do the equally hard work of vision setting and institution building before presuming to go big with one’s asks.

If done well and thoughtfully, and with graceful regard for the foundational importance of mission, the results will be transformational, lasting, and, perhaps best of all, “earned.”

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## The Path a Search Takes

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Recently, I met with the Search Committee at a large diocesan Catholic school in a major metropolitan area of the mid-Atlantic. We were one of several search firms invited to meet privately and pitch our services. The committee was rather large and consisted of representatives from the Board of Trustees of the school as well as the central office of diocesan schools, including the Superintendent. As is often the case, this was the first time this Catholic school had ever conducted a search for a Head of School, and the anxiety around the table was palpable. They were new to this—and the future of the school (as well as the committee members' personal reputations) was on the line.

After the usual introductions and opening comments, I discussed our search process and timeline, as well as the unique capabilities of our Catholic Schools Practice. The Superintendent then opened the formal Q&A proceedings by saying, *“Well, of course, Bob, first and foremost we will require a practicing Catholic for this leadership role.”*

I acknowledged the unanimous nods of approval around the table and commented that I understood. *“I’m wondering, however,” I said, “and without being offensive, could you tell me what you mean by ‘practicing Catholic’?”*

I wasn't being flip or disrespectful, but the question seemed somehow appropriate at the time. The reaction around the table was one of stunned silence. All eyes turned to the Superintendent, a large, garrulous man who had served in his current role for many years. Although clearly surprised, he took the question in good humor and proceeded to describe what it meant, in his estimation, to be a practicing Catholic: regular church attendance, no public pronouncements against the teachings of the Church, a life lived with gospel values, etc. Before long,

others were chiming in with their own definitions, and soon it became apparent that there was no consensus around the table about what it meant to be a practicing Catholic!

Feeling emboldened, I then directed an operational question to the group: *“Let me ask this in a different way. In evaluating candidates, what will you be looking for that will affirm for you that the person under consideration is truly and genuinely a practicing Catholic? How will you know? What will you be looking for?”* Our discussion continued respectfully and robustly for some time. And in the end the bond we achieved, as thoughtful, earnest colleagues, was real and deeply gratifying.

Several days later I received a call from the Search Chair saying we had been selected to conduct the search, and that they were so grateful for my candor in getting them to reflect on the process and to examine their most fundamental assumptions. She mentioned that no other search firm had questioned the “practicing Catholic” requirement or forced them to think boldly about the process and their priorities. Since our meeting, the committee has come to a new appreciation of its role and the critical importance of honest reflection.

What does this mean, and why do I share this story? In a kind of oblique way, I have come to realize that a search process conducted well and thoughtfully is an existential journey: a communal process of introspection, discovery, and renewal. But that process must begin with honest reflection—about mission, core values, and shared responsibilities. Robert Frost said of love that it “begins in delight and ends in wisdom.” That seems to be the path a search takes—beginning in delight at the sense of excitement and future possibilities, and ending in wisdom with a renewed understanding of a school’s unique place and purpose in the world. A good search is organic, dynamic, and potentially transformational. And the role we play as search consultants is one of profound privilege. We are invited to participate in the most private conversations about schools and leadership and the people who make a difference in the lives of children. Often, the search itself becomes the occasion for a larger conversation with boards. While focused intently on finding exceptional leaders, we can’t help but see from our detached perspectives the things that could be improved, practices that aren’t quite best, or assumptions that need to be challenged. It is a kind of pastoral role: guiding boards and search committees through a strange and threatening process, but always driving purposefully to a successful conclusion. The blessings are abundant and often arrive by surprise.



As for that Catholic school in the mid-Atlantic? I will confess that although there is still no consensus around the table regarding the definition of a “practicing Catholic,” we have learned as a Search Committee to honor its importance and have agreed on a probative process to mitigate against getting it wrong.

**Notes**

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# The President/Principal Model in Catholic Schools: Getting It Right

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## *Part I: Getting It Right*

For the past 25 years or so, the President/Principal model has emerged as the leadership structure of choice for many Catholic schools—and for good reason. In this powerful model, executive functions are elegantly aligned around two distinct leadership profiles: the outward-facing entrepreneur and institution-builder (President), and the inward-facing academician and champion of teaching, learning, and best practice (Principal). If done right, this collaborative model not only enables a much-needed expansion of the potential leadership pool for Catholic schools but allows greater focus on the things that matter—the institutional difference-makers and drivers of success.

For many Catholic schools, especially those challenged by the intractable market forces threatening their traditional ways of doing business, adopting the President/Principal model was to be the silver bullet, the vehicle that would deliver transformational change and new and more robust business models. Understandably, the race to convert was dramatic, widespread, and full of great expectations. It is estimated that in 1992, 20% of Catholic secondary schools had adopted the model; today, roughly 56% of the 1,200 Catholic secondary schools operate within the President/Principal model.

For most Catholic schools, the model seems to be working fine, as evidenced by recent leadership surveys. All 62 schools in the prominent Jesuit Secondary Network (JSN) have adopted the model and report largely favorable results. Unfortunately, for a number of Catholic schools, the promise of the model has yet to be realized. Some schools have collapsed the structure entirely and returned to the traditional all-in-one model of a Head of School.

For a smaller number of other schools, the results seem worse. From numerous conversations and anecdotal feedback, it appears that a number of schools that converted to the new paradigm feel dissatisfied, discouraged, and trapped in transition: inert, dismayed, and unable to move forward or backwards. I am reminded of Matthew Arnold, who described his forlorn experience in the Victorian age as “Wandering between two worlds—one dead, the other powerless to be born.” This is the troubling no-man’s land where a number of dispirited Catholic schools seem to find themselves today. This is a group of schools I worry most about. If they quit the model and revert to more traditional leadership paradigms, we will doubtless shrink the market for promising leaders coming from other mission-driven sectors and run the risk of more Catholic school closings.

Let me share a couple of experiences that may be instructive of this conversion challenge.

Over the past few years, I have had an opportunity to work with several Catholic schools struggling with the President/Principal model. Two in particular come to mind, both having to do with faulty execution. In one case there was an obvious error in the hiring process, and the school recruited a President who was more suited to the Principal role. This is a common failure of governing boards and search committees and not the fault of the model itself. Since leaders tend to do what they know how to do—regardless of what’s written in the job description!—this recruiting failure resulted in the school having, effectively, two Principals occupying the same space, but with different titles. The results were quite predictable. Instead of capitalizing on the synergies inherent in having complementary skill sets at the top of the organization, the executive suite was marred by bitter conflict and messy turf battles, to say nothing of the many missed opportunities and lost confidence. After considerable discussion and consideration, including the possibility of returning to the traditional Head of School model, the search for a new President was launched and order restored, but not before the damage was done to the morale and confidence of the administration.

The second situation was more complicated and potentially more insidious in its impact on the school. This involved an outstanding Catholic secondary school that was two years into the process of converting to the President/Principal model. A dynamic new President—also an alum and former trustee of the school—was hired from the private sector to capitalize on the opportunity and develop a bold new vision for the school. He brings impressive credentials as a corporate leader,

along with passion for Catholic education and a trustee's keen perspective on school operations. He is also a very good person who loves the school and has given lots of time, money, and influential connections. We were brought in to conduct the search for a new Principal. During our site visit (in which we engage with key constituents at the front end of the search), we met with dozens of people including faculty, staff, students, parents, and alumni. We were surprised—if not shocked—by the level of ignorance about the President/Principal model and the hostility toward the President “function”—not necessarily toward the person, but toward the function itself. We were not expecting this. Clearly, the President/Principal concept had not been properly explained when introduced, and two years into the conversion process harsh but erroneous opinions had spread throughout the campus and hardened into conventional wisdom. Some well-intentioned and dedicated faculty were dismissive of the President function entirely and felt it was irrelevant to the classroom and their important priorities as teachers. They did not see any connection whatsoever with the student experience and were politely suspicious of unexpressed intentions. Some in the community regarded the President function as a superfluous appendage, an unnecessary and extravagant expense diverting much-needed resources from more worthy uses. As one long-term faculty member stated privately, “It makes me wonder what our trustees are thinking and how this new leadership structure might impact our priorities as a school.” The net effect of these unfortunate misunderstandings is an institution disengaged from the aspirations of the President and the trustees and a community failing to leverage its enormous goodwill in helping to take this fine school forward.

Those are just two recent examples, but they may be representative of similar challenges confronted by other Catholic schools struggling with the model.

Much has been written about the President/Principal model over the last 20 years, and some of it involves meticulous surveys and research-based findings, which are immensely helpful and worthy of examination. With genuine appreciation for these thoughtful studies, let me offer a different perspective and invite a new online conversation to take place. I come at this important issue from a practitioner's point of view, as a former college president and Catholic school president (operating in the President/Principal model) and current executive search consultant overseeing the Catholic Schools practice at Carney, Sandoe & Associates. There may be nothing new or useful in my observations, but I offer them collegially and respectfully, and in the spirit of Wallace Stevens who once referred to such musings as “An ancient aspect touching a new mind.”

I am also going to focus my remarks primarily on the President function, since that's the locus of greatest risk, challenge, and disruption. It has been my experience that the chief executive function in Catholic schools today—regardless of the particular leadership model or whether it's called President, Head of School, or Principal—is in a dynamic and perilous state of change and is still evolving and struggling to find its way in this increasingly threatening and rapidly changing environment. The “old” Catholic school leadership profile—based primarily on mission effectiveness, maintaining business as usual, and sound operational management—is no longer sufficient, and new entrepreneurial models are still emerging and trying to prove themselves. Furthermore, as a search consultant, I can confirm that the career pathways likely to offer the greatest promise of success in this new Catholic school leadership role are also still unknown and lacking coherence and reliability. At this time, the hiring process is often largely intuitive and involves a considerable leap of faith—by both parties.

## **Part II: Get the Hiring Right**

Jim Collins got it right when he wrote that all great institutions get the right people on the bus and put them in the right seats. This is particularly pertinent for Catholic schools operating in the President/Principal model. The most egregious mistake schools can make is to assume that the presidency is essentially the Principal function taken to a higher level — a kind of “Principal plus.” Although this is often the comfortable default choice of search committees, it signals a failed search right from the start. The difference between the two functions is not a difference in *degree* but a difference in *kind*. The presidency of a Catholic school requires an entrepreneurial leader with passion for mission who can envision new possibilities, create an appropriate sense of urgency in the community, and make great things happen. The unique duality of the leadership structure in the President/Principal Model also necessitates that the President be intrinsically and genuinely “collaborative.” S/he needs to share the podium, spread the recognition, and defer collegially to his/her partnering Principal in matters outside his/her jurisdiction. As I have suggested in another post, effective Catholic school chief executives are also humble servant leaders who see opportunities in current threats and ride inflection points to bold new heights. I often describe them as “generative,” because they have a unique ability to see excitement and potential where others see only sameness and quiescence—like the sculptor who sees wondrous possibilities in a simple block of granite.

Defining the right profile is only the beginning of the hiring process. Once you've achieved consensus around this entrepreneurial and collaborative profile, you need to identify and recruit the President. Where will you find such an exceptional leader? Where will you search? This is where the going gets tough. And here is the inconvenient truth: *According to recent accounts, only 22% of Americans self-identify as practicing Catholic, and this number may be declining.* If hiring a practicing Catholic is a requirement for your school, you begin your search by eliminating 78% of the potential population in the country. In addition, as suggested earlier, there is currently no established, reliable career pathway that leads to the presidency of a Catholic school. The success models are still unfolding in this new and rapidly evolving leadership environment, and more data is needed before we can identify reliable patterns and successful profiles. We know for certain that the presidency pathway doesn't necessarily flow through the Principal function or through Advancement, Admissions, or Financial Affairs. Those are not necessarily fruitful places to look. It doesn't necessarily flow through public schools or charter schools or arch/dioceses either. You may find the right mission-driven leader for your school in a Catholic foundation, association, or charity. You may even find him/her in a higher education setting or, in rare instances, in the corporate world. You may find him/her in any or all of the above. Or not at all.

As a result, your search plan is critically important and must be creative, multi-faceted, and *asymmetrical*. And you must execute with discipline and persistence in order to maximize your chances of success. I wish it were simpler, but this is the harsh reality of Catholic school leadership searches today. Getting it right is never easy, and not taking the time to do so can often lead to mistakes.

### ***Part III: Get the Messaging Right***

As demonstrated in the recent anecdotes mentioned in prior posts, it is a mistake to assume your stakeholders understand the President/Principal model. In fact, you would be well advised to assume the opposite. You will therefore need to take responsibility for ensuring that your community understands the model and its powerful impact on the school. Frankly, I am continually amazed by the absence of job descriptions in the leadership drop-downs on Catholic school web sites. There is seldom any mention of what the President does or the singular importance of that role. The same holds true for the Principal function. The assumption seems to be that everyone already knows. In the absence of any clear

articulation of duties, however, constituents will write their own mental versions—and they will often be stubbornly wrong and act on any false assumptions they may have concocted.

I would suggest that schools operating in the President/Principal model be especially mindful of the need to include job descriptions and organization charts in most if not all school publications and certainly on their web sites. I would also recommend including a statement of philosophy around the President/Principal model itself and why Catholic schools in growing numbers are adopting the strategy. Finally, I would also ask the President and the Principal to adopt one of Stephen Covey's preferred "habits" and draft separate *mission statements* describing the work they do and how the model creates a compelling *partnership* involving their two leadership functions. The two roles are purposefully aligned to complement each other and create potential synergies. These mission statements may evolve over time, but this reflective exercise will create an important conversation between the two partners and allow for discernment and discovery by each. They will also educate the board and prepare trustees to represent the model to constituents. If done well, mission statements can also animate job descriptions and bring the functions to life for the community.

One final note on messaging: It will be important for the President to demonstrate in his/her mission statement how the work s/he does impacts *all* aspects of school operations, including the classroom and athletic fields, mission effectiveness, and family engagement. *S/he does not necessarily "do" some of this work, but s/he "inspires" the work, sets the tone and agenda, and enables resources to be appropriately allocated.* The President is not irrelevant to the student experience; rather, s/he is essential to its vitality. The President's role is not about power or dominance per se but a unique privilege afforded by the model. The President's role has been purposefully carved out to enable extraordinary focus on the things that matter. This is the right message from a servant leader with Catholic values. S/he has been given the privilege of assuming this role, for which s/he is honored and grateful. What a blessing!

#### **Part IV: Get the Doing Right**

And finally we get to the work itself, the Doing. There is obviously no prescription for leadership in action, and there are many ways to go about the business of leading a Catholic school effectively. It is my belief that

if we have gotten the hiring and messaging right, the doing will take care of itself. Like Robert Frost's metaphorical block of ice on a hot stove, it should "ride on its own melting." This is not rocket science, and effective Catholic school leaders don't need to be told how to manage their time or prioritize their duties. That said, the President should always be mindful of the political realities of his situation and understand that skeptics abound—and new ones arrive with each entering class. In the President/Principal model, the President owns the responsibility of continuously *proving the concept* and providing ongoing evidence of the efficacy and added value benefits of his/her position. No one else can do it.

Let me offer two pragmatic ideas that may be helpful in guiding the President's actions:

**Calendar Management.** Remarkably, one of the extraordinary privileges of the model is that the President has virtually *complete control over his/her schedule*. Excepting embedded board commitments and other celebratory duties, the President is the only person on campus whose schedule is not driven by the relentless quotidian of school life. I don't mean to oversimplify, but this is true. S/he is not subject to endless class schedules and deadlines, the unexpected and often custodial disruptions of daily habit, or the zealous press of the adolescent experience. This is an extraordinary gift and privilege. How the President chooses to spend time—where, when, and with whom—will define his/her presidency and prove or disprove the concept of the President/Principal model's efficacy. This involves a delicate balancing act for the President. S/he needs to be present but not intrusive, and by his/her presence give credence and importance to the things that matter, i.e., the quality of the student experience and ensuring the future of the school, all of which stands, in a Catholic school especially, on a bedrock of enduring mission. To fulfill the promise of the model, the President needs to honor the importance of the student experience while reserving sufficient time for the longer-term institution-building and visioning activities that are essential to his/her duties. Time is a non-renewable and precious resource. The freedom to choose how to spend it is both a burden and a blessing of the model.

**The Janus Pose.** In ancient Roman mythology, Janus is the famous double-facing god of beginnings and transitions, looking forward and backward at the same time. This may be instructive of how the President might position his/her priorities. While the President is commonly regarded as the outward-facing leader in the model and the Principal the inward facing counterpart, I would suggest that the President consider the following pose:



*Be outwardly facing but inwardly grounded.*

In other words, the President needs to be grounded in the things that matter while delivering his/her message to various constituencies. Fundraising is a good example of how this might be accomplished. One of the President's most important duties is securing all resources necessary to sustain the mission and ensure the future of the school. To create a robust and sustainable fundraising platform, the President will need to begin the long-term process of *creating a culture of philanthropy* at the school in which giving becomes everyone's responsibility and permeates all constituent groups. As part of his/her "inwardly grounded" practice, the President should make it clear that fundraising is most effective when the strategy is constructed *from the inside out*, not the top down, beginning with the classroom and the overall quality of the student experience. High-performing teaching and learning, in an environment of best practice and high expectations, is the compelling value proposition advanced to donors. This is a big idea that will attract big gifts, and it is grounded in the vital work that teachers, coaches, and counselors do. By linking the classroom with fundraising, this strategy will also conveniently and powerfully align the duties of the President and the Principal while potentially illuminating the synergies inherent in the model. There is no better way to get the doing right.

For schools that are feeling trapped in transition or questioning whether to revert or stay the course, I hope you will find in this analysis some reasons for optimism.

Catholic schools are vital to the communities they serve, and the President/Principal model provides the greatest opportunity for success while opening recruitment channels to entrepreneurial leaders from other mission-driven sectors who wish to bring their passion and talents to the important work of leading Catholic schools. There is time yet to get it right.

Thomas Edison knew a thing or two about false starts and repeated disappointments. It is said he tried nearly one thousand times before finally getting the light bulb to work. Drawing on his experience as an inventor with immense grit and persistence, Edison is said to have remarked, *"One of life's great tragedies involve people who didn't know how close they were to success...when they gave up."*

Stay the course, dear colleagues. You may be closer than you think to getting it right.

## Notes

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# Vetting the Faith Component: A Process of Discovery and Discernment

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In a recent post, I discussed the definitional challenges concerning what it means to be a “practicing Catholic.” While Catholic school search committees are quick to insist that this attribute is an indispensable Head of School criterion, they often struggle to define exactly what it means. When asked, the eyes tend to glaze over, and a great silence envelopes the conversation. In most cases, no one had ever presumed to ask such a provocative question; it was assumed that the answer was forever self-evident. After halting efforts to arrive at an acceptable definition, though, it soon becomes clear that there is no true consensus around the definition of practicing Catholic—although there IS absolute consensus regarding its necessity.

Once we are clear about the spiritual requirement—however elusive the definition—the search challenge soon shifts to the vetting process itself, and to the strategies for ensuring that candidates under consideration meet the faith standard. The key question becomes, *“What can we do as consultants and search committees to avoid getting this wrong?”* *What should we be looking for to affirm authentic belief and practice?* Since there is no reliable glimpse into a person’s soul, we need to rely primarily on an intuitive, probative process to ensure a successful assessment. An especially complicating factor in making this judgment today is that there are currently 40 million people in the U.S. who self-identify as “former Catholics”—that’s roughly 1 in 8 Americans. How easy it would be for ambitious candidates to suddenly become practicing Catholics again when faced with the lure of a compelling leadership opportunity! This is hardly a formula for successful Catholic school leadership.

With a repeated caveat that there are no guarantees of getting this right, the Catholic Schools Practice at CS&A follows a three-part vetting strategy to minimize the chances of error:

## 1. Direct and Early Questioning

From the very first conversation we have with candidates, we raise this practicing Catholic matter as a prominent concern, and we make it clear that the Head of School “*must be prepared to assume the spiritual leadership of the community.*” This is not a marginal aspect of the job but core to the duties. It cannot be delegated to campus ministry or outsourced to a local pastor or religious congregation. It must be insourced and deeply felt and lived by the Head of School. We will ask if the person is a practicing Catholic and what that means to his/her family. Candidates will often stumble and deliver an unusually inelegant response. This is okay—at least for now. At this point, we are not concerned about vetting so much as we are about making it clear that this is serious business. We will also suggest that candidates familiarize themselves with the school’s mission and charism and begin to internalize what it might mean to lead this school and singularly own the responsibility for exemplifying those values in their daily practice. Once we plant the seeds of certainty, we hope for more clarity and articulation as the process moves forward. Our goal during this initial conversation is simple but dispositive: We want serious candidates to feel welcomed and valued. But we also want them to reflect seriously on the matter and to self-select in or self-select out. And the sooner the better—for themselves and for the school.

## 2. Third-Party Validation

This is one of the most effective and reliable strategies in the vetting process. All Head of School candidates are required to submit at least five references, and often more. In our Catholic Schools Practice, we follow an eight-question conversation with referees including this critical question, which is generally posed mid-interview, once rapport and trust have been established: “*As Head of this school, John will be expected to assume the spiritual leadership of the community. Have you seen evidence that John is ready for this significant responsibility?*” I cannot emphasize enough how important this question is, and how much we learn about a candidate and his/her family. Fortunately, more often than not we learn wonderful things about our candidates, affirming their goodness and ethical qualities and their genuine passion for mission. However, if after three or four reference checks no one has seen evidence of a spiritual component, it isn’t necessarily a deal breaker...but the yellow light is flashing bright and hard. In many cases, the referee returns to the candidate and mentions this conversation, further reinforcing our serious focus on the faith component.

## 3. Leadership Testimonial

All Catholic schools are by definition mission-driven. Many private Catho-

lic schools are sponsored by religious congregations, such as the Jesuits, Dominicans, Sisters of the Sacred Heart, Christian Brothers, etc., and they adopt the charism of the founding leader as their guiding principles. For the Sacred Heart schools it's the Goals & Criteria; for the Jesuits it's "Cura Personalis;" for the Christian Brothers it's The Essential Elements. Diocesan schools are often inspired by saints such as Pope John Paul II, and many adopt the bold vision or mission statement of the saint such as JP II's declaration that "Faith leads us beyond ourselves." These core principles are foundational to the culture and beliefs of these institutions and must infuse these communities with their daily presence and traditions. As a result, an effective last step in the vetting process provides candidates with an opportunity to demonstrate how their leadership would be inspired by these core values. We suggest to search committees that all semi-finalists be given an assignment and plenty of time to ponder and prepare. The assignment: *"As part of your interview, please be prepared to discuss how your leadership of our school might be influenced by our core beliefs and founding principles."* This will not only demonstrate seriousness of purpose and indicate candidate preparation, but it will also provide an earnest glimpse into a candidate's spiritual life and his or her readiness to lead your school.

We believe our three-part vetting process is prudent and likely to deliver the truth. It is intentionally respectful but diligent, and it treats candidates with dignity and great appreciation for their service to Catholic schools. There is no attempt to embarrass or humiliate, but rather to illuminate and reveal a spiritual readiness to lead. A derivative benefit of enormous value to Catholic schools is that this process, over time, also *engenders true discernment on the part of candidates*. For the several months that they are engaged in the process, candidates are encouraged to reflect on their values and priorities, and perhaps to renew their faith and find their pastoral voice. They grow appreciably in self-awareness and determination, eager to answer the call and lead. As T.S. Eliot once said, "You never know the egg you are sitting on until the shell breaks." Sometimes great Catholic school leaders emerge from this fragile and life-affirming process: surprised, but reborn in their beliefs and ready to inspire.

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