

# **The Transformative Faith-based Education Mission and One School's Journey to Become a Franciscan Institution**

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This paper focuses on two areas of educational mission. First, the authors examine the importance of mission statements and moving toward mission effectiveness by assessing organizations through the resource theory of the firm. In conjunction with this analysis the authors examine the mission statements of approximately 70 granting master degree institutions located in the northeastern United States (arguably the highest density of catholic universities). Finally, the authors present St. Bonaventure University's School of Business as a case study of efforts to live its Franciscan heritage in terms of mission effectiveness. A critical element of this heritage is the development of immersion service experiences because of the Franciscan traditions of service and community.

## **Moving from Educational Mission Statements to Mission Effectiveness**

For many years, management theorists have argued that crafting effective mission statements is essential to a well-running organization since it provides a basis for formulating effective objectives and strategies. In 1991 the AACSB reformed its accreditation program to allow non-research based schools entry to the association by encouraging them to develop programs and standards that addressed their uniquely crafted mission statements. As a result developing workable mission statements is now an essential task for many colleges and universities.

### *Effective Mission Statements and the Resource Based View of the Firm*

Crafting effective mission statements is fraught with difficulty, starting with what to include in such a statement, most notably in defining what the organization does. Abell (1980) suggests that three elements must be addressed:

- Customer groups (who)
- Customer needs (what)
- Technologies to meet customer needs (how)

An organization's failure to think through on how to articulate their business definition results in the classic trap of the generic mission statement which provides little support in articulating effective objectives that, in turn, are the basis of effective strategies. For instance, many business schools rely upon the boilerplate of "teaching, research, and service," articulating it in such a way that the definition could apply to any business school.

Research has revealed a mixed picture of the importance of mission statements in terms of organizational success. It is true that there are many successful organizations that have no mission statement or badly drafted ones. Some management theorists have argued that a more

effective tool for assessing mission effectiveness is by examining the resources of an organization. Jay Barney (1991) popularized the resource based view of the firm which states that a firm can achieve competitive advantage by identifying and deploying organizational resources as long as such resources are valuable, rare, imperfectly imitable, and non-substitutable.

Taken as a group, Catholic colleges and universities historically had some significant resources that allowed them to compete successfully with other universities. First, due to priests, sisters and other religious working and teaching in Catholic colleges, there was a steady source of inexpensive labor with superior credentials and skill sets. Second, the extensive Catholic secondary school system provided a feeder function to these universities. Finally, there was a strong proclivity in Catholic families for their children to attend Catholic institutions. Many of these factors that gave Catholic colleges and universities significant cost and differentiation benefits have been greatly reduced in the past twenty years.

The authors argue that effective mission statements are those that are drafted with a thorough understanding of the resources available to the organization. Sustainable competitive advantages for a school of business must be assessed in light of Barney's framework.

#### *Examination of Mission Statements*

We examined the mission statements (available online) for 27 Catholic and 41 non-Catholic masters granting Business Schools for key phrases in their mission statements. An examination of these mission statements can provide evidence of what resources the school of business sees as being particularly important.

Catholic university's mission statements suggest that these universities believe an important element of their distinctive competences to be:

- Identifying with their specific Roman Catholic traditions. 89% of the catholic universities provided this identification; normally early in the mission statement.
- Identifying the importance of Social Responsibility\Service and Ethical Values. 85% and 63% of the catholic universities explicitly mentioned Service and Ethical Values respectively. In contrast only 49% and 32% of the non Catholic Universities mentioned these items.

Clearly, Catholic universities profess to recognize their traditions and values as a key component of their educational experience. However, many Catholic universities likely under-utilize the network and resources of their traditional orders to the fullest extent.

The culture of most universities suggests they should provide Teaching, Research, and Service (the elements of faculty evaluation). From a mission perspective this is a worker focus and not a customer focus. Both Catholic and non Catholic universities mention Leadership, Scholarly Research, and Educational Excellence at rates of 30-45%. These are the most common elements of a non Catholic university's mission statement.

## **St. Bonaventure: A Case of Articulating its Franciscan Heritage**

In 2001 as part of its ultimately successful drive toward Association to Advance College Business Schools International (AACSB) accreditation the St. Bonaventure University (SBU) School of Business adopted a vision and mission statement that wedded the school to its Catholic (Franciscan) heritage by using the word “Franciscan” not once but five times. Not only did the mission statement address teaching and research in a Franciscan light, but service was enshrined and uniquely defined as follows:

Providing service to others, the very core of the Franciscan tradition, is our third priority. True to our heritage, we encourage our faculty, staff, and students to manifest our values through lives of citizenship and service.

At the time of adoption of this mission statement, the school had no programs or any formal mechanisms that meshed our Franciscan heritage with the School of Business. The revised mission statement acted as a catalyst for change as faculty, staff and students engaged in a series of programs that focused on formation, integration and implementation. Much of the effort has been directed toward identifying Franciscan resources, both from an intellectual capital perspective and from real-world resources of the international Franciscan movement. The result is that we have a series of successes that demonstrate how our academic and Franciscan missions are not separable but intertwined. Even more importantly we have identified even greater tradition-based educational opportunities.

A critical element of these educational opportunities is a structure that allows the intellectual learning in the classroom to be linked to activities outside on the classroom and a specific course. The key initiatives of these programs are listed and discussed below.

- The Pacioli Project. Named after the Franciscan friar who popularized double entry bookkeeping, the Pacioli Project familiarized faculty and staff with the Franciscan intellectual tradition. Under the auspices of university’s internationally recognized School of Franciscan Studies, nearly 30 faculty and staff members entered into a three year examination of Franciscan history and theology, focusing particularly on the role that the economy and poverty had on early Franciscan thought.
- Pacioli Scholars. While most universities have honors programs these program are often centered in the Arts and Sciences. Consequently, the course work for these programs may have limited appeal to business students. As an alternative, we developed the Pacioli Scholars Program. Following the example of Luca Pacioli, this program required students to be combination of scholars, active and campus and particularly active in service. In the Franciscan tradition, each student is allowed to “find their own way” and is encouraged to become involved across campus in activities that drive their interests. Over the past three years this program has evolved into a Learning Community. In the first four semesters student share at least one common class. In Junior and Senior years

students are asked to serve in a Mentor to Mentor activity. Students mentored by a faculty or staff member, mentor underclass students. Students also participate in group service activities; our flagship activity is time at the St. Francis Inn in Philadelphia.

- Co-curricular service activities. In 2002 there were no organized service learning activities within the school of business. Last year over 300 students were involved in nearly 18,000 hours of value-added service learning projects which we call “emersion learning.” Emersion learning experiences are a critical part of exposing students to Franciscan tradition. Because the duration of these service events are greater than a week, students are able to experience themselves and their groups as a community serving a larger community. Three key service learning organizations have emerged:
  - BonaResponds was formed in 2005 in the wake of hurricane Katrina. That year School of Business faculty led approximately 300 students, staff, alumni, and community members in the second largest collegiate Katrina related service trip in the country. Since then BonaResponds has expanded and its members have engaged in thousands of hours a year in service both locally and nationally. BonaResponds sponsors local community service days in both the fall and spring semesters. BonaResponds volunteers have provided storm damage clean up in Bradford Pa. and Buffalo NY. These single days are open to students as well as members of the local community. BonaResponds also offers 8-10 day emersion experiences during winter and Spring breaks; and shorter 4-5 day fall break trips. Locations have included Enterprise, AL, Bucyrus OH, Gassville AK, and the Mississippi Gulf Coast. BonaResponds offers students a number of opportunities to involve themselves in service for a specified duration of time; as little as a single day, as intense as an 8-10 day emersion trip, or an entire year of planning, organizing and leading.
  - The SBU chapter of Students in Free Enterprise (SIFE) with 80 members is the largest student service organization on campus. Focusing on long-term international relief, SBU SIFE, working with the government of the Bahamas, has started an economic development zone. Each year over 50 SBU SIFE members travel to the community of Pinders Point, Bahamas in which they engage in educating local children (1,800 last year), conduct after-school programs, teach adult learners computer skills, and conduct general service. Locally SBU SIFE works with 22 local schools teaching programs in entrepreneurship, leadership and economics. In addition student members teach and assist the homeless in resume preparation, and conduct computer literacy classes for the general population. SIFE offers students the opportunity to be involved in local and international communities for an entire year by undertaking (and owning) service projects that build one on one relationships with those served.
  - The SBU Volunteer Income Tax Assistance (VITA) has generated in its four years over \$1,000,000 in returns for low income working adults through out the entire county. This program, with outside financial support, was also able to offer an alternative Spring Break opportunity for a limited number of students. In 2008 SBU VITA partnered with the United Way and the Cattaraugus County Department of

Social Services to procure a retail site donated by the Olean Mall. Students volunteered to put together a marketing plan for VITA that included radio and print advertisements with funding procured by partners. The site was open approximately 50 hours a week for 10 weeks. Aggressive marketing resulted in an increase in total refunds procured from \$250,000 to \$600,000 and an increase in households served from 250 to 450 households. In addition, the SBU VITA program served as the community clearing house for assisting people in procuring the economic stimulus payments to an estimated \$200,000. VITA offers students the opportunity to use specialized technical skills (generally accounting based, but alternatively organizational based) in benefiting their local community members. VITA offers these students a “client type” relationship with those they serve.