We are the Body of Christ:
CREATING A CULTURE OF CO-RESPONSIBLE LEADERSHIP

A report from the 2020 Catholic Partnership Summit
## OUR MISSION

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.

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In the midst of any crisis in the Catholic Church, it is good to be reminded that God has given us the gifts we need to respond. These gifts are found among the various members of the Body of Christ, as we are reminded in scripture, “But as it is, there are many parts, yet one body” (1 Corinthians 12:20). And when we unite those gifts as one Body of Christ, valuing each member and working co-responsibly to do our part, we can accomplish great things together.

This spirit of unity was palpable during Leadership Roundtable’s Catholic Partnership Summit in February 2020 with the theme, “From Crisis to Co-Responsibility: Creating a New Culture of Leadership.” The Summit sought to model the synodality and co-responsibility to which Pope Francis has called us where members engage in mutual listening and sharing for the greater good of the People of God. Over a period of two days, more than 260 Catholic leaders from 64 dioceses across the United States and Rome came together in prayer and dialogue, to learn from one another and to recommend best practices to help our Church move towards a new culture of co-responsible leadership.

This report shares those discussions and recommendations and we invite you to join the dialogue begun at the Catholic Partnership Summit by reading and reflecting upon these recommendations, sharing them broadly, and implementing them in your local faith community.

Archbishop Christophe Pierre, Apostolic Nuncio to the United States, shared at the Catholic Partnership Summit, “It is not the Church’s task to provide ‘pre-packaged’ solutions, but rather to animate each person’s vocation so that in the freedom of the sons and daughters of God, the person may accept his or her proper responsibility for advancing the Kingdom.”

Your particular gifts and responsibilities are urgently needed to help our Church in these times. We know that it is not possible to solve a crisis alone, but when every member of the Church works co-responsibly, we can do great things together because we are, indeed, the living Body of Christ.

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As a result of conversations and convenings over 15 years, Leadership Roundtable has developed these guiding principles to help shape recommendations to create a new culture of leadership.

**Guiding Principles**

1. Impact the Catholic Church based on three principles: accountability, transparency, and co-responsibility.
2. Impact the leadership and management culture of the Church, in line with Catholic beliefs, ecclesiology, and canon law.
3. Restore trust in the Church based on measurable, visible outcomes.
4. Engage both ordained and lay Catholics, working together for the mission.
5. Lean forward into new possibilities.
6. Be realistic and able to be translated into practical strategy and implementation.
The following concepts capture the heart of the dialogue at the Catholic Partnership Summit.

There was a recognition that:

- There is a need to transform the culture of leadership in order to advance a thriving Church
- Pope Francis’ long-term goal is synodality: a listening, discerning Church
- A new culture of leadership should be rooted in a theological foundation
- Co-responsibility, transparency, and accountability are critical to address any crisis
- Church leaders should engage the diverse gifts and expertise of both the laity and ordained in management and leadership
- The Church needs to invest in and implement innovative models of management and leadership
- As the Church faces a financial crisis, it is necessary to create structures and laws for ethical financial leadership
- It is important to explore the roles of corruption and/or incompetence that have contributed to the financial crisis
- A new culture of leadership requires philanthropic commitment and faithful stewardship to address current disparities
- New models of initial and ongoing formation are necessary to form those who can be both servant leaders and competent managers
- Young adults need to have a seat at the leadership table and a voice in decision-making in the Church today
- Leadership of the Church needs to reflect the diversity of Catholics, with a particular focus on the Latino/Hispanic community
- Due to the multiple crises in the Church, trust needs to be restored
Leadership Roundtable convened its 2020 Catholic Partnership Summit on the topic “From Crisis to Co-Responsibility: Creating a New Culture of Leadership.” Former Pope Benedict XVI called for greater co-responsibility, saying that laity must no longer be viewed as “collaborators” but recognized as “co-responsible” for the Church. More recently, Pope Francis has called for greater lay involvement and synodality, saying, “A synodal church is a listening church.... It is a reciprocal listening in which each one has something to learn.” To this end, Leadership Roundtable sought to bring together clergy and lay leaders to address how co-responsibility can help the Church respond to its multiple crises.

Approximately 260 Catholic leaders gathered in Washington, DC from across the United States and the Vatican. This executive summary contains the major themes and high-level proposals that emerged from the panelists and table conversations. The full report contains articles on the four major topics that were discussed, along with the top recommendations from the participants for creating a new culture of leadership in the Church.

Envisioning a New Culture of Leadership

1. Transform the leadership culture to create a thriving Church
   The Church’s culture of leadership not only needs to change, but to be transformed in order to advance a thriving Church. This begins with transforming our relationships, with Christ and with one another. This new culture of leadership prioritizes co-responsibility, listening, discerning, and welcoming the diversity and talents of all the Body of Christ.

2. Restore trust through servant leadership
   Trust is the outcome of integrity. In order to restore trust, leaders must not only do the right thing, but also show their integrity through the way they lead. The Church needs servant leaders who are willing to walk with the rest of God’s people on pilgrimage; to serve with vulnerability and humility; to choose love over fear, inclusion over exclusion.

A Culture of Co-Responsible Governance and Leadership

3. Develop and implement new models of co-responsible governance
   Catholic leaders must create new models of co-responsible governance and shared decision-making. Healthy governance requires transparency and accountability which includes national standards, external audits, and public reports. Dioceses could look to Catholic healthcare, higher education, and charities for models of governance.

4. Enhance personnel management and assessment of all leaders
   Best practices in personnel management are required in order to promote a culture of co-responsible governance and leadership. This includes effective selection, clarity of roles, 360-degree feedback, transparent promotion processes, family-friendly policies, and just compensation. The Church needs a management culture in which candor is encouraged, conciliation bodies are in place, whistleblower policies are publicly known, and restorative justice models are practiced.

5. Implement a synodal approach
   Catholic leaders can build relationships, trust, and accountability through regularly scheduled listening processes at the national, diocesan, and parish level. All synods need a diversity of voices in delegate selection.

6. Invest in the formation of lay and ordained leaders
   More leadership formation and common standards are needed for Catholic leaders. Dioceses could seek expertise and resources from Catholic universities. Additionally, Catholic leaders will benefit from mentoring, coaching, and intercultural competency training. It is important for seminary formation to take place within a diverse student body and be taught by diverse faculty, with lay faculty involved in initial screening and subsequent evaluations.

A Culture of Ethical Financial Management and Stewardship

7. Advance ethical financial leadership and management
   As the Church faces a financial crisis, it is necessary for the Vatican and the U.S. Conference of Catholic Bishops to create structures and laws for ethical financial leadership, such as financial versions of the universal law Vos Estis Lux Mundi and the U.S. Dallas Charter & Essential Norms. Healthy financial management requires the establishment of common financial and accounting protocols, compliance standards, audits, reporting, and training that could be enacted through a lay association of chairpersons of diocesan financial councils.

8. Empower finance councils
   All diocesan and parish finance councils should have clarity about their roles and responsibilities, and be supported in implementing best practices as they select members, orient new members, and conduct business.

9. Promote ethical and faithful stewardship
   Financial resources belong to the people of God. Greater formation is needed in the biblical roots of stewardship and how it is lived today, especially related to best practices in ethical fundraising, parishioner engagement, disposition of gifts, and investment of funds.

A Culture with Young Adult Catholics at the Leadership Table

10. Create structures and support for emerging Catholic leaders
   Catholic leaders must create a seat at the leadership table and a voice in decision-making for young adults in the Church today. In order to support these emerging leaders, there is a significant need for investment in ministerial education and leadership development, as well as more just personnel policies and practices for those working in the Church.

11. Ensure gateway moments and attention to diversity
   Catholic leaders at the diocesan and parish level must provide pastoral care for young adults at different stages of life and moments of transition. These encounters should be welcoming in tone, sensitive to diverse cultures, and reach a broad range of young adults. Moreover, Catholic leaders need to deepen their understanding of the issues that young adults face and create a safe space for dialogue about these issues.

12. Develop ministry with, for, and by young adults
   The Church must invest in innovative approaches that engage young adults and involve them in the creation and implementation of ministries. It is important to accompany young adults in their faith journey; to help them encounter Christ in new ways and to experience community. Additionally, Church leaders should share best practices in leadership development to equip each successive generation of young adult leaders.
SCRIPTURAL MODELS OF CATHOLIC LEADERSHIP & MANAGEMENT

“I have given you a model to follow, so that as I have done for you, you should also do.”

JOHN 13:14–15

It is in and through the person of Jesus Christ that the Catholic Church understands its relationship to God and who we are called to be. The life of Jesus provides a model for each one of us to follow as daughters and sons of God. It is a model for those in leadership, as well as for anyone seeking to follow Christ.

At this time of crisis in our global Church when the Body of Christ has been wounded from the sins of abuse and leadership failure, it is timely to once again explore scripture’s models of leadership.

Leadership and Management Models from Scripture

Christian scripture offers a generous array of metaphors for leadership and management. Jesus himself uses multiple metaphors and models to refer to his leadership, for example, the metaphor of the good shepherd (“I am the good shepherd.”) A good shepherd lays down his life for the sheep.” John 10:11) or the metaphor of the protective hen (“...as a hen gathers her young under her wings.” Matthew 23:37).

Archbishop Charles Scicluna of the Congregation for the Doctrine of the Faith, a leader in the Church’s response to the abuse crisis, has offered five scriptural metaphors to explore qualities of leadership and management in our times: witness (martys), steward (diakonos), overseer (episkopos), shepherd (poimen), and servant (diakonos).

The first metaphor of a “witness” is appropriately linked to leadership as a leader is called to be a missionary disciple, a witness to Jesus Christ. Some qualities of witnesses in scripture from which we can continue to derive wisdom are those of being a credible truth-teller and having integrity. The Book of Revelation refers to “Jesus Christ, the faithful witness” (Revelation 1:5) and the Acts of the Apostles says, “But you will receive power when the Holy Spirit comes upon you, and you will be my witnesses in Jerusalem, throughout Judea and Samaria, and to the ends of the earth.” (Acts 1:8).

A second metaphor for Christian leadership and management that we find in scripture is that of a “steward.” The qualities of a steward include being held accountable for using gifts and resources properly and being transparent in one’s use of them. The First Letter to Peter reminds the disciples that everyone is to be a steward of the gifts they have received, saying, “As each one has received a gift, use it to serve one another as good stewards of God’s varied grace.” (1 Peter 4:10). Jesus himself says that there will be accountability of stewards, saying, “Much will be required of the person entrusted with much, and still more will be demanded of the person entrusted with more.” (Luke 12:48).

A third metaphor for Christian leadership and management is that of “overseer” which derives from the Greek word for supervisor and is used repeatedly in scripture. Some of the qualities of a good overseer are delineated in the First Letter to Timothy as being “impeccable, married only once, temperate, self-controlled, decent, hospitable, able to teach, not a drunkard, not aggressive, but gentle, not contentious, not a lover of money.” (1 Timothy 3:2-3). Additionally, the Acts of the Apostles speak to the fact that overseers must “keep watch over [themselves] and over the whole flock.” (Acts 20:28).

A fourth metaphor is that of a “shepherd” whose qualities remain relevant to Christian leaders today, including a love for the flock, an accountability to the community, and a kindly watchfulness over them. There are multiple references to this metaphor in scripture, ranging from Jesus who calls himself “the good shepherd” (John 10:11, 14) to the early Christian communities who pick up on this metaphor as seen in the First Letter of Peter where the author exhorts the elders to “shepherd the flock of God that is among you...not domineering over those in your charge, but being examples to the flock.” (1 Peter 5:2-3).

A fifth metaphor from scripture is the leader as a “servant.” The qualities of a servant leader include the notion of humble service and a willingness to pick up a mantle of co-responsibility. We see this when Jesus washes the feet of his disciples and says, “If I, therefore, the master and teacher, have washed your feet, you ought to wash one another’s feet. I have given you a model to follow, so that as I have done for you, you should also do.” (John 13:12-17).

It is important to note that trustworthiness is lifted up as central to leadership: “Thus should one regard us: as servants of Christ and stewards of the mysteries of God. Now it is of course required of stewards that they be found trustworthy.” (1 Corinthians 4:1-2). The multiple crises of recent decades in the Church have resulted in a broken trust. In order to lead our faith communities in a meaningful way, it is imperative for Catholic leaders not only to take the right actions, but also to be attentive to the way that they lead if trust is to be restored. Scripture’s leadership metaphors offer multiple approaches that can lead toward restored trust.

Servant Leadership: A Model for a Church in Crisis

Of scripture’s many metaphors for leadership and management, servant leadership stands out as particularly helpful for our Church today that faces numerous crises. In fact, it is the model to which Christ turned at his own moment of crisis as he faced his impending death. Servant leadership is certainly a way to help us rediscover the Paschal Mystery of our own times, through the cross and the tomb, toward Resurrection and a renewed Pentecost.

It is this model of servant leadership as part of a synodal and discerning Church to which Pope Francis calls us. In his address on the 50th anniversary of the institution of the synod of bishops, he shared:

“Syndicality, as a constitutive element of the Church, offers us the most appropriate interpretive framework for understanding the hierarchical ministry itself. If we understand, as Saint John Chrysostom says, that “Church and Synod are synonymous,” inasmuch as the Church is nothing other than the “journeying together” of God’s flock along the paths of history towards the encounter with Christ the Lord, then we understand too that, within the Church, no one can be “raised up” higher than others. On the contrary, in the Church, it is necessary that each person “lower” himself or herself, so as to serve our brothers and sisters along the way.

Pope Francis went on to emphasize his point about ministry as servant leadership, saying, “Consequently, those who exercise authority are called ‘ministers’, because, in the original meaning of the word, they are the least of all.”

Christ’s Invitation to Catholic Leaders Today

At Leadership Roundtable’s 2020 Catholic Partnership Summit, Archbishop Scicluna took up this same theme of servant leadership. He reminded participants that the model of servant leadership is not only reserved for bishops and priests, but is a model for a synodal and co-responsible Church, for all the People of God. Each one of us is invited to share in this model by virtue of our baptism. Archbishop Scicluna reflected, “It is baptism that makes us servants, prophets, and also makes us priests. This is what we call the common priesthood.” Archbishop Scicluna’s comments referred back to the Second Vatican Council’s document, Lumen Gentium, that states, “These faithful are by baptism made one body with Christ and are constituted among the People of God: they are in their own way made sharers in the priestly, prophetic, and kingly functions of Christ...” [31].

Of note, Archbishop Scicluna mentioned the “Munus Regendi” which is the term used to refer to the gift of pastoral governance to which we have been called. While this role is often referred to with the metaphor of “king”, Scicluna remarked that Pope Francis “would actually prefer ‘Minus Ministerialis’, the role of being a servant.” This interpretation aligns more closely to the gospel metaphor of servant leadership to which Jesus invited his disciples.

During the Last Supper, knowing that the disciples would soon shoulder the responsibility of his mission, Jesus gave them the model of servant leadership. He said, “I have given you a model to follow, so that as I have done for you, you should also do.” (John 13:14-15). The same invitation remains true for us today. May we have the courage to answer this call.
Isaiah the prophet annually plays a very important role in preparing us for the feast of Christmas and then in today’s scripture lesson, he reappears once again at the beginning of Lent reminding us of what genuine fasting truly involves. He does not disappoint. Isaiah, eight centuries before the coming of Christ, was a voice that challenged many prevailing authoritative opinions and common religious traditions. On more than one occasion, he spoke of our spiritual responsibilities on behalf of the poor, prisoners, and the oppressed. He was, one might suggest, a Pope Francis of his own time. And Isaiah challenged those whose narrow religious categories often neglected the people on the periphery of society. In today’s lesson, Isaiah dares to remind us that successful fasting will be pleasing to God only when it comes from a heart that is softened by mercy and through the practice of genuine justice.

We are close enough to the beginning of the season of Lent to still perhaps be considering what we should be doing during these 40 days of prayer, penance, and charity to ponder in response to the meaning of Isaiah’s admonition. Our penitential behavior and our prayer itself will be hollow if it does not lead us to a greater concern for and outreach to the poor. During the forthcoming final week of Lent, Isaiah will once again remind the Church that:

The Spirit of the Lord GOD is upon me, 
because the LORD has anointed me; 
He has sent me to bring glad tidings to the lowly, 
to heal the brokenhearted, 
To proclaim liberty to the captives and release to the prisoners, 
To announce a year of favor from the LORD and a day of vindication by our God, 
to comfort all who mourn; 
To place on those who mourn in Zion a diadem instead of ashes, 
To give them oil of gladness in place of mourning, a glorious mantle instead of a listless spirit.

Leadership within the Church, when properly understood, has always been identified with service and never merely to be equated with title or rank, as Jesus repeatedly on multiple occasions reminded His first disciples and all of us as well. We all need such reminders because we are prone to forget the irrevocable link between service with leadership. Indeed, that link will be a key focus of this conference dedicated to the evolving future of Church leadership.

Our young people who have been increasingly disinclined to follow the legacy of religious organizations from the past are still very much attracted to service. This affinity was clearly present when even a half-century ago, young Americans found meaning and interest in the Peace Corp, Jesuit Volunteers, and Vista among other post-college opportunities for public service. Our young people today are not selfish or disinterested, but often they are unenthusiastic with Church programs from the past – especially if they cannot see the linkage between religious practices and social needs.

Isaiah resonates with the dissatisfaction of many young people who see fasting without compassionate and active concern for the poor to be fraudulent if not irrelevant. Many young people are more concerned about the works of charity than our penitential practices or even our prayer during the season of Lent – as would be Isaiah himself.

These are the young people that the Church so desperately needs in leadership for our common future. They are not necessarily irreligious, agnostic, or even hostile toward faith and its practices and customs. They simply follow a pattern that Isaiah first recommended centuries before Christ and that Christ Himself confirmed and perfected when He established His Church. They think Isaiah was right!
The twin crises of abuse and leadership failure have prompted Catholics to imagine a healthy and thriving Church of the future that is not just changed, but transformed. A new culture of leadership is needed that values strong relationships, creative thinking, and unfettered dialogue among all members to advance solutions. By the same token, the crisis has challenged Catholics to not simply entertain that bold vision, but create a structural model of how it could become concrete reality.

Leadership Roundtable’s 2020 Catholic Partnership Summit represented a major step along those promising pathways towards a hopeful new era of Church leadership and management. Offering a framework for the imposing task ahead was Fr. J. Bryan Hehir, Secretary for Health and Social Services of the Archdiocese of Boston and Harvard professor. He told the Summit participants, “Remember the roots of the crisis…, refuse paralysis since we are bigger than the crisis… and recall what you see in this room, especially when times are tough and you seem alone. Look around this room at the potential of the Church in this country.”

Envisioning a New Culture of Leadership

The Hallmarks of a Reimagined Church

That charge was quickly taken up at the Summit. Moderator Kim Daniels, Associate Director of Georgetown University’s Initiative on Catholic Social Thought and Public Life, challenged the panelists to envision a flourishing Church. She cast a vision of a Church that embraces the notions of synodality, co-responsibility, and trust and “puts what Pope Francis calls the ‘beating heart of the Gospel’ at the center of what we do.” A panel of leaders and subject matter experts provided thoughtful and creative suggestions that envision this new culture of leadership.
Christina Lamas, Executive Director of the National Federation for Catholic Youth Ministry, invited the audience to imagine walking with her into a church where they are immediately welcomed and greeted by worshipers and ministers. “People are drawn to this parish because the leadership is cultivating a sense of community and belonging to something much bigger than themselves,” she said. “And no matter the age, all individuals feel heard and acknowledged as individuals. Everyone matters in this place because leadership cares.” She went on, “You see people working together, there is ownership, new ideas are flourishing, and they are all serving a common purpose.”

For Cardinal Joseph Tobin, Archbishop of Newark, leadership is entwined with the notion of pilgrimage, which teaches us that the mission of the Church is not simply trying to find better right because it sounded like it was a good idea. “Tobin mentioned that he spent 18 years of his life in leadership of his religious community “trotting around the world talking about restructuring, and it never felt right because it sounded like it was simply trying to find better administration.” But Pope Francis has helped us see that it is really about pastoral conversion, making it clear that “not simply that my heart needs to change, but also my strategies and my structures have to change. And change to what? To align with the mission that’s been entrusted to us.”

Transform the Church

The primacy of relationships in creating a new culture of leadership for the Catholic Church was powerfully articulated by Sr. Carol Zinn, Executive Director of the Leadership Conference of Women Religious. She shared UNESCO’s definition of culture as a group of people coming together to teach and learn something; who have ways of communicating; who possess ways of organizing; and who have a sense of purpose or mission. Sr. Carol then invited the Summit participants to reflect on these hallmarks of culture in the context of Catholic tradition. “Our Church, whom we love, is a culture. It meets those four criteria,” she said, and then asked whether our current culture is one that nurtures the relationships that help us live the gospel. In developing a new culture for the Church, Sister Carol stressed the need for a new “consciousness” and to recognize that a precious moment is at hand to not just change structures and management policies of the Church, make them more transparent and accountable, but to actually transform them. “I’m actually not interested in any conversation about changing our Church whom we love, because we will end up with the same form and function with a few tweaks,” she argued. “It’s not enough. I think we’re being offered through this crisis to [have] a consciousness of transformation, like a caterpillar to a butterfly…where everything of the caterpillar dies, no holding on, and bringing together all of that capacity in that cocoon to let something else be created.” Equating the analogy to the Church, Sister Carol continued, “You know you’re in a transformational moment or process when you have a new form and a new function….I’m talking about relationships that are built on mutuality, respect, and dialogue…..”

As a final challenge to participants, Christina Lamas amplified the discussion. “Leadership is about presence, accompaniment, a willingness to share, and being a servant.”

Leadership is about presence, accompaniment, a willingness to share, and being a servant.

–CHRISTINA LAMAS

 seamless with other people, and leaders who are not managers but…well, leaders, she said. “Leadership is about presence, accompaniment, a willingness to share, and being a servant,” Ms. Lamas affirmed. “We just need more leaders like that in all aspects of our Church and society.”

[Synodality is] a culture that recognizes the variety of gifts but always searches for and responds to the unifying Spirit.

–CARDINAL JOSEPH TOBIN, CSsR
After listening to the Session 1 panelists on the topic “Envisioning a New Culture of Leadership”, Summit participants responded to the question: “What does a thriving Church look like?”

A Church that Values Diversity and Inclusion
“[A Church composed of all cultures, all generations, at the table together and, if they are not there, let’s ask ‘Who is not around the table?’]
“One that recognizes that the Spirit gives gifts to both men and women and calls both men and women into leadership.”
“A Church that holds up young people as leaders, inviting them to share in the visioning process and to help the Church be better.”

A Church that Values Servant Leadership
“A thriving Church looks like Jesus washing the feet of the disciples. There is humility. There is a sense that the structure of the Church and her leadership is organized in a way that is radically different from other organizations. This is rooted in service.”
“It is a humble, listening Church that values every voice and brings them into harmony to form a symphony directed at proclaiming the Gospel of Jesus and moving people to fulfill his mission.”
“It is about servant leadership, a change of heart and mind, a courage to think and act differently, for example, a Church of the poor.”

A Church that Values Missionary Discipleship
“Pope Francis has said, the Church is not a country club of saints, we are a field hospital for sinners. We are all pilgrims together. Pope Francis invites us to go to the peripheries, to invite people in.”
“Have a spirit of welcome at every parish, asking people’s names, inviting people to Mass. This is a Church that looks out rather than in.”
“A Church that recognizes the lived experiences, the sense of the faithful. It is a Church that facilitates a dialogue with our rich tradition, and that dialogue leads to action.”
“A thriving Church is where prayer is the source from which ministry and ministry planning flow.”

A Church that Values Co-Responsible Governance
“The Church should represent the Body of Christ: we are different parts, but from the same body; we have different roles, different responsibilities, but we work together collectively for one common goal.”
“A Church that actively promotes lay involvement and respects lay expertise.”
“A thriving Church is like a round table with high levels of engagement and a sense of mutuality. It is people standing shoulder to shoulder, working towards a common good that comes from the heart the gospel message. Relationship is at the heart of mission.”
“We need to work collectively for the mission. When we focus on the mission, not trying to preserve what exists, then new things emerge.”

A Church that Values Trustbuilding
“A thriving, co-responsible Church encourages honesty.”
“Polarization in public life is very much a part of Church life. We need to be explicit in building bridges and trying to find common ground.”
“Focus on Jesus as a means to build trust.”
“Trust between lay people and clergy, working together with a true focus on and love of Church. Trust is the foundation of transformation and listening is important in this process.”
The daunting task of innovating a new culture for the Catholic Church could be greatly enriched by investing in new structures and models of governance and leadership that draw upon both lay and ordained expertise, as well as further developing those already in place. At the 2020 Catholic Partnership Summit, leaders from a wide range of managerial and ecclesial backgrounds spelled out how that focus on co-responsible leadership could provide a strong and sustainable template for moving the Church into a new age of transparency and accountability.

Geno Fernandez, Leadership Roundtable board member, served as moderator of this session on co-responsible governance and leadership. He helped frame the session by inviting the participants to reflect on questions such as “How are decisions made in the Church? Who makes them? And how do we keep the body healthy?”

Proclaiming that “good structures head off bad behavior at the pass,” Fr. Dennis Holtschneider, CM, President of the Association of Catholic Colleges and Universities, went on to describe for the conference how Catholic higher education and healthcare institutions voluntarily submit to co-responsibility that comes from investigators, auditors, accreditors, government oversight, and independent reporting groups. He cited how these accountability mechanisms make these institutions stronger. “If you have to defend what you’re doing in front of other people, you become more thoughtful and bring outside ideas into the organization. You become better at what you do... It has become part of our culture. That’s how higher education and healthcare works, and the Church uses it to a small extent, but it’s something that could be incorporated further....”

Similarly, Fr. Holtschneider described a potentially collaborative role for the anonymous reporting structures many Catholic bodies have put in place for the public to blow the whistle on alleged cases of abuse of children. “We could put these systems in place for financial reporting, as well,” he challenged the participants. “There’s no doubt in my mind that the next wave of Church scandals for us is in the financial arena, and the more
that we can do to fully address transparency and accountability in Church finances, the better.” Here, Fr. Holtschneider credited the work begun 15 years ago by Leadership Roundtable to promote best practices at all levels of the Catholic Church in critical temporal disciplines.

**Learning from What Works**

After initial meetings at the beginning of his appointment, Bishop Mark Bartchak of Altoona-Johnstown, Pennsylvania, decided not to retain the diocesan pastoral council that only met once a year and had little impact. Instead, he opted to form councils in the diocese’s five deaneries. He seeks to transform the culture of councils in how they operate by drawing into the conversation people from all levels of the Church. We’re talking about “the kind of discernment where you don’t start with an agenda, but let the Holy Spirit work,” he explained. “Many of my priests are stuck in maintenance mode... others are dying to do something going forward. We’re trying to do the latter, but I can’t get the information to direct the diocese unless we can have a conversation from the bottom up and hear really what’s on the minds and the hearts of our people.”

The membership of the deanery pastoral councils is two-thirds laypersons and one-third clergy. Bishop Bartchak noted, “I can’t predict how it’s going to go, except thanks be to God, I’m already hearing around the diocese... people want to be part of that experience and I can’t tell you how excited I am for the possibilities that await us.” Throughout the planning process, each dean has been assisted by an experienced layperson and these executive partners have agreed to stay on to offer advice and support. This has already had an impact on the deans and made their local leadership more effective. All the deanery councils will come together at least twice a year for a roundtable summit and this will form the basis for a diocesan pastoral council.

That collaborative, synodal spirit is also integral to the administrative culture at the Archdiocese of Chicago. Before making any important decisions, chief operating officer Betsy Bohlen consults with the vicar general and cardinal. “I think it always requires a partnership approach,” she said. “On many of our teams, I make sure two people are assigned: a person with administrative skills and one with pastoral skills. You definitely need both.”

But making co-responsibility the ballast by which the Archdiocese of Chicago routinely operates presents its own set of challenges, at Ms. Bohlen, a former partner at McKinsey & Company, pointed out to Church leaders. Those include balancing the needs of the individual with the broader needs of the Church, adapting the skill sets of new employees to a vastly different pastoral environment, and reconciling acceptance and inclusion with accountability and excellence. “Historically, I think we have underestimated the complexity and the challenge that comes with governing and managing dioceses,” Bohlen told her audience. “[If] you put people together and expect them to operate well together, that won’t happen on its own. Part of the job of a person with managerial experience is to get people to work together as a team.”

Bohlen’s hopeful message for those looking to reengineer Catholic Church culture is that the essential resources are often available and waiting to be tapped. They include newly retired individuals and people between jobs with unique skill sets who are anxious to serve their Church. “When they have understood that we were trying to do something transformational, and that their gifts are called for, the talent we’ve been able to attract in this difficult environment is beyond my wildest expectations.”

**Shared Decision Making**

Knowing how to effectively share power among those leaders is no less important to a high-performance culture. As Fr. Holtschneider put it, “Good fences make good neighbors, and so do very clear governance structures of who does what... This way, multiple groups have a role in a single decision and no one body can suddenly impose its will on the rest.”

One method that Fr. Holtschneider shares with organizations to help master the dynamics of power-sharing is the RAPID decision-making tool developed by Harvard Business School, where each letter represents a discrete responsibility (Recommend-Agree-Perform-Input-Decide) on the decision tree. “It is a method that serves large, complex organizations,” said Holtschneider, “but it also

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"There’s no doubt in my mind that the next wave of Church scandals for us is in the financial arena, and the more that we can do to fully address transparency and accountability in Church finances, the better."

– FR. DENNIS HOLTSCHNEIDER, CM
Co-Responsible Governance

GOVERNANCE STRUCTURES

- Publicly commit to and provide the resources for co-responsible governance and shared decision-making structures at the parish, diocesan, and national level
- Create independent boards that embrace best practices, including term limits, diverse members, accountability structures, auditing, etc.
- Create a governance reform working group, similar to the Australian Catholic Bishops Conference, to produce a plan for reforming governance structures
- Practice subsidiarity by delegating responsibility and decision-making authority to deaneries, leadership teams, and pastoral and finance councils
- Model co-responsible governance by convening priest and lay ecclesial convocations and utilize parish discernment processes to involve parishioner input in pastoral planning
- Expand the use of lay pastoral coordinators in parishes as permitted by canon law

AUDITS AND STANDARDS

- Develop an external audit system with public reporting for governance structures and practices in dioceses, religious orders, and other Catholic entities
- Establish external financial audits that represent robust and objective best standards for religious nonprofit entities
- Seek outside accreditation with the Catholic Standards for Excellence or a similar model of best practices for dioceses, religious orders, and other Catholic entities
- Publish ad limina reports to further advance transparency and accountability

SHARED DECISION MAKING

- Welcome the diversity of gifts and expertise of the laity as part of their baptismal call to governance (munus regendi); ensuring our structures reflect that governance is not only reserved for the ordained (see canon law 129 §2)
- Define clericalism, its root causes, and the various forms it takes in order to move towards co-responsibility and shared decision making
- Systematize a partnership model at the diocesan and parish levels, for example, pairing a management expert with a pastoral leader
- Create structures for the inclusion of women in leadership and decision making at every level of the Church

Baptism makes us all servants, prophets and priests, allowing laypeople to share in the teaching ministry and in governance of the diocese through their skills and expertise.
Advancing Synodality

SYNODAL APPROACHES
- Encourage senior leaders to build trust by setting up listening processes and opportunities to be held accountable in order to create a culture that promotes dialogue
- Make sure there is broad diversity (such as gender, race, age, etc.) on every advisory council and provide the formation and tools that members need to participate
- Create regular opportunities for bishops and other diocesan leaders to hear directly from priests and laity, without the filter of gatekeepers
- Create a conduit for young Catholics to dialogue with and share ideas with leaders

SYNODAL STRUCTURES AT THE NATIONAL, DIOCESAN AND PARISH LEVELS
- Reform the structures and approaches within the United States Conference of Catholic Bishops towards greater synodality between the secretariats and dioceses in order to work on shared pastoral initiatives
- Organize forums across the country to develop a shared understanding of co-responsibility and how to incorporate this model of leadership at every level
- Hold regular synods in the diocese and encourage all parishes to have listening sessions
- Choose delegates to ensure a broad voice from the diocese including: women, deacons, religious, lay members of the diocesan pastoral council and parish councils, theologians, representatives of diverse racial and ethnic communities, etc.

Formation of Lay and Ordained Leaders

LEADERSHIP FORMATION AND ONGOING EDUCATION
- Provide strong leadership training in the areas of human, spiritual, and intellectual formation, and management training that emphasizes that all the baptized are co-responsible for the mission
- Expand the support that Catholic universities offer towards leadership formation, focusing more on practical and contextual training
- Create formation programs and processes based on common standards
- Enhance training and mentoring programs for new bishops
- Develop and invest in mentorship and coaching programs for all lay and ordained leaders
- Develop intercultural competencies, including a specific understanding of Hispanic culture and ministry
- Involve women faculty in diocesan programs for ongoing clergy formation

SEMINARY FORMATION
- Ensure seminary curriculum and formation address improved human formation, solid academics, and leadership and management competencies
- Reform seminary formation to include a diverse student body, faculty, and staff, as well as collaboration between seminarians and lay women and men
- Involve lay faculty members in seminarians’ initial screening and subsequent evaluation for ordination
To regain the trust of the People of God and the wider public and to prevent future crises, the Catholic Church needs to actively embrace a system of sound and honest fiscal management and stewardship. As moderator Chris Lowney, Vice Chair of CommonSpirit Health, advised Church leaders at the start of this panel discussion: we need to arrive at “a culture where people’s first instinct when something goes wrong is not to cover it up, not to ignore it, not to deny it…[but to] love the institution enough to sit down and tackle the problem.”

The framework for such a fiscally and ethically strong enterprise was sketched out by Anne Cullen Miller, President of the Catholic Community Foundation of Minnesota. She related how her organization, the largest of its kind in the country awarding $17 million annually in grants to the Catholic community, has built a durable financial infrastructure grounded in best practices such as transparency, independent audits, checks and balances, and public disclosure of all funding. Integral to her group’s grantmaking activities is an independent lay board of directors on which the local archbishop sits — and has a close working relationship with other board members — but does not exercise a vote. As the abuse crisis played out in recent years and multiple dioceses in the state declared bankruptcy in its wake, the Catholic Community Foundation of Minnesota was still able to “earn the right to grow because of some of the trust that has been established with our constituents,” asserted Ms. Cullen Miller. In a field where public trust and accountability is everything, “we are an example of trying to work towards co-responsibility with sound financial stewardship.”

Underscoring the fiscal and structural integrity of the Catholic Community Foundation model was Jeri Eckhart Queenan, Partner with The Bridgespan Group. She pointed out to the Summit participants that more than 80 percent of dioceses around the country now have Catholic foundations (with the top four totaling $4 billion in assets), with lay experts serving on their boards. “It seems that setting up independent financial institutions that are led by highly competent and expert financial people attracts funds,” she stressed. “And that’s very healthy for the Church because these funds now go to support our dioceses, our schools, and our people.”

The Case for Full Financial Reporting

Providing further strategic direction for Church leaders was Patrick Markey, Executive Director of the Diocesan Fiscal Management Conference. He vigorously endorsed transparency and accountability by calling on all leaders to make their financial statements and lists of donors public and for parishioners to ask for the statements. Acknowledging that churches are exempt from filing financial information through IRS Form 990 — required of most...
Raskob Foundation for Catholic Activities, provided instructive insight. “Leverage the laity” was a mantra he floated for the audience, reading from a letter that family member and foundation co-founder John Raskob sent to U.S. bishops in 1929. In that missive, he stressed how vital it was to have laypeople interested and involved in the problems of the Church “in order that they can and may assume responsibilities in an intelligent fashion.” Mr. McGrory encouraged the laity to “knock on the doors until they open” and advocate for their co-responsible involvement for the good of the Church.

As the chairperson of a well-known and respected foundation created 75 years ago with the mission of aiding the Catholic Church, Mr. McGrory dwelt on the importance of wisdom in decision-making and co-responsibility. “We all have wisdom to share, but it’s not enough, we must do things through a well-defined process of reporting and investigative follow-up. “We need that for finances, we need that for management,” he declared. “We need some kind of accountability in place.”

Mr. Markey’s call to action was punctuated by his candid observations that “there is a financial crisis in the Church.” He elaborated, “We let money dictate what we do, and we haven’t trusted in God. I think that’s the basis of the crisis we’re in. We have to fund our projects... so therefore, too often we don’t trust in God. We trust in that donor.” In addition to the need for personal conversion, he proposed “more transparency and accountability in the way we do things” as strategies for tackling the problem. More specifically, he favors publicising comprehensive lists of all donors and amounts given and finding some avenue to enable bishops to become more accountable. “The problem with diocesan finance councils...is that they don’t have any authority in the real world to help bishops out,” he said. He suggested that there is too much discretion in how they are used and that empowering these councils, perhaps canonically, to fulfill that support role for bishops would represent a huge step forward.

The idea of a looming financial crisis in the Catholic Church in the United States – voiced by no less than two fiscal experts at the 2020 Catholic Partnership Summit – was noted by Fr. J. Bryan Hehir, Secretary for Health and Social Services at the Archdiocese of Boston and professor at Harvard University. Reflecting on its implications in light of the Church’s abuse crisis, Fr. Hehir asked, “If it’s true that there is a financial crisis, then the question becomes, do we rewrite history?” For him, the question of a financial crisis created a flashback. “Imagine if somebody said in 1999 or 2000 to a similar hall of well-informed Catholics, ‘The Church has a sexual abuse crisis’. If it had been said and believed, would the story have been very different than it is now?” Moreover, if the threat of a financial crisis has merit, Fr. Hehir pondered why. “Is the financial crisis because of the lack of competence at levels from the parish through the episcopacy, or is it corruption rather than competence, or is it something described as culture, but it’s not quite clear what the content of the culture is?” He went on to say, “I was hesitant to put it in these terms, but it didn’t seem there were many other terms I could use to be careful about the language, but to be serious about the possible implications.”

Leverage the Laity

In search of cultural building blocks that work, the proposals offered by Patrick McGrory, Chairman of the Raskob Foundation for Catholic Activities, provided instructive insight. “Leverage the laity” was a mantra he floated for the audience, reading from a letter that family member and foundation co-founder John Raskob sent to U.S. bishops in 1929. In that missive, he stressed how vital it was to have laypeople interested and involved in the problems of the Church “in order that they can and may assume responsibilities in an intelligent fashion.” Mr. McGrory encouraged the laity to “knock on the doors until they open” and advocate for their co-responsible involvement for the good of the Church.

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Leverage the Laity

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Structures for Ethical Financial Leadership

- Urge the Vatican to hold a synod of presidents of bishops’ conferences on the subject of ethical financial management practices and to promulgate a motu proprio that would serve as a Vos Estis Lux Mundi for financial management.
- Ensure that the response from the United States Conference of Catholic Bishops (USCCB) to the Vatican’s financial motu proprio includes structures for accountability, third-party reporting mechanisms, whistleblower protections, consequences for misconduct, and regular external audits.
- Develop national standards for financial management, established as particular law for the United States, together with an annual, publicly-shared audit process that would become a “Dallas Charter and Norms” for financial policies and practices.
- Establish an independent, national lay review board to monitor and ensure compliance with the newly formed charter and norms that would provide oversight of financial management.
- Create a lay association of chairpersons of diocesan finance councils to establish common financial and accounting protocols, compliance standards, training for council members, etc.
- Commission a study of all recent financial scandals, as well as diocesan bankruptcies, with a focus on lifting up best practices, discerning the financial and moral lessons that can be derived, and preventing future crises.

Training for Ethical Financial Leadership

- Provide mandatory financial literacy training in person or online (similar to the Virtus program) for all priests, parish staff, school staff, council members, volunteers, religious orders, and ecclesial movements.
- Ensure financial literacy training that includes the basics in financial management, as well as ethics of transparency and accountability.
- Implement a robust curriculum on financial management in seminaries.
- Provide bystander training to help people identify mismanagement and speak out when they see it occurring.

Policies and Procedures for Ethical Financial Management

BEST PRACTICES

- Align financial policies and procedures with best practices such as the Diocesan Fiscal Management Conference’s “A Guide to Best Practices”, the Association of Fundraising Professionals’ “Code of Ethical Standards”, and Leadership Roundtable’s “Catholic Standards for Excellence”.
- Utilize the USCCB, Diocesan Fiscal Management Conference, or new lay association of finance council chairpersons to standardize policies and share best practices between dioceses.
- Require Catholic organizations seeking funding from foundations or donors to adhere to best practices in financial management.
- Issue national standards on offertory collections and cash handling procedures.
- Encourage dioceses to share best financial practices among parishes and encourage interparish collaboration, for example, sharing a business manager for a cluster of parishes.
- Ensure dioceses and parishes have written financial policies that are consistent with the Church’s mission and adequate for their size, complexity, resources, and personnel.
- Create a conflict of interest policy and statement for all Church staff (both lay and ordained), as well as council members.

RECOMMENDATIONS FOR ETHICAL FINANCIAL MANAGEMENT AND STEWARDSHIP

When you are seated around the table and you understand the concept that everyone has a piece of the wisdom….goodness comes forth.”

- Patrick McGrory

Patrick McGrory
AUDITS
- Implement sound financial and operational systems to identify and prevent mismanagement, protect the integrity of data, and ensure accurate records are kept
- Identify auditing standards, aligned with GAAP and Catholic principles, and apply them to parishes, dioceses, seminaries, religious orders, national Catholic entities, and ecclesial movements
- Promote fiscal responsibility and transparency for dioceses and large Catholic institutions with a regular auditing plan, including management staff, an internal auditor, and an external independent auditor

REPORTING
- Develop a uniform template for financial reporting at every level of the Church (including parishes, dioceses, seminaries, religious orders, national Catholic entities, ecclesial movements, etc.)
- Standardize internal financial data systems within and between dioceses or Catholic entities, for example through requiring use of a common accounting platform for financial management and reporting
- Publish — in print and online — an accessible, annual report that contains the mission, vision, program activities, sacramental data, Mass attendance, and complete financial data, as well as the metrics by which success is defined
- Issue Form 990s or something similar, even when not required, in order to promote transparency
- Mandate that ordained and lay staff report significant personal gifts with strict oversight

Diocesan and Parish Finance Councils

CONVENING AND SELECTING MEMBERS
- Convene a finance council in every parish and diocese as required by canon law and meet at least four times a year
- Identify a transparent process for the finance council to select new members and ensure they reflect the diversity of the people in the faith community
- Select individuals for the finance council who possess the specific skills needed for the role
- Implement term limits and engage in coordinated succession planning and leadership development

ORIENTING MEMBERS AND CONDUCTING BUSINESS
- Provide finance council members with orientation and ongoing formation to carry out their responsibilities
- Establish management policies and procedures for the finance council, assure that adequate human and financial resources are available, and actively monitor the allocation of resources in line with the mission and pastoral plan
- Ensure your diocesan or parish pastoral plan takes into account trends and projections about Catholic affiliation and giving so as to proactively address financial sustainability
- Periodically review compensation structures to ensure the right to a just wage in conformity with Catholic Social Teaching and diocesan policies, with reference to resources such as the National Association of Church Personnel Administrators

Ethical Stewardship Approaches and Practices

APPROACHES
- Promote a culture of stewardship grounded in the understanding that financial resources belong to the People of God — not to a single leader, organization, or ministry — and are there to sustain the Church
- Form Catholic leaders in the biblical spirituality of stewardship as the foundation for ethical financial management
- Provide Catholic leaders with training in best practices for how to fundraise ethically, professionally, and as an extension of ministry
- Engage with parishioners in a manner that respects the way different cultures relate to money and giving in order to effectively advance stewardship

PRACTICES
- Appoint a stewardship council that represents the diversity of the faith community
- Explore whether your parish may be positioned to move to a total stewardship model
- Communicate on a regular schedule with parishioners about the financial situation in the diocese/parish and how donations are used
- Ensure policies are in place to govern the acceptance and disposition of charitable gifts in line with donor intent
- Thank parishioners as you would thank donors in a nonprofit setting with gratitude reports, thank you letters, annual reports, etc.
- Develop an endowment plan as part of sustainable stewardship
- Ensure investments of funds are made in line with the USCCB’s Socially Responsible Investment Guidelines
Any transformation of Church culture must ensure a prominent leadership role for young adult Catholics that would amplify their voices through leadership positions on councils and boards and ensure their continuous growth through mentorship and accompaniment. Panelists noted that parishes have not always created a welcoming space for young adults who are in a transitional phase of their lives and have failed to bring on board young leaders who desire to serve the Church in ministerial roles but can’t because of the inability to earn a living wage or pay off student loans. For the waves of young adults who leave the Church, leaders must also learn to develop creative outreach programs where young adults thrive and feel essential.

Those messages rang loud and clear from the panel of young adult Catholic leaders, Jonathan Lewis, Assistant Secretary for Pastoral Ministry and Social Concerns at the Archdiocese of Washington, moderated the panel. He began by sharing a phrase he learned from the archdiocesan department for special needs: “Not about us, without us.” He said that the same is true for young adults. Young adults need to be an integral part of the conversation in our Church.

Nicole Perone, Archdiocesan Director of Adult Faith Formation with the Archdiocese of Hartford, Connecticut, said, “Engaging young people is a best practice and a responsibility that we have...”
as a Church.” In searching for reasons behind the disaffiliation of so many young Catholics today, Perone, a delegate to the Vatican’s Pre-Synod on Young People, the Faith, and Vocational Discernment, cited what she called a “pay-your-dues mentality” that tells young adults they have to wait until they’re old enough to “pay their dues”, they are not going to be here to participate. So we have to own that they are protagonists now in this moment and engage them in this moment. Ms. Perone added, “That doesn’t mean we have to cast aside anyone else to make room for young people...we are a big enough Church. Now is the time to help young people discern their gifts and to empower them. And for all of us to make a conscious effort to accompany young people... to develop a personal relationship with them and walk with them.”

Taking Advantage of Gateway Moments

The task of building an intergenerational Church needs to start by taking advantage of what several panelists described as “gateway moments,” when young people reach out to the Church to become involved or get married, for example. Which, in turn, raises the question, are they being received in a loving, welcoming way, or are they being coldly put off by rules and barriers? “If a young person is reaching out to the Church in some capacity... and we slam the door,” suggested Ms. Perone, “we’ve lost the biggest opportunity we could ever have to engage this young person.”

We must learn to “embrace those gateway moments as evangelizing moments, as catechetical moments, as formational moments, as collaborative moments...” Ms. Perone would go a significant step further. One of her dreams “is to have a young person on every single Church board, and every single parish council in the United States” she offered enthusiastically. “That sounds huge, but it’s not impossible.”

Jennifer Baugh set out a vision of how to reach more young adult Catholics through initiatives that foster Catholic identity, a sense of belonging, and a call to action. “With young adult ministries, we’re often reaching the same types of people over and over again,” said Ms. Baugh, Founder and National Executive Director of Young Catholic Professionals. “If we really want to extend this new culture of leadership, we have to be creative in the way we’re marketing our events so we can reach the people who would not normally come....” said Baugh.

What We Can Learn from Young Adult Programs

As part of his advice for creating a new culture with young leaders, Darius Villalobos, Director of Diversity and Inclusion for the National Federation for Catholic Youth Ministry, exhorted Catholic leaders to first recognize what existing programs are working for young people in the Church. He looks to programs like Jesuit Volunteer Corps, Franciscan Mission Service, ESTEEM, and other Catholic lay programs that marshall the services of young people to serve and grow into leadership – and to encourage more of them. “Young people are looking for places to live out their values...” and at the same time, he conceded, “a lot of young people don’t find a space in the traditional parish anymore because parishes are not built specifically for young people. Many parishes are there to serve families, and when you’re in that in-between space where you’re not quite sure what your vocation is calling you to... it’s hard to know where you fit in.” Instead, he pointed out that young Catholics are increasingly finding expression for their values, concerns, and their faith by gathering in small movements, coffee houses, bars, and homes.

Access to Formation

“We have to celebrate our diversity,” remarked Darius Villalobos, giving the example of cultural, socio-economic, and gender diversity. “We often see it as a challenge and a burden rather than something that makes us better and stronger...” [but for young adult Catholics] diversity is their norm.” He also finds troubling the Church’s inability to draw qualified and passionate young people into the realm of ministry for lack of a just wage. “I’ve seen too many young adult ministers burn out and leave ministry and service to the Church because they can’t afford to stay,” he rued. “Budgets are moral documents…. If we are not willing to put the money aside so to make sure that these young people who are ready to lead, who are willing to lead, can actually be leaders in the Church, we are only doing a disservice to ourselves.”

Katie Diller Gleason touched on that issue by noting that investment in lay formation is critical. She lifted up places like University of Notre Dame and University of
Engaging young people is a best practice and a responsibility that we have as a Church.

— NICOLE PERONE

Dayton that each have graduate programs in theology and pastoral ministry that offer fully-funded scholarships “so that those coming out of these excellent programs are not crippled by debt.” Equally impressive to Ms. Diller Gleason, who is Coordinator of Campus Ministry for the Diocese of Lansing, is the fact that both advanced ministry programs integrate lay formation with clergy formation. “Clergy will always be the minority in the room... so it’s important to have their formation alongside lay men and women,” she said. “It helps establish a foundation of trust... built on shared language and mutual values for future collaboration and co-responsibility.”

RECOMMENDATIONS FOR YOUNG ADULT CATHOLICS AT THE LEADERSHIP TABLE

Structures for Including Young Adults in Leadership Positions
• Appoint young adults from diverse demographics to leadership positions on diocesan councils, parish councils, and Catholic nonprofit boards; provide orientation and support for their leadership development
• Make a public commitment with benchmarks to ensure young adult representation on boards and councils on an ongoing basis
• Recruit leaders of different ages at the diocesan and parish levels who reflect the demographics of the local Church
• Create an ongoing process in order to listen to and solicit feedback from a diverse group of young people in multiple formats such as in-person meetings, social media, surveys, etc.
• Provide formal mentorship opportunities and accompaniment to equip young adult Catholics for leadership positions in the Church and world
• Involve more young adult leaders in Catholic media and ensure their participation at the decision-making table

Support for Emerging Catholic Leaders

FORMATION AND LEADERSHIP DEVELOPMENT
• Provide leadership development for young adult Catholics in a variety of settings such as colleges and parishes to prepare them for roles in parish and diocesan life
• Include servant leadership, faithful stewardship, intercultural competencies, collaborative ministry, etc. in leadership development trainings
• Provide equal financial resources for the ministerial education of young lay ministers and clergy; consider a national scholarship fund or loan forgiveness program
• Invest in the education and ongoing formation of young Latino/a leaders and other cultural groups who are not adequately represented in ministerial leadership
• Educate seminarians with their lay peers; look at best practices among religious communities and consider use of Catholic higher education partnerships

PERSONNEL MANAGEMENT
• Hire personnel for young adult ministry or share resources between parishes
• Provide a living wage, robust benefits, and other support for lay leaders so young adults can afford to work for the Church
• Offer scholarships to train and empower ministers in places where there is a lack of funds for youth and young adult ministry
• Make succession plans to include young adults in leadership positions so that ministries and the broader mission continues
Gateway Moments and Attention to Diversity

**GATEWAYS**
- Extend ministries to meet the spiritual, social, and physical needs of young adults
- Provide pastoral care for young adults at different life stages (i.e. college, workforce, single, married, married with children) and at key transitional moments (i.e. moving from college to parish or to a new town)
- Make gateway moments positive encounters (i.e. new parish registration, RCIA, baptism, wedding, funeral) and equip all parish staff to lead with welcome rather than barriers
- Engage young adults, both the affiliated and unaffiliated, through works of justice, the intellectual tradition, missionary evangelization, etc.
- Designate a parish to provide robust young adult ministry if individual parishes in the area do not have the capacity or resources to do so

**INCLUSION**
- Ensure young adult ministry serves a broad range of people, including those at community college, those who do not attend college, those who hold multiple jobs, etc.
- Minister to diverse cultural communities and those on the peripheries
- Provide pastoral care to young adults who have been hurt inside or outside the Church
- Make Masses and ministries more accessible at times that work for those who may have varying commitments with school, work, or family
- Equip Catholic leaders to deepen their understanding of the issues that young adults face around the environment, race, immigration, gender, LGBTQ matters, etc.
- Create a safe space for dialogue about the real and often painful differences in the Church, as well as struggles and questions that young adults have
- Explore ways to help young adults feel valued and that they have gifts and diverse perspectives to contribute to the Church

Ministry with, for, and by Young Adults

**FOUNDATIONS FOR MINISTRY**
- Invest in innovative approaches that engage young adults; involve them in creation and implementation of the ministries
- Promote a culture of hospitality so as to welcome and listen to young adults; get to know them by name and personally invite them to socialize, learn, pray, and share their gifts with others
- Equip parents, youth ministers, catechists, teachers, and others with the skills necessary for effective youth ministry in order to help youth flourish later as young adults
- Integrate social media and other online communication methods into young adult ministry
- Expand campus ministry to all colleges and community colleges, through individual campus ministry centers or through partner parishes

**OPPORTUNITIES FOR MINISTRY**
- Accompany young adults in their faith journey and help them to encounter Christ in new ways and experience community
- Form small faith groups and peer-to-peer groups, both within and outside the parish
- Provide service opportunities
- Connect young adults to resources for spiritual development, as well as vocational and professional discernment
- Support young adults in living out their Catholic identity and values in secular professions
- Share information about one-year volunteer programs, missionary opportunities, lay apostolates and ecclesial movements, and other young adult service or ministry programs

**ONGOING RESEARCH**
- Survey existing young adult leadership development programs to determine best practices
- Commission research on salaries, benefits, and educational debt among young pastoral staff at the parish and diocesan levels and create a roadmap for just policies and practices
- Continue to invest in research on young adult Catholic engagement such as the “Young Catholic America” study by Christian Smith and the “Going, Going, Gone” study by Saint Mary’s Press and Springtide Research
- Commission research on successful retention practices from other sectors to address disaffiliation trends among young people in the Church
At the end of the Catholic Partnership Summit, Leadership Roundtable shared the organization’s preliminary commitments in response to what had transpired during the convening:

1. Amplify the best practices and insights from this Summit
2. Distribute a comprehensive report from this Summit
3. Promote active engagement of young adults in the Church, in particular through the ESTEEM program
4. Expand our partnerships that promote a co-responsible culture of leadership and management:
   a. Collaborate with colleges and universities
   b. Make more widely available our Catholic Standards for Excellence
   c. Advance the idea of a “Dallas Charter” for finances
   d. Commit to greater diversity in the composition of our board of directors
5. Explore how to expand synodality opportunities

Leadership Roundtable’s Next Steps
The Mission Management Model is a system-wide approach for Catholic dioceses and other Catholic institutions to achieve management and leadership excellence in service of their mission. Its six stages provide an assessment and customized plan that draws upon Leadership Roundtable’s suite of services in order to assist Catholic leaders in creating a vibrant Catholic experience for the people they serve.

Our Mission Management Model is built on years of experience that show us that small steps are the building blocks for transformative change. At the pace they choose, dioceses move through the six stages — assisted by their trusted partner, Leadership Roundtable. One of the keys to success is for the diocese to only take on as much as is realistic for them to do at any given time. While the time frame for achieving stage six varies, each diocese is encouraged to focus on achieving continuity of progress in manageable periods. Ongoing evaluation of progress and benchmarking built into the Model allows dioceses to see how far they have come and to see the impact of their work on their mission.

Leadership Roundtable’s Next Steps: Mission Management Model

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Engaging Students to Enliven the Ecclesial Mission (ESTEEM) develops the capacity of college students to take leadership roles in parishes after they graduate. The program provides training and support for students to recognize their baptismal call to use their gifts and talents in service to the Church. Currently, the program serves a broad diversity of students on both public and private campuses across the United States. Leadership Roundtable is committed to working with our partner, the Saint Thomas More Catholic Chapel and Center at Yale University, to expand ESTEEM’s reach and staffing capacity.
Leadership Roundtable was honored to present the J. Donald Monan, S.J. Distinguished Catholic Philanthropy Medal to three Catholic families who have collaborated with Church leaders to make a significant impact on a parish, diocese, or other Catholic ministry in the area of Church management and leadership.

“...those we honor this evening are distinguished for their deep commitment to serve the people of God through their generous and steadfast investment of their time, talent, and treasure.”

-Archbishop Christophe Pierre, Apostolic Nuncio to the United States

2020 Monan Medal Recipients

The Montrone Family
Received by Michele Montrone Cogan

The Raskob Foundation for Catholic Activities, Inc.
Received by Patrick W. McGrory and Noelle M. Robinson

Mark and Karen Rauenhorst

2019 Monan Medal Recipients
Peter and Carolyn Lynch, Jim and Molly Perry, John and Dorothy Shea

Mark and Karen Rauenhorst are dedicated Catholic lay leaders within the Archdiocese of Saint Paul and Minneapolis, and beyond. They have devoted years to serving on the board of directors for multiple charitable, academic, and faith-based organizations. They also initiated the Mark and Karen Rauenhorst Foundation more than 20 years ago as a way to support the broader community as part of their faith. Mark serves on the board of directors of Ascension Catholic Academy, Creighton University, GHR Foundation, and Catholic Relief Services, and the advisory council for Mendoza College of Business. Karen previously served as acting President of St. Catherine University in St. Paul, and currently serves on the boards of Catholic Relief Services Foundation, Corporate Board of the Archdiocese of St. Paul and Minneapolis, FADICA, and NCEA. Mark and Karen have been married for 45 years, have four adult children, and seven grandchildren.

The Raskob Foundation for Catholic Activities, Inc. was established in 1945. John J. and Helena S. Raskob were Catholics with a simple but profound vision. They believed that God had blessed them abundantly, and that they, in turn, were called to give thanks through personal service and generous financial support of the Catholic Church. They envisioned that this call to service and religious philanthropy would be a legacy for their descendants, to be handed on from generation to generation. They modeled an approach to philanthropy emphasizing behind the scenes, practical, and pastoral grant-making. The Foundation that John J. and Helena S. Raskob established continues in their memory, with 140 family members, reaching to five generations, and has distributed over $200 million in grants to Catholic organizations and programs throughout the world.

Sandra and Paul Montrone, natives of Scranton, PA, are descendants of Italian immigrants, a culture that placed family and religion at the center of life. Fittingly, they established the Penates Foundation in 1983, named after the Roman god of family. Since its inception, the Foundation has actively involved the Montrone family members in its administration and the charities it supports. These include a broad range of Catholic organizations – here in the U.S. and abroad – including African Sisters Education Collaborative, Mary Mother of Peace in Medjugorje, Catholic Relief Services, Catholic Charities, Catholic Schools Foundation, Good Shepard Services, St. Ann's Shrine Basilica, St. Charles Children's Home, and a wide variety of schools, churches and religious groups. Sandra and Paul have been married for 57 years, have three children – Michele, Angelo, and Jerome – and 11 grandchildren.
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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.