SPONSORSHIP

as a Bridge



Introduction

tories are key ways to keep alive a people, a vision, a dream. We tell stories to help people know who we are; where we came from; and where we are going. There are individual stories and group stories. When a community tells its story, it is never singular; rather each storyteller relates the facts from her/his perspective. Each of the particular insights helps us to understand the whole.

Storytelling is what these essays you will be reading are all about. They tell the story of the Sisters, Servants of the Immaculate Heart of Mary (IHM) of Monroe, Michigan, and the values we have tried to integrate into our sponsored educational institutions. We are telling the story primarily to you, the board members, administrators, faculty and staff of these institutions, so that you will get to know us better and join us in keeping our vision alive.

Over the last decade, the IHM Mission Integration Sponsorship Committee (MISC) has continually asked itself how we can make the IHM values come alive in our institutions now that there are fewer IHM Sisters. In the past, parents and students attending IHM schools could easily say, "it is an IHM school" and have a sense of what that meant. As times changed and fewer IHM Sisters were visibly present in these schools, we found ourselves needing to be clear about what makes this school an IHM school.

We formulated seven educational belief statements that seemed to capture this spirit; they follow this introduction. But statements that exist only on a page don't come alive. They need a story to give them flesh, to make connections and to convey the energy necessary to keep living them into the future.

"We are telling the story primarily to **you** ..."

To try to bring these beliefs to life, the MISC invited some IHM Sisters to be part of a collaborative effort to write about key belief statements. We wanted the narrative to be historical and interpreted through each author's unique lens. As a writing group, we reviewed each other's essays multiple times, checking for historical accuracy and making sure the interpretation offered would resonate with the congregation.

We are pleased to offer these essays as a significant resource for you as you assume greater responsibility in living out the IHM vision in your institution. Although each essay is published separately, we hope you will find them interesting enough to read many, if not most, of them. Each essay tells its own story but all the essays tell a much fuller story of how IHM evolved and how it has and is affecting all of you in our sponsored schools.

We look forward to talking about the essays with you and would suggest planning time on various meeting agendas to reflect together on the story and how it impacts you and the future of your school. These essays are an inaugural step in our committee's dream of having all current and future stakeholders in IHM institutions be so steeped in the IHM vision and so energized in living it out that the story of what makes an IHM school IHM continues well into the future.

Nancy Sylvester, IHM Chair of the Mission Integration Sponsorship Committee



Core Educational Beliefs

nspired by our founders, Theresa Maxis Duchemin and Louis Florent Gillet, the Congregation of the Sisters, Servants of the Immaculate Heart of Mary (IHMs) have served the people of God in education since 1845.

The mission of the IHM-sponsored educational institutions includes personal and social transformation, which bear witness to the liberating mission of Jesus.

We believe our sponsored institutions are partners in mission by fostering excellence in education and by living into the following deeply held beliefs:

- a commitment to the liberating mission of Jesus with special focus on those who are poor, abandoned or oppressed;
- the development of a Christian community that witnesses to a profound respect for each human being and an acceptance of all persons;
- challenging students to make decisions in the light of Gospel values and global realities;
- encouraging students to act on behalf of justice;
- a commitment to eradicate the causes of oppression and injustice through a **feminist perspective** that empowers all;
- ecological consciousness that challenges all to recognize the interconnectedness and interdependence of all Creation and nurtures relationships that protect our common home; and
- a **holistic educational process** that fosters self-motivation, flexibility and openness to change.

Sponsorship as a Bridge

Sponsorship might be considered a bridge ... a link between the hearts and dreams of the founders and the present day reality. If the bridge is sound and strong and well-maintained, people can move easily and graciously, from one side to the other.1

ntil the 1970s, being an IHM school meant being taught by the IHMs, the sisters in blue. What did the school stand for? What values guided its education? Who made decisions about the school? Such questions were never asked because the answers were embodied in the women who taught and administered these institutions. This was especially true for those schools we had built, staffed and maintained financially, emotionally and psychologically. Those were our sponsored schools.

However, following the Second Vatican Council and the decline in our membership, more lay women and men were hired to carry on the IHM tradition of education. They joined us in embodying the founding vision, the culture and educational approach that was distinctively IHM. This essay describes the *building of the bridge of sponsorship*, the nuts and bolts,

the decisions and the structures that were necessary steps on this evolutionary journey.

Religious congregations follow stages of development that are similar in all organizations. There are many studies that look at this process (Peters & Waterman, 1982; Deal & Kennedy, 1982; Schein, 1983; Schein, 1992). One talks about the initial founding stage where, with a core group of people, the founder formulates common goals and a vision. At this stage, the mission and environmental context for the organization are developed and the common history for the organization begins.² Following the founding stage, the organization continues through stages of organizational maturity.3 These stages include the second, third or fourth generation of leadership.

The period of organizational maturity is the final stage of development, when there may be generations separating the current leadership and the founder. This stage can look dysfunctional, as there is a strong culture yet changes within the organization may appear to shake the foundation of the organization. There is a desire to remain loyal to the founder and also the need to make significant changes that reflect changes in the environment or climate that surround the organization. At this stage, there have been changes in leadership and the effect of environmental constraints affects the organization.

These stages of development have mirrored the evolution of sponsorship, the link between the "hearts and dreams of the founders and the present day realities."

The stages of another model of organizational development, perhaps a model for the development of the concept of sponsorship, include the family business model, the franchise model, the partnership model and the next generation. In the first wave, the family business model, there is a lack of differentiation of the roles from the convent to the school. The second stage, the franchise model, when the original idea or organization is replicated with the same vision and values, was not as evident in religious congregations as in other organizations. In response to the call of the Second Vatican Council, many religious branched out to different

ministries, leaving a congregational presence in sponsored schools to a minimum. It was during this time that the congregations were challenged to see how to maintain their schools as viable institutions and develop the governance structures necessary to maintain them. The partnership model emerged next, with greater lay involvement in the institutions that had been solely staffed and governed by members of the religious institutes. The current reality is that of preparing for the next generation, i.e., what happens after we're gone?

This history of sponsorship within the IHM congregation follows a path not unlike that of organizations and other religious communities. We have identified three eras of our evolving understanding of sponsorship, a valued relationship we hold with our schools.



First Era - Founding of the Organization

he relationship between the IHM Sisters and educational institutions began in 1846 when co-founders of the IHM congregation, Mother Theresa Maxis Duchemin and Fr. Louis Florent Gillet, CSsR, collaborated to open the Young Ladies Academy in Monroe, Mich., later named St. Mary Academy. From those early days and for approximately 13 decades, the presence and ministry of IHMs in educational institutions were practically synonymous with the IHM identity. This period could be referred to as the time of the "family business." Practically, this meant that the IHM Sisters administered and staffed schools, a 24/7 presence in both diocesan elementary and secondary schools and in institutions founded by the IHM congregation.

The IHM congregation responded to the invitation of various bishops to serve at a significant number of schools in the Monroe/ Detroit areas as well as at parishes in Ohio and other areas. However, the canonical sponsorship of schools was limited over the years to a few institutions. Canonical sponsorship is described as a "formal relationship between a recognized Catholic organization and a legally formed entity, entered into for the sake of promoting and sustaining the Church's mission in the world."5

St. Mary Academy, Monroe, Mich. (1846), Hall of the Divine Child, Monroe, Mich. (1918), St. Mary's College, Monroe, Mich. – later named Marygrove College and relocated to Detroit – (1910), Immaculata High School, Detroit (1941), Marian High School, Bloomfield Hills, Mich., (1959) and Immaculate Heart of Mary High School, Westchester, Ill. (1959), were schools the IHM congregation financed, staffed and retained a unique canonical relationship with as our sponsored institutions.



In a way similar to the founding of any organization, the IHM congregation was the creator of symbols, ideologies, beliefs, rituals and values that were the basis of the organizational or school culture. The culture within the schools emerged from the beliefs, values and assumptions of the members of the congregation. Thus, the presence of IHM Sisters in administrative and teaching roles in these initial days was critical in establishing the schools' foundation for the future. While the IHM congregation staffed a great number of schools, the congregation took a special interest in the "sponsored" schools.

In these schools, there was a special effort to ensure that the IHM spirit was present. Assigning the sisters to minister at the various institutions was done each year, with particular emphasis on placing sisters in the institutions sponsored by the IHM congregation.

During these early years, the issue of governance was not the foremost concern. In these sponsored schools, the governance structure was the same as the administrative structure and members of the IHM congregation maintained these roles. It was not unusual for decisions to be made in the local community of IHM Sisters regarding policies for the school.

Second Era - Maintaining the Family Treasure in the Midst of Challenges

hile the founder plays a significant role in the early development of an organization, at later stages, the role changes. During the later stages of development, members of the organization may look to the founder to follow a certain path. While the "status quo" may be desired, the organization in reality is moving to another phase of development. During this next phase, the culture of the organization may still be reflective of the founder and there are feelings of loyalty; yet it is time for a change. It may appear during this time that the foundation is shaken. With the founder no longer present

and new leadership emerging, changes may appear to move away from the initial purpose.

A significant event of this era for IHMs and the entire Church was the Second Vatican Council (1962-1965). The Second Vatican Council, convened by Pope John XXIII, was called to create an environment of dialogue where the Church would engage with issues of the modern world. The call of the Council focused on responding to the hopes and sorrows of all God's people, inviting religious to consider ministries beyond formal education. The Council is often credited with shaping the Catholic Church of today.

During the post-Vatican years, members of religious communities were exploring and developing alternative ministries, particularly outside the field of formal education. The Second Vatican Council brought about a new role for the laity, with the emphasis on the belief that all who are baptized share in the responsibility to carry on the work of God. During this time, Catholic colleges especially increased the number of laity in roles of governance within the institutions. This included the governing boards as well as separate incorporation of institutions. Catholic elementary and secondary schools were not far behind in instituting such changes.

Other changes provoked reconsideration of a congregation's involvement in their institutions. The Catholic school system was founded to primarily address the needs of Catholic immigrants, who for the most part were uneducated and of the working class. By the time of Vatican II, those Catholics were now educated and were part of the growing middle class.

One of the most significant events during this time was the white flight by many Catholics to the suburbs, thereby affecting the stability of urban schools as well as growth in suburban parishes and schools. At the same time, federal and state agencies began to issue more requirements that affected Catholic schools. These schools moved from an internal system of monitoring and accountability to an external

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one. While not directly accountable to the state, Catholic schools began to consider some form of state support, which resulted in a need for some reporting systems to the state. Catholic schools, at this point, were not as financially solvent as they had been in the past. With the increased number of lay faculty members, there was in increase in salaries and benefits. This resulted in increased tuition and the need for other forms of funding, i.e., parish support and fundraising.

The factors cited above called for new conversations on sponsored institutions within religious congregations. This was particularly true for the IHM congregation. In September 1976, the elected leaders of the IHM congregation called for an evaluation of the IHM-sponsored schools in six areas: ⁶

- Education as a *ministry* implementing *To Teach as Jesus Did* with a social awareness of and outreach to the educational community;
- **2** *IHM presence*, with each sister consulted as to her motivations, feelings, ideas and hopes for the ministry;
- **3** *Professional aspects* of the school, including the curriculum, teaching methods, staff qualifications and implementation of the philosophy;
- **②** *Constituents' response* − consideration of the attitudes, values, expectations and reactions of the people from the local community including teachers, students, parents and alumnae;
- **5** Financial aspects a consideration of the past financial activity as well as projections concerning enrollment and the financial state of the institution;
- **3** Building utilization and historical consideration given to the construction of the physical plant, financing, ownership and indebtedness to the congregation.

In the process designed to study IHM schools, consideration was given to the IHM **commitment to Gospel values**, especially simplicity, justice, concern for the poor ...

This congregational evaluation also reflected the challenge given by Pope Paul VI, in his Apostolic Letter, Octogesima Adveniens (May 14, 1971). He challenged religious congregations to review their property and material resources and to divest themselves of that which was unnecessary or not in keeping with institutional simplicity. In the process designed to study IHM schools, consideration was given to the IHM commitment to Gospel values, especially simplicity, justice, concern for the poor, responsible stewardship and faithfulness to the Alphonsian heritage of service to the poor and abandoned. Consideration was also given to meeting the needs of all the people of God where IHMs serve, keeping in mind the availability of other institutions then in existence that met needs of the people once served by the IHM congregation.

The next several years brought about some significant decisions that affected IHM-sponsored institutions. Decisions were made to close the Hall of the Divine Child, Monroe (1980), Immaculata High School, Detroit (1983) and St. Mary Academy (Monroe), which joined with Monroe Catholic Central to become a new entity, St. Mary Catholic Central High School (1986), an archdiocesan school.

For the IHM institutions deemed viable, the decision was made to lease the schools (property and facilities) and move toward shared governance of the schools. In doing so, the IHM congregation made a firm commitment, in collaboration with the laity within each institution, to create structures that would continue the IHM mission. The IHM Corporation Board drafted Articles of Incorporation for each high school prior to the appointment of the trustees. Immaculate Heart of Mary High School (1991) and Marian High School (1990) were each separately incorporated; boards of trustees were established; and lease agreements with the IHM congregation were developed. These changes are reflected in the current structures. Currently, Marian High School has a two-tiered board structure, with the IHM Corporation Board having specified reserved powers. Marygrove College was separately incorporated in 1959 and the board of trustees



was established in 1969. In 1994, the Marygrove College Board of Trustees worked with the IHM Leadership Council to revise the Articles of Incorporation, establishing two classes of members of the Corporation: College Members and Council Members. The Council Members have exclusive powers as stated in the Articles of Incorporation. However, both the Council Members and College Members must agree on major changes.







Third Era - Passing on the Treasure

In 1996, with the governance structures for the IHM-sponsored institutions in place and lease agreements finalized, the IHM congregation entered into a process to renew the congregation's commitment to the IHM-sponsored institutions. In November 1996, a congregation-wide process was begun that focused on articulating the ongoing relationship of the IHM congregation with the sponsored institutions, maintaining some form of an IHM presence in the institutions and facilitating sponsorship of the IHM congregation and the sponsored institutions for the future. As a result of these conversations, the Policy on Sponsorship was developed in 1997 and included the following Belief Statements developed in 1998 and revised in 2015.

The IHM Congregation, building on legal and canonical sponsorship, commits itself to strengthening relationships of mutual respect and responsibility with its sponsored educational institutions. The Congregation will work with each of the educational institutions to develop a variety of means to enhance mutual interaction between the Congregation and the institutions, as well as among the institutions to foster greater understanding and integration of the IHM mission.

Adopted by the IHM Coordinating Council, November 1997 Revised and approved by the IHM Coordinating Council, November 2007

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ecological consciousness that challenges all to recognize the interconnectedness and interdependence of all Creation and nurtures relationships that protect our common home; and

a **holistic educational process** that fosters self-motivation, flexibility and openness to change.

- Approved by the Mission Integration Sponsorship Committee, September 15, 2015

The IHM Mission Effectiveness Committee was established in 1998 and the first Mission Effectiveness coordinators were hired. Later, this committee title was changed to Mission Integration Committee (MIC). The MIC's specific focus within each school was to develop appropriate committees to support integration of the IHM mission within the schools.

Over the years, the schools have established committees that develop means to both integrate the mission of the IHM congregation and the mission of the school into all areas of school life. Annual meetings with the presidents/principals began in June 2000.



In 2003, the MIC established the Mission Integration Review process, a formal review process intended to strengthen the partnership between the congregation and the sponsored institutions. This review ensures ongoing development and attentiveness to the IHM mission in IHM-sponsored institutions and facilitates a process of institutional self-assessment. Each IHM-sponsored educational institution participates in the review process within the six-year cycle of IHM leadership. The IHM Belief Statements serve as a framework for the Mission Integration Review. After the completion of a self-study by the institution, a review team visits the school. A final report prepared by the chairperson is sent to the administrator, the chair of the board of trustees, the IHM Mission Integration coordinators and the liaison from the Leadership Council. At the annual presidents'/principals' meeting, participants reflect on the progress of the institution since the last visitation.

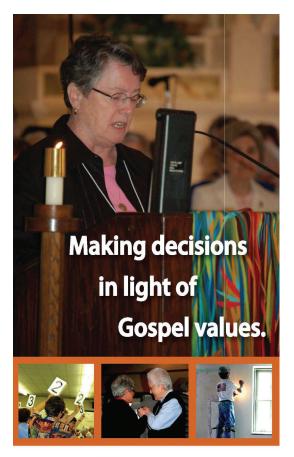
A unique opportunity for the IHM congregation to partner with three other religious congregations in establishing Our Lady of Guadalupe Middle School for Girls (OLG) in Southwest Detroit came forward from the IHM Chapter⁷ in 2000. The Chapter Directions state: "Specifically, the delegates of Chapter of 2000 recommend to the Leadership Council that the IHM Congregation join with other founding religious Congregations to co-sponsor Our Lady of Guadalupe Middle School for young women in Southwest Detroit."

Together with the Sisters of St. Joseph, Nazareth, Mich., the Religious of the Sacred Heart and the Detroit Regional Community of the Institute of the Sisters of Mercy of the Americas, Our Lady of Guadalupe opened its doors in September 2001. The sponsoring communities established a governance structure for the school, provided start-up financial support and continuing leadership in the board structure. The OLG Sponsorship Statement articulated commitment to the education of young women by promoting academic excellence and providing a private school alternative in an educationally underserved community. Members of the IHM community served in administrative and staff positions and on the board of trustees in this exciting and promising educational venture. Unfortunately, in April 2009, the enrollment was 43 girls, which did not create a viable school. Our Lady of Guadalupe closed its doors in June 2009.

In 2002–2003, initial conversations were begun with Immaculate Heart of Mary High School in Westchester, Ill., and a neighboring school, St. Joseph High School in Westchester, to consider the sustainability of Catholic high school education in the area.

The initial talks focused on how the schools could work together for young men and women to share classes and facilities while maintaining separate identity of each school. During this period the archdiocese granted permission for St. Joseph High School to become a co-educational institution.

This decision, together with the significant enrollment decline caused by shifting demographics in the area, led to the decision to close Immaculate Heart of Mary High School in June 2005 after 45 years of service to the young women of the area.





In 2007, the IHM congregation embarked on a new endeavor of co-sponsorship with the Basilian Fathers to establish Detroit Cristo Rey High School. The school opened its doors to the first class in September 2008. In this new relationship, the IHM mission continues as the school serves financially challenged and educationally underserved urban youth in Detroit. The emphasis on faith formation, moral values and service to the community is a concrete way the IHM mission continues in educational ministry in Detroit.

During this era, efforts are continuing to develop the essential element of sponsorship - that of relationship. Included in this relationship is board development, faculty in-service and providing opportunities for students to work together. This means cultivating and sustaining the mission of the IHM congregation in the context of the evolving reality of a lay-centered Church. This reflects the ongoing reality of the Church as the People of God. Sponsorship formalizes the relationship and the IHM congregation continues to pursue ways to strengthen the partnership. This includes ongoing efforts in trustee formation, development of monographs based on the belief statements and other initiatives. It is important that the sponsored institutions understand the charism of the congregation and that the congregation understands the mission of the institutions in their specific contexts, recognizing the challenges and opportunities each institution faces.



Sponsorship - Bridge to the Future

rist and foremost, the IHM congregation, as sponsor of our educational institutions, is an "interpreter of the institution's mission." This mission, while reflecting the unique characteristics of the school, embodies the mission of the congregation. Despite the changing times, it is the responsibility of the congregation to articulate the implications of our founding charism. As such, we will partner with the institutions to determine the ways in which we will evaluate the faithfulness to our tradition.

What will sponsorship look like in the future? Clearly this is an evolutionary process that is based on the relationship of the congregation and the institution. The IHM congregation is committed to working with our sponsored institutions to shape the direction for the future.

Institutions within Catholic health care have explored various models over the years. The Catholic Health Association (CHA) suggests that different organizational structures may emerge for our sponsored educational institutions. Perhaps some of the following models from CHA can be adapted for our educational institutions as we explore with the respective boards possible future models.⁹

- Inclusion of a Sponsors Council: In this model, a sponsors council exercises canonical responsibilities delegated by the corporate member, i.e., the leadership team. They share the exercise of canonical responsibilities of the corporation.
- Unicameral sponsor model: In this model, the congregation is the public juridic person. The congregation and the board of trustees act together in a governing role. The congregation has certain reserved powers but does not meet separately. As a single governing body, there is shared responsibility for the oversight of the institution. The revision of the Articles of Incorporation of Marygrove (1994) brought the governance of Marygrove to a form of this model.
- Organization becomes a public juridic person: In this model, the congregation receives permission from the Holy See to erect a new public

juridic person, accountable to the Holy See. The sponsors may be totally comprised of religious or a mixture of lay and religious. The congregation maintains the right to name members of the board.

Sponsorship will continue to evolve to reflect our changing times. As this evolution continues, the four roles of the sponsors need to be maintained.¹¹

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- ♦ Mission Integration: Through mission integration the Catholic identity and mission of the Church will continue. The development and articulation of the mission of the congregation must be clear and communicated on a regular basis to the sponsored institutions.
- ♦ Mutual Accountability: The sponsors, board and administration/management are mutually accountable. The responsibilities of each should be clearly articulated with regular communication between those

responsible for the administration and governance of the institution.

- ◆ Setting Competencies: With the increased number of lay leaders and lay trustees, the relationship of sponsorship needs to be articulated by the sponsoring congregation. Competencies or guidelines (i.e. IHM Belief Statements) need to be developed and used for ongoing reflection and evaluation.
- ◆ Formation/Development: Religious congregations are called to prepare those who will follow in a sponsored ministry. Collaboration with others, such as Catholic colleges and universities, can assist in preparing future leaders of our institutions. Ongoing board formation is critical to maintaining the link with religious congregations.

Fitzpatrick and Gaylor in an article in *Review* for *Religious* suggest: "Religious congregations intent on witnessing a prophetic stance in today's society should begin by calling forth the *prophetic potential* of their own institutions. One of the clearest and most articulate manifestations of who we are and what we value as religious is demonstrated in the institutions we sponsor (1990)." The challenge for IHM going forward is to be faithful to the mission and work with our sponsored institutions in developing and manifesting this prophetic potential.

Notes

- ¹ Juliana Casey, IHM. *Sponsorship and the Role of Trustees*. (1996) [Video] Monroe: Sisters, Servants of the Immaculate Heart of Mary.
- ² Mary Jane Herb, IHM, "An Investigation of the Role of a Religious Congregation, as Founder, in the Shaping of School Culture of a Secondary School" (PhD diss., Boston College, 1997).
- ³ E. H. Schein, Organizational Culture and Leadership (San Francisco: Jossey-Bass, 1992).
- ⁴ Mary Katherine Grant and Patricia Vanderberg, CSC, *After We're Gone: Creating Sustainable Sponsorship* (Mishawaka, Ind: Ministry Development Resources, 1998), 15–26.
- ⁵ Sharon Euart, RSM, JCD, *Canonical Relationship: Religious Institutes to the Church*, (Monroe, Mich: April 2015).
- ⁶ Sisters, Servants of the Immaculate Heart of Mary, *Minutes of the Chapter of Affairs*. Paper presented at the Chapter of Affairs (Monroe, Mich, 1988).
- ⁷ The General Chapter belongs to the entire Congregation under the guidance of the Holy Spirit. It is the point of integration of the many structures and processes by which all participate in the governance at the local and congregational levels. (*Constitutions*, Sisters, Servants of the Immaculate Heart of Mary).
- ⁸ Association of Jesuit Colleges and Universities, *Mission and Identity: A Handbook for Trustees of Catholic Colleges and Universities* (Washington, D.C.: Association of Governing Boards of Universities and Colleges, 2003), 54.
- ⁹ Catholic Health Association, *One Vine, Different Branches: Sponsorship and Governance in Catholic Ministries* (Washington, D.C.: Catholic Health Association of the United States, 2007), 16–19.
- ¹⁰ Public juridic persons are aggregates of persons or of things which are constituted by competent ecclesiastical authority so that, within the purposes set out for them, they fulfill in the name of the Church, according to the norm of the prescripts of the law, the proper function entrusted to them in view of the public good. (Canon 116, Code of Canon Law)
- ¹¹ Catholic Health Association, One Vine, Different Branches, 27–34.
- ¹² A. Fitzpatrick, and C. Gaylor, (1990), "Catholic Institutions: In Search of Prophetic Leadership," *Review for Religious*, 49(5): 740-746.

Mary Jane Herb, 174M

Mary Jane Herb, IHM, currently serves as president of the IHM congregation. Jane received her doctorate from Boston College in educational administration, writing her dissertation on the topic of sponsorship. For 15 years, she served as superintendent of Catholic schools in Albany, N.Y. She is a lifelong educator, having taught high school mathematics and served as assistant principal and principal in high schools within the Detroit area. During her tenure in Albany, she served as on the Marygrove Board of Trustees, president of the Chief Administrators of Catholic Education and on the National Catholic Educational Board of Directors. She is an adjunct professor in the Mary Ann Remick Leadership Program at the University of Notre Dame.



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