From the CEO

At the publication of this annual report, I have had the privilege of serving as the new CEO of Leadership Roundtable for eight months. Why did I embark on this service? When I think about what gives me joy and consolation in life, two things come to mind: belonging and serving others, "the least among us". And then I think of the Church and what it is. For most of us, parish life is central and a parish is a community where we belong, give and receive, and are sustained to go forth and serve God and one another.

Healthy, vibrant parishes are no different from other institutions or organizations in that they need care. They need leaders who are equipped and supported, and many hands and feet to make them function. They need money, which requires careful stewardship. If any places in our society deserve to be guided by best management and leadership practices, it is our churches, so that their life-essential mission can be magnified.

As I’ve traveled across the US and to Rome to meet with supporters, members of the dioceses we serve, and the Church leaders whom we humbly aim to support, I’ve listened intently to what Leadership Roundtable means to people. What have we given them, and what do they seek from us?

I HAVE HEARD:

• We can trust Leadership Roundtable to be a responsive, powerful partner – one that maintains and leverages a network of networks to strengthen the Church.

• We are delighted that Leadership Roundtable is equipping lay people to offer their expertise within the Church.

• We are confident that Leadership Roundtable knows the Church and can guide dioceses, orders and organizations to integrate best management and leadership practices in service of the Church’s mission.

We are currently working on our next 3-year strategic plan. As we build upon a decade of service, we are responding to the call:

1. to deepen our impact by focusing our programs and services on "deep and lasting change" in dioceses and orders. Our engagements are becoming more comprehensive in nature, so that best practices will be deeply rooted in a Catholic organization’s culture after we are gone;

2. to widen our impact by extending our reach across the United States, supporting best Church management practices in Rome, and responding to international requests to learn from Leadership Roundtable’s model and programs;

3. to further commit to measuring and sharing the "game-changing" impact of implementing management and leadership best practices – an impact that is felt at the diocesan and parish levels, by Church leaders and parishioners, and in the communities they serve.

In this report, we describe some of the steps we have taken over the past year in view of these goals. We thank you warmly for your prayers and your support. May we all use our gifts to help the Church live out the fullness of its calling!

Kim Smolik Ed.D., CEO

LEADERSHIP ROUNDTABLE promotes best practices and accountability in the management, finances, communications, and human resources development of the Catholic Church in the U.S., including greater incorporation of the expertise of the laity.

We believe now, as we did from our start, that great managerial practices are a lampstand from which the Light of Christ can shine. Thanks to each of you for helping us help those who lead our Church.

Jim Dubik Ph.D., Board Chair
Retired Lieutenant General, U.S. Army

Growth has also involved updating how we communicate our identity, developing new marketing strategies, and hiring additional staff to meet demand. All of these steps have required us to expand our financial footing, a challenge that our new CEO Dr. Kim Smolik is attacking aggressively. An important part of this expansion is in earned revenue, which we have increased by over 225% compared to 2015. Additionally, growth means carefully nurturing the transition of our board membership to a new generation. Lastly, the board approved exploration in view of global outreach. Church leaders from several nations have invited us to help set up Leadership Roundtable-like organizations in their countries, and we’ve asked Kerry Robinson to explore global opportunities for growth.

Kim Smolik is leading us toward the future in all these dimensions. We believe now, as we did from our start, that great managerial practices are a lampstand from which the Light of Christ can shine. Thanks to each of you for helping us help those who lead our Church.

2016 was another great year for Leadership Roundtable. I have been gratified to see our organization grow by deepening and widening its engagements – exactly what the board called for several years ago during a thorough strategic and organizational review. At the time, the board anticipated the current increased demand for our services and identified ways for us to adapt from the organization launched in 2006 to what Leadership Roundtable is called to be today.

Deepening our engagements has meant helping dioceses, parishes, and other Catholic organizations map out long-term strategies to implement lasting, deep-rooted best managerial practices. Over 20 dioceses are now on this path. Widening our engagements has meant responding to more requests for our help, in conjunction with a number of partners. We have now touched over three-quarters of the dioceses in the United States, and a good number of other Catholic organizations, including seminaries.

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This was 2014. With these words, diocesan administrator Msgr. William Stumpf explained some of the reasons why the Archdiocese of Indianapolis chose to partner with Leadership Roundtable. We worked closely with the archdiocesan leadership team to assess needs and create a three-year roadmap, entitled *Empowering Pastoral Leaders for Excellence in Parish Leadership and Management*.

With the plan fully underway by 2016, last year was a transformative one!

**What did the Archdiocese want to achieve?**

*Its goals included having, within three years' time:*

1. financially literate pastoral servant-leaders with solid managerial, fundraising, and stewardship skills;
2. a diocesan office equipped to build the capacity of parishes to fulfill the Church’s mission;
3. collaborative ordained-lay leadership, with lay leaders whose managerial competencies complement those of the ordained.

33 lay pastoral leaders and deacons completed a mini-Toolbox program. A Toolbox for a third cohort is scheduled for 2017, with archdiocesan staff participating in delivery of the program - again, evidence that best practices are taking hold at a deep level in Indianapolis!

**How did the Archdiocese launch such a powerful, multifaceted, far-reaching program?**

It didn’t happen overnight. We’ll tell the story in stages.

- 109 priests who are moderators of culture and practice in the Archdiocese attended a Convocation of Priests. Leadership Roundtable’s clergy leadership adviser, Fr. Paul Holmes, gave the keynote addresses.
- Archbishop Tobin and 41 of his key ordained and lay leaders participated in the Catholic Leadership 360 program. 60 more participants are scheduled to attend in 2017 and 2018. Leadership Roundtable trained 18 leaders in the Archdiocese to participate in delivering the program - so they now have the capacity for ongoing leadership development.
- 19 priests completed the Toolbox for Pastoral Management program and gained essential skills.
- Three-fourths of all of our pastors and parish life coordinators have said that they lack financial and leadership training. We also have over 300 lay ecclesial ministers serving in our parishes. As a result, most of our pastors and parish life coordinators are finding out that they are now supervisors. Many of them feel very unprepared for this change of role.”
Six stages towards lasting change in the ARCHDIOCESE OF INDIANAPOLIS (2014-2016)

How did an honest assessment of challenges facing the Archdiocese of Indianapolis lead to a dynamic, ongoing process of integrating best practices deeply into every aspect of diocesan and parish life?

Our Model for Fully Implementing Best Management Practices helps tell the story.

STAGE 1: Raising Awareness of the Need for Change
In 2014, Archbishop (now Cardinal) Joseph Tobin began a conversation with his diocesan leadership team, including Chancellor Annette “Mickey” Lenza and Vicar for Clergy Fr. Steve Giannini, on how to respond to challenges impacting mission effectiveness. These included a lack of fiscal literacy and managerial skill among pastors, a diocesan office organized for an archdiocese of ten years ago, slow revenue growth in parishes, and a lack of stewardship capabilities. We met with Archbishop Tobin to discuss the importance of best practices, and to present options for leadership formation.

STAGE 2: Making a Start
Senior priest Fr. Jeffrey Godecker led a task force to identify needs, priorities and resources. The group conducted interviews with diocesan personnel, and reviewed the effectiveness of various uncoordinated improvement initiatives that were underway at the time. We led an analysis of the gathered data, advised on additional resources, and helped identify elements of diocesan life that could be integrated into a comprehensive plan.

STAGE 3: Establishing a Plan
In 2015, Archdiocesan leadership laid out a detailed three-year plan: Empowering Pastoral Leaders for Excellence in Parish Leadership and Management. Its goals included modeling servant-leadership, managing others in mission-focused activity, and understanding the impact of finances on mission. The archdiocesan budget prioritized leadership formation with a generous grant from Lilly Endowment, Inc., combined with internal investment. We facilitated the planning process, and brought content expertise and experience drawn from effective initiatives in other dioceses.

STAGE 4: Implementing the Plan
Newly-appointed project director Dr. Matt Hayes, with a steering committee and senior diocesan leadership, began formal implementation of the plan in 2016. Activities included a conviction of clergy, training using the Catholic Leadership 360 and Toolbox for Pastoral Management programs, establishment of a best practices framework using the Catholic Standards for Excellence, executive coaching of pastoral leaders, and creation of a Ministerial Excellence Fund. Each initiative was rigorously evaluated for outcomes, and will continue to be measured against the three-year plan metrics to assess its impact on mission effectiveness.

STAGE 5: Embedding Systems of Best Practice
In late 2016, Archbishop Tobin was made a Cardinal and transferred to the Archdiocese of Newark. Indianapolis leadership did not skip a beat; archdiocesan administrator Msgr. Stumpf led the continuation of the plan, showing that best practice systems combined with a clear comprehensive plan are not person-dependent and can be sustained even during times of unexpected change. All key leaders were by this point committed to ongoing development without waiting to be told to implement best practices.

STAGE 6: The Mission Thrives
At present, the Archdiocese has completed one full year of a three-year journey. Its outstanding progress is measured by metrics tracking activity in each of the six stages described in this model. When a new Archbishop is appointed, he will inherit a clear plan, energized leaders, a wealth of formation resources, and data to assess the impact of plan initiatives. It will be time to develop another roadmap in response to new challenges and opportunities.
### The Archdiocese of Indianapolis: IMPACT BY THE NUMBERS

<table>
<thead>
<tr>
<th>Program</th>
<th>Average Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>DIOCESAN STAFF DEVELOPMENT</td>
<td>4.85/5</td>
<td>Average score given by archdiocesan staff to staff development initiatives led by Leadership Roundtable.</td>
</tr>
<tr>
<td>TOOLBOX FOR PASTORAL MANAGEMENT</td>
<td>4.88/5</td>
<td>Average score given by program participants to assess the program’s practical value to their ministry.</td>
</tr>
<tr>
<td>CATHOLIC LEADERSHIP 360 ASSESSMENT AND DEVELOPMENT PROGRAM</td>
<td>4.5/5</td>
<td>Average score given by participants, when asked about the program’s impact on their understanding of their own strengths and weaknesses in such leadership capacities as: influencing others, infusing the parish with a sense of purpose, creating effective teams, and motivating others to perform at their best.</td>
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**Leadership Roundtable:** How would you describe your overall experience of the Catholic Leadership 360 program?

**Cardinal Tobin:** It has been one of great satisfaction. The program allowed me to do some structured thinking about my own ministry, and to receive feedback from people who have some experience of me as a leader. I went out of my way not to simply choose people who might have the default opinion that the Archbishop is the best thing since sliced bread. And I think that as a result of that, I got some very interesting comments.

**Leadership Roundtable:** What was the most positive part of the program for you?

**Cardinal Tobin:** It was certainly very affirming. People seem to think more of my leadership qualities than I myself do. But I got feedback that was nuanced enough to not be just a blanket, “You’re doing a great job” – instead, I heard, “You really excel in these areas of leadership, and you’re challenged in these areas.”

**Leadership Roundtable:** How do you think that feedback will help you as a leader going forward?

**Cardinal Tobin:** What’s going to make a difference is the performance plan I’m developing so that I can address some of the areas where I agree there is room for growth. As I do that, I’ll make use of the other resources that are available, including coaching and discussions with skilled facilitators. This will help me continue to hone what I like to think of as the art of leadership. I hope I never grow too old to want to learn how to do my art, and I would really encourage any priest to discover within himself the enthusiasm he has for pastoral leadership. With the tools Catholic Leadership 360 gives us, we can all do it better together.

“[The resources offered through Leadership Roundtable] will help me continue to hone what I like to think of as the art of leadership. I hope I never grow too old to want to learn how to do my art.”

- CARDINAL JOSEPH TOBIN
Catholic Leadership 360

“I learned things about myself, how people perceive me, how they perceive my leadership, that I really didn’t know, and I was very surprised in positive ways and also in challenging ways by some of the results.” – Fr. Phillip Bogacki, Pastor, Archdiocese of Milwaukee

Toolbox for Pastoral Management

Leadership Roundtable partners with dioceses and houses of formation to offer a week-long (or abbreviated three-day) intensive formational experience for seminarians, clergy and lay ecclesial ministers on the topic of management of parishes and other pastoral organizations. The curriculum, based on research into the experiences of veteran pastoral leaders, is taught by practitioners who know not only their content area (finance, HR, management, planning, etc.), but also the dynamics of the Catholic Church.

In 2016, eight Toolboxes were offered (four 6-day residential training sessions, and four mini-Toolboxes), more than in any previous year. Half of them were integrated into comprehensive diocesan ongoing formation plans, allowing for even greater impact going forward. The 180 participants came from four dioceses, three seminaries (in Boston, Baltimore, and Menlo Park, CA), and from the Catholic Theological Union of Chicago.

Cardinal Joseph Tobin of the Archdiocese of Newark, NJ, Archbishop Jerome Listecki of the Archdiocese of Milwaukee, and 195 other ordained and lay leaders from 10 dioceses completed Catholic Leadership 360. They now have pragmatic strategies to develop their leadership competencies, and the means to carry out those plans.

In 2016, Cardinal Joseph Tobin of the Archdiocese of Newark, NJ, Archbishop Jerome Listecki of the Archdiocese of Milwaukee, and 195 other ordained and lay leaders from 10 dioceses completed Catholic Leadership 360. They now have pragmatic strategies to develop their leadership competencies, and the means to carry out those plans.

In 2016, Leadership Roundtable completed six diocesan office/chancery assessments.

Diocesan Office/Chancery Assessment

This custom assessment offers unique opportunities for growth in leadership, using respectful, structured feedback from those with whom priests and lay leaders interact regularly. Participants identify a wide range of “raters” in their communities - hence the term “360” – to assess them in areas such as communication, planning, and personnel management. Each participant receives a report of the assessment results, engages in a confidential feedback session with a facilitator, and creates an individual development plan.

In 2016, Leadership Roundtable partnered with Santa Clara University’s 21st Century Leadership Initiative to train university staff and diocesan leaders from the Dioceses of San Jose, Stockton, and M onterey, and from the Archdioceses of San Francisco and Milwaukee to deliver the Catholic Standards for Excellence. Another 2016 highlight: the Standards themselves were updated to keep them relevant to current pastoral contexts, and a new edition was published in early 2017.

Catholic Standards for Excellence

Leadership Roundtable trains facilitators in Catholic dioceses and organizations on the principles and processes necessary for full implementation of the Standards for Excellence, a set of 69 best Church management practices. In a two-day seminar, facilitators gain an array of tools, training materials, resources, and techniques to convey the Standards to others in their diverse communities. Organizations run according to the Standards can work towards a Seal of Excellence accreditation.

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In these days when there are plenty of doubts about the credibility of institutions, the process [of working towards the Seal of Excellence] forced us to really look at what we were doing well, and adjust what we could do better. Since a parish is the place where the local community celebrates the Good News of Jesus, it’s so important to do so with integrity, effectiveness and excellence.”


“It's been good to have a new dimension in our seminary curriculum, one that we might listen to good and competent lay persons who love the Church and learn something about the principles of governance and Church management.”

– Msgr. James Moroney, Rector, St. John’s Seminary, Boston

“Leadership Roundtable was an enormous help to me as a new bishop learning how to be a CEO, as well as a pastor. I could not have assumed and executed my role as chief shepherd of the Diocese of Oakland without their expert assistance. Intelligent, insightful, discrete, and highly skilled in management analysis, they helped me rebuild and reshape my chancery staff and diocesan organization.”

– Bishop Michael Barber SJ, Diocese of Oakland, CA

In 2016, Leadership Roundtable completed six diocesan office/chancery assessments.

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Leadership Roundtable enlists the intellectual capital and entrepreneurial spirit of lay leaders, philanthropic partners, and Church leaders to incubate dynamic solutions for managerial challenges. In 2016, our partnerships reached across the United States and all the way to the Vatican. We have met to discuss our work with Church leaders from around the world.

The Francis Effect and Changing Church Culture: Advancing Best Managerial and Leadership Practices

At Leadership Roundtable’s Annual Convening in Philadelphia, on June 29-30, 2016, Catholic leaders strategized how to aid the Church’s mission through more skillful management. Speaking live to Convening participants from the Vatican, Danny Casey, director of the Office of the Secretariat for the Economy, strongly advised Catholic organizations to follow the same standards in business practices that are expected of institutions and governments worldwide. He also reported on his and Cardinal Pell’s work towards financial reform in the Vatican, as directed by Pope Francis.

Casey invited lay Catholics to assist the Church with prayers, practical support and guidance, as Leadership Roundtable has done: “We are always looking for people to serve on advisory boards or help us with particular projects, or people we can just bounce ideas off... imagine the potential we could unlock to do good in the world!”

Another highlight of the Convening was a panel of senior diocesan and parish leaders, who described how their local churches are implementing managerial best practices.

Full proceedings are available for download or purchase at leadershiproundtable.org/store.

Leadership Consulting

Leahedship Roundtable provides consulting services in the areas of management and leadership to individual Church leaders or leadership teams. Consultation can be subject-specific, related to a specific leadership role, or arranged on an ongoing basis as part of a broader organizational development initiative. Characterized by a faithful appreciation of the Catholic Church, a focus on implementation, and deep professional expertise, it includes ongoing development of managerial competencies, and often involves coaching senior leaders through specific situations.

In 2016, five U.S. bishops arranged ongoing coaching relationships through Leadership Roundtable. We also provided consultation to scores of dioceses and other Catholic organizations.

“I said to Larry Bossidy [retired CEO of Honeywell International, Inc., and Leadership Roundtable executive coach] ‘I’m a young bishop, I need some guidance, and I’d like you to work with me and the Diocese of Allentown... He agreed and really committed through weekly conference calls and periodic visits to the Diocese. He mentored our diocesan staff and influenced significantly my own management style.”

–Bishop John Barres

Roadmapping

Leadership Roundtable designed a comprehensive planning process called “Roadmapping” in response to Church leaders’ reports that they and their congregations were “tired of seeing our plans go nowhere.” The process involves identifying an objective, dividing it into manageable segments, organizing priorities, establishing action steps in a coherent sequence, and assigning accountability measures and timelines for moving forward. One bishop described roadmapping as “the missing piece that overcame two years of frustration” within his diocese.

The roadmapping process is an integral part of many other Leadership Roundtable programs.

BEST PRACTICES AWARD AND BOISI CATHOLIC PHILANTHROPY AWARD

Leadership Roundtable honored two outstanding Catholic leaders in 2016, who designed, invested in and helped deliver the Toolbox for Pastoral Management. Mr. Thomas J. Healey received the Boisi Catholic Philanthropy Award, and Rev. Paul A. Holmes received the Leadership Roundtable Best Practices Award.

MID-ATLANTIC CONGRESS - BISHOPS’ WORKSHOP

Our annual two-day Bishops’ Workshop, which is part of the Archdiocese of Baltimore’s Mid-Atlantic Congress, has become the preeminent occasion for bishops and their senior staff to confer on specific managerial and leadership needs. In 2016, we had the largest group of bishops and senior diocesan leaders to date: 40 individuals, including two archbishops and 14 bishops.

Bishops selected discussion topics in advance. At the Workshop’s conclusion, the Archdiocese of Baltimore, the Diocese of Manchester, the Diocese of Greensburg, and others requested follow-up visits from Leadership Roundtable staff, for assistance with needs such as strategic planning, leadership development, and Chancery reorganization.

At the Congress itself, over 1,350 participants from more than 60 dioceses attended more than 70 workshops - a record-breaking year.
The Honorable Michael Montelongo joined Leadership Roundtable’s board in 2016. He is president and CEO of GRC Advisory Services, LLC, and brought extensive experience in guiding executive transitions to the task of mentoring Kim Smolik in her role as Leadership Roundtable’s new CEO.

A governance and audit committee financial expert, public policy expert, and NACD Board Leadership Fellow, Michael credits his career accomplishments to his education on Manhattan’s Lower East side with the Capuchins, Dominicans, and later the Jesuits. “These individuals helped calibrate my moral compass,” he said, “and instilled in me the importance and nobility of a strong work ethic, doing the right things right, and selfless service.”

Dominic Perri

Dominic Perri had a standout year. Under his management, Catholic Leadership 360 expanded to the Archdioceses of Indianapolis, Baltimore, and Milwaukee, and is about to be implemented by several other dioceses. 2016 also saw two archbishops participate in the program.

“Archbishop Listecki [of Milwaukee] and Cardinal Tobin [of Newark, formerly Archbishop of Indianapolis] both spoke of how important it is for a bishop to get the kind of feedback Catholic Leadership 360 provides,” Dominic said. During the program, participants often identify aspects of their leadership in which they have room to grow, but, as Dominic continued, “One of the most common descriptions of Catholic Leadership 360 is that it is affirming. The tool provides the opportunity for those who partner with Catholic leaders to tell them how deeply they appreciate their ministry and presence.”

Dominic holds a B.S. in Physics from The Catholic University of America, as well as an M.A. in Sociology and an M.A. in Economics from the University of Maryland, College Park. A certified Covey 7 Habits Trainer, he is also trained in DiSC® Profile assessment, Neuro-linguistic Programming, and numerous other leadership programs.

Leadership Roundtable Global Initiatives

With the appointment of Kim Smolik as CEO, Leadership Roundtable’s board made the decision to appoint former executive director Kerry Robinson as Global Ambassador. She now responds to invitations from Church and executive lay leaders across the globe who are eager to access our unique form of service in their own countries. Exploratory conversations have taken place with Church leaders in Canada, Ireland, the United Kingdom, Australia, and the Vatican.

Program of Church Management, Santa Croce Pontifical University, Rome - Rome’s Santa Croce Pontifical University is developing a one-year Program of Church Management for clergy and lay students. Cardinal George Pell, Prefect of the Vatican’s Secretariat for the Economy, recognized Leadership Roundtable as uniquely qualified to help design and provide content for the program (the Toolbox for Pastoral Management and Catholic Standards for Excellence). Leadership Roundtable will also train program faculty in Rome.

Kylemore Summit at Kylemore Abbey, Ireland - Leadership Roundtable was a featured presenter in July 2016 for an audience of Irish Catholic leaders. Our history, framework, guiding principles, charisms, and suite of services have inspired a similar model for the Church in Ireland.

BBI - The Australian Institute of Theological Education, Australia - Senior Leadership Roundtable board members and staff have been in conversation with leaders of the Church in Australia and will make a presentation at a major national conference in 2017.

Vatican training course for new bishops - Each year, the Vatican holds a “bootcamp” in Rome for newly-appointed bishops from around the world. In September 2016, over 150 new bishops were introduced to the work of Leadership Roundtable and the importance of best practices in Church management and leadership development.
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- Ms. Besty Bliss
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- Mr. Brendan Casin
- Mr. Daniel Denihan
- Lt. Gen. James Dubik, USA (Ret.)
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- Jim Link
  Director of Development
- Jim Lundholm-Eades
  Director of Programs and Services
- Perry Robinson
  Global Ambassador
- Kim Smolik, Ed.D.
  CEO

PROJECT TEAM
- Kathy Costella
  Bookkeeper
- Katie Diller
  Project Coordinator, ESTEEM
- Fr. Paul Holmes
  Advisor, Clergy Leadership Formation
- Dominican Peri
  Project Coordinator, Catholic Leadership 360

Donors

- Richard Abdou
- Archdiocese of Hartford
- Archdiocese of Indianapolis
- Rev. Richard Bay
- Lois Benedetto
- Robert Beuter
- Bertelsen Family Fund
- Robert Beuter
- The Bok's Family Foundation
- Alexander Baucher
- Michael and Stephanie Brough
- Elizabeth Brown
- Juanita Cain
- Rev. J. Bryan Hehir
- Mr. Thomas Healey
- Rev. Thomas Smolich, S.J.
- Ms. Darla Romfo
- Mr. Paul Reilly
- Honorable Michael Montelongo
- Ms. Elizabeth McCaul

- James Link
- Susan King
- Mary Kessler
- Victoria Kennedy
- Sandra Kearney
- Brian Hughes
- Sandra Kearney
- Dr. Kimberley Smolik
- Rev. J. Bryan Hehir
- Mr. Thomas Healey
- Ms. Elizabeth McCaul
- Rev. Thomas Smolich, S.J.

Financials

<table>
<thead>
<tr>
<th>Assets</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$813,115</td>
<td>$828,717</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>$53,777</td>
<td>$27,750</td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>$0</td>
<td>$7,621</td>
</tr>
<tr>
<td>Inventory</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Total Current Assets</td>
<td>$866,892</td>
<td>$874,088</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>$5,636</td>
<td>$4,871</td>
</tr>
<tr>
<td>Total Assets</td>
<td>$872,528</td>
<td>$878,959</td>
</tr>
</tbody>
</table>

Liabilities

- Accounts payable and accrued expenses | $76,056 | $144,351 |
- Deferred revenue | $0 | $0 |
- Total Liabilities | $76,056 | $144,351 |

Net Assets

<table>
<thead>
<tr>
<th>Net Assets</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>$261,031</td>
<td>$31,608</td>
</tr>
<tr>
<td>Temporarily Restricted</td>
<td>$535,441</td>
<td>$703,000</td>
</tr>
<tr>
<td>Total Net Assets</td>
<td>$796,472</td>
<td>$746,608</td>
</tr>
<tr>
<td>Total Liabilities and Net Assets</td>
<td>$872,528</td>
<td>$878,959</td>
</tr>
</tbody>
</table>

Annual Report Financials

For Year Ending December 31, 2016

- Contributions
- Programmatic

2016 Sources of Support

- Program Funding: 18.1%
- Management: 17.5%
- Fundraising: 61.4%
- Total: 100%

2016 Uses of Support

- Leadership Roundtable: 15.7%
- Programmes: 18.1%
- Management: 17.5%
- Total: 100%

Catholic Leadership 360 Project Coordinator, Catholic Leadership 360

- Contributed
- Programmatic
- Management

- Leadership Roundtable: 18.1%
- Programmes: 17.5%
- Management: 64.4%
- Total: 100%
Fr. Monan was the consummate priest, counselor and leader. To know him was to be ennobled and called to be the very best version of one’s self.

- KERRY ROBINSON, GLOBAL AMBASSADOR

IN MEMORIAM

J. Donald Monan, SJ, a deeply loved and respected founding board member of Leadership Roundtable, died on Saturday, March 18, 2017.

Fr. Monan was the 24th President and First Chancellor of Boston College. In June 2014, he was honored with the Leadership Roundtable Best Practice Award for his “lifelong commitment to public service, higher education, and the Catholic Church, and his vision as a founding board member of Leadership Roundtable.”

As Leadership Roundtable’s founder Geoff Boisi observed: “Our organization would not be what it is without his contribution, advocacy and unwavering belief in its mission.”

Fr. Monan brought passion and distinction to everything he did. He said, “I would like to ask that we all not only pursue and achieve excellence by others’ standards…. I ask that we create new standards of excellence, and that we be the first to achieve those standards. I believe we can do it.”

At Leadership Roundtable, we aim to honor Fr. Monan’s life by continuing to create and live up to new standards of excellence in support of the Church’s mission.

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Leadership Roundtable promotes best practices and accountability in the management, finances, communications, and human resources development of the Catholic Church in the U.S., including greater incorporation of the expertise of the laity.