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# An Architecture for Recovery and Reform:

A plan to create a new culture of leadership and a new response to abuse in the Catholic Church



**LEADERSHIP  
ROUNDTABLE**  
*Service. Excellence. Church Management.*



# Introduction

The Vatican has called for regional task forces that will help countries implement guidelines to address the twin crises of abuse and leadership failures. To do so, one proposal for the United States would be to create two interrelated task forces: the first will aid recovery and the second, reform:

1. Recovery: to focus on the crisis of abuse and promote a new culture of how Church leaders respond to abuse;
2. Reform: to focus on the crisis of leadership failures and promote a new culture of leadership.



# Leadership Roundtable

- Leadership Roundtable has partnered with bishops, leaders of religious communities, Catholic colleges and hospitals, and senior lay executive leaders for 15 years to:
  - identify and promulgate best servant leadership and management practices grounded in Church teaching and canon law;
  - focus on human resource management, formation and development, finance, and communications.
- Members of Leadership Roundtable were part of the team that wrote the initial USCCB Charter for the Protection of Children and Young People.
- Leadership Roundtable has worked with more than half of the dioceses in the U.S. plus a number of religious orders, and other Catholic organizations and institutions.
- Leadership Roundtable is working with over 60 dioceses who are at various stages of the Mission Management Model to guide their long-term culture change processes.



# The New Reality: Twin, Interrelated Crises

- The 2002 sexual abuse crisis is now recognized as twin crises: the sexual abuse crisis and the crisis of leadership failures and cover-up.
- The two are interrelated, as the sexual abuse crisis resulted from a culture of clericalism and a set of leadership and management practices that allowed for, then covered up, the abuse for decades.
- These crises have:
  - eroded the moral authority of the Church in the public square,
  - affected the ability of the Church to evangelize,
  - destroyed the credibility of Church leadership in the eyes of many;
  - placed the Church's financial well-being at risk.
- These crises offer an opportunity to transform the body of Christ: to create a new culture of servant leadership and management practices and a new partnership between the lay and ordained members of the Church.



# Leadership Roundtable's Response to the Twin Crises

## Leadership Roundtable:

- published a series of essays and a white paper on the twin crises and the associated requirement for recovery and reform. It also published:
  - 1) not only an intellectual framework useful in understanding the twin crisis and the associated solutions of recovery and reform,
  - 2) but also an organizational construct that would be useful in translating plans into sustained action,
- hosted a gathering of bishops, other ordained and religious leaders, and lay executives in October 2018 to discuss the twin crises and propose actional recommendations,
- responded to over 50 dioceses and other Catholic organizations seeking services and support relating to the twin crises;
- convened the Catholic Partnership Summit with more than 200 Catholic leaders to address the twin crises. The recommendations from the Summit were published in a report, *Heal the Body of Christ*, that was sent to every bishop and other key stakeholders.



## Recent Work in Response to the Twin Crises

- Leadership Roundtable members, board members, and staff have:
  - participated in numerous conferences and panels as keynote speakers or subject matter experts;
  - responded to media requests.
- A sampling of such activities include the following:
  - Panel on the Sexual Abuse and Leadership Crisis, Georgetown University
  - Symposium on the Sexual Abuse Crisis, Canisius College
  - Keynote - Oblate School of Theology in San Antonio
  - Interview with America Media for article on what to expect from Vatican meeting on abuse
  - Facebook Live event on the crisis: Faith in Public Life



# Catholic Partnership Summit, February 1-2, 2019

## Leadership Roundtable co-hosts:

- Cardinals Cupich, O'Malley, and Tobin
- Archbishops Pierre (Papal Nuncio), Kurtz, and Listecky
- Bishops Cantú and McGrath

## Benefactors:

- Boisi Family Foundation
- Ms. Kathleen S. Craft
- The Cushman Foundation
- John and Cyndy Fish, Suffolk Cares Charitable Foundation
- Peter and Carolyn (posthumously) Lynch

## Leaders from the following organizations:

- Catholic Community Foundation of Los Angeles
- University of Notre Dame
- St. Mary's Seminary and University
- National Catholic Education Association
- Albertus Magnus College
- Catholic Leadership Institute
- Secretariat of Cultural Diversity, USCCB
- Boston College
- Conference of Major Superiors of Men
- Leadership Conference of Women Religious
- Catholic Extension
- SSM Healthcare of Wisconsin
- Trinity Health
- The Lynch Foundation
- Center for Church Management, Villanova University
- The Catholic University of America
- Center for Applied Research in the Apostolate
- National Federation for Catholic Youth Ministry
- Catholic Mobilizing Network
- Canisius College
- National Association of Church Personnel Administrators
- Georgetown University
- Napa Legal Institute
- Ascension Health
- Catholic Health Association
- FADICA
- Sacred Heart Seminary
- Fairfield University
- RENEW International
- Raskob Foundation
- Center for Child Protection, Rome and others



## Results from the Catholic Partnership Summit

- Specific recommendations centered around best practices in accountability, co-responsibility, and transparency for USCCB leadership, bishops, and lay leaders.
- Two common observations:
  - the twin crises are not local crises; they cross dioceses so their solutions demand a comprehensive and coherent, national approach—even if execution is left to individual bishops, religious leaders, and leaders of other Catholic organizations.
  - the tasks associated with recovery and reform will require sustained leadership attention.



# The Twin, Interrelated Solutions: Recovery and Reform

- The twin crises must be resolved together.
- The Catholic Church in the United States must:
  - recover from the sexual abuse crisis, and
  - reform the leadership culture by addressing the root causes of the culture that permitted the abuse, then covered it up for generations.
- Lowering expectations, denying the realities of both crises, diminishing the importance of both recovery and reform, or any other form of “half measures” risks further damaging the body of Christ in the U.S.
- In some parts of the Catholic community in the U.S., morale is already extremely low and impatience for comprehensive action is extremely high.



# Recovery Task Force

**Purpose:** to replace a culture of abuse and cover-up with a culture of safety and transparency and allow the light of Christ to shine

**Expertise:** investigatory, legal, judicial, and victim services

## **Recovery Tasks:**

- Render full account of the credibly accused
- Extend the Charter on the Protection of Children and Young People to cover episcopal behavior
- Provide justice and meaningful support to the survivors and fairness to healthy clergy
- Prevent future abuse
- Replace the spirit of clericalism with servant leadership and advance unity

*Implementing each set of tasks requires an organization composed of lay, religious, and ordained leaders, men and women.*



## Reform Task Force

**Purpose:** to replace a culture of clericalism with one of servant leadership and management practices that reinvigorate the body of Christ

**Expertise:** institutional, systemic, and organizational

### Reform Tasks:

- Create a standards-based, transparent, and accountable servant leadership culture across the Catholic Church in the United States, in the governance, human resources, financial, and communications areas
- Replace the spirit of clericalism with servant leadership and management practices, and advance unity

*Implementing each set of tasks requires an organization composed of lay, religious, and ordained leaders, men and women.*



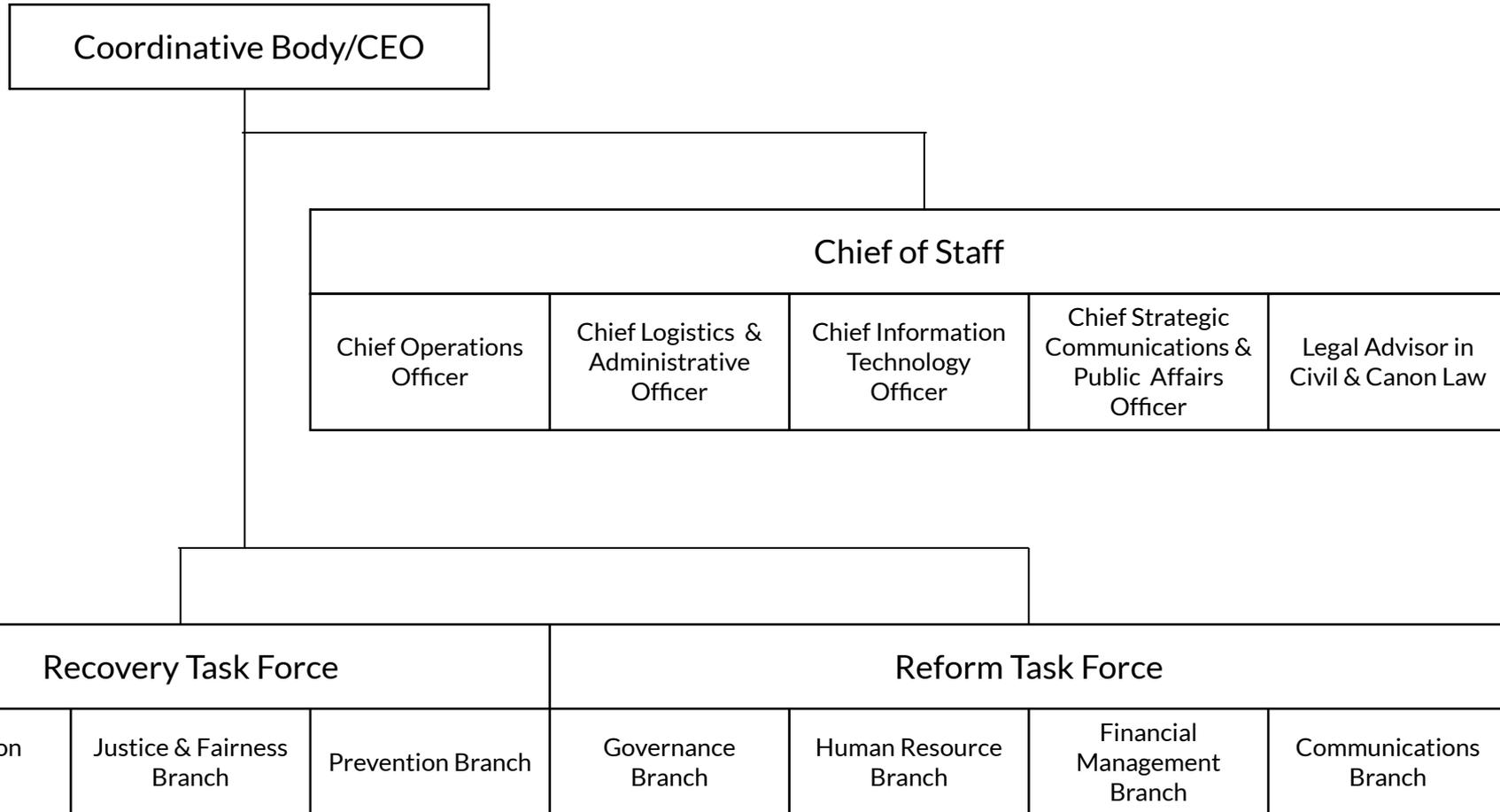
# Interrelated Task Forces

Task Forces need a common, coordinative body.

Coordinative Body						
Recovery Task Force			Reform Task Force			
Investigation Branch	Justice & Fairness Branch	Prevention Branch	Governance Branch	Human Resource Branch	Financial Management Branch	Communications Branch



# Common Coordinative Body



**Collaborative, national policy development, centralized coordination, decentralized execution.**



# Common Coordinative Body

## Scope:

- Convenes Catholics from all walks of life to lend their talents.
- Identifies goals and metrics and provide unity of effort.
- Creates discernment, decision-making, action, and reporting cycles
- Ensures all recommendations reflect “best practices,” aid in replacing the spirit of clericalism with servant leadership, and advance unity in the Body of Christ
- Provides common information technology infrastructure
- Provides common communication strategies
- Reports to a governing board consisting of: the President, USCCB; selected leaders of religious organizations; the Apostolic Nuncio; and a senior U.S. Cardinal

## Management:

- Tasked by the USCCB through a formal, written charter with the independent authority to conduct investigations and make recommendations, and
- Mandated timelines

## Expertise:

- Acknowledged and experienced, value-based senior executive leadership
- People of faith

Recovery Task Force			Reform Task Force			
Investigation Branch	Justice & Fairness Branch	Prevention Branch	Governance Branch	Human Resource Branch	Financial Management Branch	Communications Branch



# Major Strategic Tasks & Timetable: Coordinative Body

## Immediate Tasks (month 1)

- Make a public announcement that the U.S. Bishops are committed to:
  - a national approach that addresses both crises, sexual abuse and leadership failures and cover-up
  - the formation of a coordinative body that will head two task forces, one for each crisis, include the general tasks and purposes of each
- Announce the date the task forces will begin
- Form the staff and the funding for the coordinative body

## Near term (months 2-4)

- Convene body of experts who will make up the coordinative body and two task forces
- Publish charters, directives, and major objectives for each task force and sub-branches
- Set timetables for formation, cycles for in-process reviews, and media plan for public updates
- Begin task force work

## Mid term (months 5-15)

- Monitor progress of task forces
- Recommend policy changes to governing board
- Announce completion of tasks as necessary

- Unity of effort
- Coherency of action
- National approach
- Decentralized execution

## Long term (months 16-36)

- Complete task force work
- Ensure all policy changes are codified
- Transfer task force activity to permanent structures in order to:
  - provide continued management of policy execution
  - continually improve and adapt initial decisions



# Sample Tasks (from Summit): Recovery Task Force

	<b>Investigation Branch</b>	<b>Justice &amp; Fairness Branch</b>	<b>Prevention Branch</b>
Towards a New Culture	Publicly acknowledge the sexual abuse failure, accept responsibility, engage with survivors, and begin to restore trust	Form proactive agreements to cooperate with external, civil authorities on investigations, reports, and statutes of limitations	Define clericalism, its root causes, and the various forms it takes
Transparency	Set national standards and protocols for: role and responsibility of diocesan review boards, standard definitions for the accused and other major terms, retention and record keeping, release of names of all credibly accused, what a comprehensive audit process entails, and periodic, independent review of files for allegations or red flags	Involve abuse victims at each decision-making level	Involve women in initial and ongoing clergy formation
Accountability	Convene a national working group of clergy and lay experts to help write a Code of Conduct for bishops and ensure the Charter for the Protection of Children and Young People includes bishops	Ensure seminary curriculum addresses abuse prevention, improved human formation, personal integrity, and the experience of survivors	Provide vocation directors with better training and develop national standards relating to clergy selection and abuse prevention
Co-responsibility	Establish a national or metropolitan independent, lay-led entity that will address misconduct of bishops and bishop accountability and will include transparency during and after an investigation	Consider a regional review board model that would allow multiple dioceses that lack certain experts to come together to ensure a wide cross-section of expertise and consistency of practice	Create a governance structure that is transparent with layered checks, balances, and oversight, and includes the expertise of the laity at the parish, diocesan, and national level



# Sample Tasks (from Summit): Reform Task Force

	<b>Governance Branch</b>	<b>Human Resources Branch</b>	<b>Financial Management Branch</b>	<b>Communications Branch</b>
Towards a New Culture	Put in place mechanisms for greater synodality among bishops, among bishops and priests, among clergy and laity	Require best practices in human resources: effective selection, training, assignment, evaluation, compensation, and continuing education	Identify the twin crises as the main priority for Church funding and resourcing for the immediate future	Provide consistent, transparent, and coordinated communications at all levels
Transparency	Commit to and invest in creating a new culture of leadership and management that is transparent, accountable, and proactive in including lay leadership and co-responsibility	Develop and invest in ongoing formation programs in management and leadership to train clergy, religious, and laity, including bishops	Provide full financial transparency regarding all aspects of the crisis, include how donations are used	Establish a crisis communications plan and develop a proactive plan for restoring trust
Accountability	Seek authority for the bishops conference to modify canon law to address local realities and update canon law to include a detailed list of punishments for clearly defined crimes of abuse or cover-up by clergy, religious, or laity	Explore different models of training for new bishops	Build a broad, deep, and transparent financial management and accounting system	Identify best practices for bishops to listen to and engage parishioners that makes bishops accessible and responsive to needs
Co-responsibility	Commit to a diocesan governance structure that is transparent with layered checks, balances, and oversight, including a strong presbyteral council, corporate board, and diocesan pastoral and finance councils	Implement ongoing professional and personal formation and 360-degree assessments for bishops and all Catholic leaders that begins in seminaries and ministerial programs; assessments should be linked to appointments	Implement ongoing best practices training for all Catholic leaders, covering, financial management, decision-making, pastoral management, etc.	Use data to show the visible, measurable change since the implementation of the Charter to help restore trust, especially with the young and disaffiliated



## Questions

- How have we, lay and ordained Catholics, individually and as a community been changed by the two, interrelated crises?
- In the midst of the crises, there is an opportunity for recovery and reform. How do we respond to the Spirit in times like these?
- The Catholic Church in the U.S. has all the expertise it needs, does it have the will to do what is necessary?