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Effective Catholic Health Care Sponsors Are Elders, Guides and Guardians

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Health care systems in the United States have leadership structures comprised of boards and management. Most Catholic health care systems are unique in that they include another layer of leadership called a "public juridic person" or, in common parlance, the "sponsors." This is the entity — established under the Church's *Code of Canon Law* — that has the ultimate responsibility for sponsoring a Catholic health system in the name of the Church.¹

Because the form of sponsorship that includes both sisters and laypersons is a relatively new development, it is understandable that a health system's board, management and sponsors may not fully understand and respect one another's distinct, but complementary, responsibilities. When misunderstandings occur, serious tensions can develop within a system's leadership. From our experiences, we offer suggestions on how sponsors — while working with board and management — can

fulfill their day-to-day responsibilities to further a Catholic health system's mission, sustainability and even growth.

THE CHALLENGE

When one becomes a sponsor of a Catholic ministry, no instruction booklet comes with the appointment, and canonical statutes and bylaws provide only the bare bones of the structure. CHA does offer excellent high-level information around this topic, however, these resources do not offer specific practical guidance on how sponsors can be effective in their day-to-day work. Before assuming their new role, most sponsors have served in management or on the board of a Catholic ministry. They have experience acting in those roles, but being a sponsor is different.



Illustration by Alice Mollon

Part of the challenge is illustrated by how ministries structure the relationship between their sponsors and governing boards. Some have one set of people who serve as sponsors and a completely different set for their governing board. Other ministries have some of their sponsors who also serve on their governing board. A third approach has the same people serving on both, but who take separate action when acting as sponsors or as a board.

The main source of the challenge, however, is that sponsors, board and management share overlapping responsibilities. For example, while the board and management have responsibility for furthering a Catholic health system's mission and values, ensuring its faithfulness to these is the sponsor's ultimate accountability. Although some sponsors have final approval on appointing the governing board and chief

executive, as well as other major actions, management and the board also have responsibility in these areas.

There is no simple or best way to fulfill these overlapping accountabilities. Sponsors, board and management often have to feel their way into fulfilling their responsibilities while respecting the responsibilities of the other two bodies. Nevertheless, some practices have minimized friction and misunderstanding while fostering healthy, productive relationships. These practices depend on sponsors fulfilling three fundamental roles: First, sponsors serve as "elders," who offer wisdom and support; second, sponsors serve as "guides," who help the ministry discern appropriate courses of action; and, finally, sponsors are "guardians," who hold reserved powers to protect the ministry from straying from its Catholic identity, mission and values. In exercising these roles, the sponsors act not just as individuals, but as a discerning, prayerful community.

SPONSORS AS ELDERS

Respected elders within a community are considered wisdom figures, and sponsors are expected to serve as a council of elders. Thus, their primary influence comes from their role as trusted elders who share their deep understanding of the ministry, its heritage and spiritual traditions, and who bring wisdom to the challenges it faces. That is a tall order, requiring self-awareness, practical wisdom, organizational savvy and mature spirituality. The history of every ministry is filled with wisdom figures who have had those qualities. Today's challenge is to identify and form sponsors with the same attributes. Being a trusted elder is the foundation for being an effective sponsor.

Elders can calm turbulent situations. They can place challenges and struggles in the context of the big picture. They can take the long view. They demonstrate understanding and compassion. They offer perspective and vision, hope and joy. They foster a culture of trust and often do not need to use words to influence others — their presence speaks. But before saying a word, wise elders are careful to ask themselves, "How will our words or actions be interpreted? Will they be construed as helpful and constructive, or as an inappropriate intrusion into operations or governance?"

SPONSORS AS GUIDES

Sponsors act as guides when they engage in regular dialogue with the board and

management in formal and informal settings. They listen carefully, ask questions that show their understanding of issues and demonstrate their support of the board and management when addressing them. They also offer their perspective. When sponsors fulfill their roles as elders and guides, they empower the board and management to fulfill their responsibilities. As elders and guides, sponsors foster relationships marked by respect, trust and harmony.

Effective health care ministries will always ensure that differences of opinion among sponsors, board and management are resolved before final decisions are reached, using formal discernment processes when appropriate.² Healthy communication patterns foster trusting relationships and enable everyone to be on the same page.

In the shared governance model of Catholic ministries, both the governing board and management team are responsible for ensuring that the ministry's strategy, policies and actions further its mission and values. While the sponsors have ultimate accountability for mission and values, they must be careful not to disempower the board and management from their responsibilities. Sponsors are not like helicopter parents hovering from above to ensure that those below don't make a mistake. They are most effective when they support, influence and help guide those closest to where decisions are implemented.

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SPONSORS AS GUARDIANS

Fortunately, something rarely goes seriously wrong. When it does, though, it occurs when some combination of senior executives and the board decides to take an action that the sponsors judge to be incompatible with the ministry's mission or values. The sponsors' attempts to guide the process toward a different outcome have failed. When this occurs, the sponsors must act as guardians and use their reserved powers to overrule the proposed decision. In a few cases, sponsors have gone further, using their power to remove the ministry's chief executive and board.

Although it may be necessary, the exercise of reserved powers over major decisions or the chief executive and board in such extreme cases comes at a steep cost to

relationships and the ministry. It also indicates some failure in the selection and formation of senior executives and board or a failure to develop the relationships and communication patterns that would enable sponsors to influence decisions before reaching an impasse.

Sponsors have to attend to the ministry's fiscal health and its services, its relationships with church officials and its ethics. However, to fulfill their roles as elders and guides and to avoid being forced to act as guardians, they must also focus on three key areas. The first is their presence within the ministry, especially with senior executives and the governing board. The second is how the ministry's processes for selecting, evaluating and compensating its people align with its mission and values. And the third is how effective the ministry's programs are in orienting and forming its people, particularly its leaders.

BUILDING PRESENCE

To be influential as elders and guides, the sponsors must have an effective presence in the ministry. They must be seen and heard. In large ministries with extended geography, that is difficult, and sponsors have to focus on how and where they can be most influential.

At the center of the sponsors' circle of influence is the executive team and governing board. Sponsors' relationships with these two groups are critical. For example, if each group addresses important matters in its own silo and only afterward communicates with the two other groups, distrust inevitably results in questions like: Why are we learning about this after their minds are made up? How did they reach that conclusion? Don't they respect our role?

On the other hand, when the sponsors, board and executive team communicate regularly and examine important issues together, each person can ask questions, raise concerns and offer comments from their perspective. The resulting dialogue builds understanding and respect for their different roles and points of view. In open dialogue, the sponsors are not present as overseers controlling the conversation but as colleagues who are learning and contributing, while respecting the role of others.

The ability to process critical issues effectively, in turn, depends on the trust that is built from being together regularly in meetings and social settings before having to

address tough questions. Periodic retreats with the sponsors, board and executive team offer unique opportunities to build relationships, understanding and communication, especially when retreats focus on big-picture topics like the ministry's heritage and vision for the future. The sponsors' presence in such forums is vital.

To be present within the larger ministry, sponsors should participate in formation programs and celebrations such as anniversaries, retirements and missioning ceremonies (a ceremony to mark the start of a role) to highlight the ministry's heritage and mission. In such settings, employees can experience them as elders through their presence and the messages they deliver.

FINDING THE RIGHT PEOPLE

The ministry's mission can only come alive through its people. With the right people, the mission and values will thrive. Without this, mission statements and written policies won't make a difference. Inviting the right people to serve in the ministry is the starting point and foundation for the ministry's success. Its hiring processes must confirm that those who join the ministry are not just technically competent but are also aligned with its mission and values.

After hiring, the evaluation process must include an assessment of whether an employee's words and actions show ongoing commitment to the mission and values. In addition, the ministry's program for compensating people, particularly executives, must reinforce that alignment. Management is directly responsible for personnel practices, but sponsors must ensure the processes further its mission and values.

Three groups of people who serve in particularly important mission-related roles are mission leaders, those who offer ethics consultation and spiritual care providers. While respecting management's responsibility for hiring and overseeing these roles, sponsors must ensure that their numbers are adequate for the ministry's needs and that their competency matches their responsibilities. CHA's resources provide valuable information to help sponsors and others have the information they need about the roles and needed skills of these mission-critical leaders.³

ENSURING EFFECTIVE FORMATION PROGRAMS

The third area for sponsors' special attention is formation in mission and ministry. As sponsorship has been transferred from religious congregations to public juridic

persons, a clear understanding has emerged that formation is essential if Catholic health care is to remain a Catholic ministry, not just a business.

Management is responsible for the development and implementation of formation programs. Nevertheless, sponsors have the responsibility to ensure that their ministry's formation programs have appropriate structure, content, funding and participation. CHA has produced valuable guidelines on what is needed for the effective formation of front-line associates, managers, executives, clinicians, boards and sponsors that can help sponsors assess the effectiveness of their formation programs.⁴

CONCLUSION

The move from sponsorship by religious congregations to juridic persons is still relatively new.⁵ It is to be expected that sponsors, boards and management teams will sometimes experience difficulties in fulfilling their overlapping responsibilities. However, relationships marked by mutual understanding, patience, respect and trust will go a long way toward maximizing smooth functioning and minimizing the bumps.

The ever-changing environment in health care may require the ministry to adapt and evolve its services, perhaps even ending some. Yet, if the sponsors ensure that the ministry remains faithful to its mission and its actions match its values, the mission will continue, regardless of the form the ministry may take. When this occurs, the sponsors will have fulfilled their charge as good and faithful servants.

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NOTES

1. See: *A Guide to Understanding Public Juridic Persons in the Catholic Health Ministry* (St. Louis: Catholic Health Association, 2012),

<https://www.chausa.org/store/products/product?id=4948>. This newer form of sponsorship is sometimes referred to as a "ministerial juridic person" to distinguish it from the public juridic persons that are religious congregations.

2. For example, see: *Listening and Cooperating with the Spirit: CHA Discernment Model & Facilitator Guide* (St. Louis: Catholic Health Association),

<https://www.chausa.org/store/products/product?id=4650>.

3. For example, see the following resources: "The Mission Leader Competency Model," Catholic Health Association, <https://www.chausa.org/mission/mission-leader-competencies>; "Qualifications and Competencies for Ethicists in Catholic Health Care," Catholic Health Association,

<https://www.chausa.org/careers/careers-in-ethics/qualifications-and-competencies-for-ethicists-in-catholic-health-care>.

4. CHA resources on formation for different ministry leaders are available at <https://www.chausa.org/ministry-formation>. The competencies needed by those who direct formation programs can be found at <https://www.chausa.org/cha-ministry-formation/leadership-competencies> (CHA website login required to access).

5. Fr. Charles Bouchard, OP, STD, "The Evolution of Sponsorship Models: A Progress Report," *Health Progress* 104, no. 1 (Winter 2023): 38-44.

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