Promoting a Culture of Co-Responsible Leadership

2020 IMPACT REPORT
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 of the gospel message. Relationship is at the heart of mission.

—PARTICIPANT FROM 2020 CATHOLIC PARTNERSHIP SUMMIT

In Isaiah 40:31, the prophet says that “They that hope in the LORD will renew their strength, they will soar on eagles’ wings.” Leadership Roundtable is a service of hope to our Church in the midst of crisis. Like the flock of birds flying in circular unison on the cover of this report, we all are one in the body of Christ, working together in a spirit of synodality for God’s glory and the call to be disciples of Christ. Just as these birds rise from the earth to the light in the sky, so do we work to lead our Church beyond these crises toward a new dawn by promoting a culture of co-responsible leadership.

Dear Friend,

This past year has brought unprecedented challenges to the Catholic Church and our world. As we continue to address the twin crises of abuse and leadership failures, we also now face a global pandemic that has changed how we worship, gather and connect with one another.

Despite its challenges, the past year has brought us together as the body of Christ to ensure the well-being of every person in our community, and to restore faith in the Church and in our Lord, Jesus Christ. We are reminded that God has given us each unique gifts as members of the body of Christ and that when we use these gifts, we will accomplish great things (cf. 1 Cor. 12:12-27). Leadership Roundtable is grateful for the gifts God has given us as faithful Catholics, called by the Holy Spirit, to think with the Church and put ourselves and our gifts at its service.

Our mission is simple: in partnership with lay, ordained, and religious leaders, we identify and implement best practices in management and leadership to promote a culture of transparent, accountable and co-responsible servant leadership for a healthy, thriving Church.

In this Impact Report, you will find inspiring stories of how Leadership Roundtable has impacted both the leaders of the Catholic Church and the people who they serve.

An unprecedented 2020 provided unique opportunities for Leadership Roundtable to offer our services and programs in new ways, to convene Catholic thought-leaders, and to help the Church serve all people, but especially the most vulnerable, during the pandemic. With your support, together with Cardinals O’Malley, Cupich and Tobin; Archbishop Gomez, and the Papal Nuncio, Archbishop Christophe Pierre; as well as leaders of major national Catholic institutions, we hosted the 2020 Catholic Partnership Summit where diverse leaders created clear, actionable recommendations to promote a new culture of leadership in the Church. We convened the 16 executive leaders of the Church in the United States — comprising Catholic charities, social services, healthcare, education, finance, philanthropy, the U.S. Conference of Catholic Bishops, and men’s and women’s religious communities — to respond collectively to the pandemic. And we transitioned our services and programs online, ensuring our partners continued access to high-demand workshops, coaching sessions, and consultations.

As we reflect on 2020, we are deeply grateful for each partner who works with us, each donor who invests in our mission, and each Catholic leader working to build a better future for the Church. It is because of you that our Church remains a beacon of hope in these challenging times.

With sincere gratitude,

Elizabeth McCaul  
Co-chair of the Board

Geno Fernandez  
Co-chair of the Board
Opportunity in the midst of crisis: Serving those most in need during the pandemic

Today, we find ourselves facing an unprecedented health and financial crisis. But as Pope Francis reminded us: In the midst of a crisis there is also opportunity.

The well-being of the Catholic Church in the United States impacts the well-being of every community in our country, particularly those living on the margins of our society. Leadership Roundtable serves as a resource for the dioceses, religious communities, and Catholic organizations who partner with us, but it is those our Church serves who are impacted most by the work we do.

Responding Quickly to the Pandemic
In February 2020, we convened more than 260 Catholic leaders in Washington, D.C. for the Catholic Partnership Summit. Leaders from across the United States and Rome gathered to listen to and learn from one another, and collectively recommend best practices to help the Church move towards a culture of co-responsible leadership.

From these dialogues emerged numerous themes, (read the full executive summary starting on page 12 of this report), including an understanding that to address any crisis, co-responsibility, transparency, and accountability are needed. Together we also recognized that:

- there is a need for Church leaders to engage the diverse gifts and expertise of both the laity and ordained
- philanthropic commitment and faithful stewardship are required to address current disparities
- young adults need to have a seat at the leadership table and be part of decision making
- Church leadership must reflect the diversity of Catholics
- the Church needs to restore trust through servant leadership.

Covid-19 Leadership Summits
Building upon the momentum of our in-person Summit, we quickly convened two virtual roundtables of top Catholic leaders to address the pandemic. Around the virtual table we brought together an historic summit that included the leadership from:

- U.S. Conference of Catholic Bishops
- Catholic Relief Services
- Initiative on Catholic Social Thought and Public Life at Georgetown University

Every crisis contains both danger and opportunity.
— POPE FRANCIS
• Catholic Health Association
• Association of Catholic Colleges and Universities
• FADICA (Foundations and Donors Interested in Catholic Activities)
• Diocesan Fiscal Management Conference
• Catholic Charities USA
• National Catholic Education Association
• the Papal Nuncio
• Leadership Roundtable
• Catholic Extension
• Leadership Conference of Women Religious (LCWR)

For the first time ever, this group of leaders — representing the U.S. Conference of Catholic Bishops, Catholic education, social services, and healthcare — convened in solidarity to share their unique perspectives on the COVID-19 pandemic, and to collaborate for solutions to emerging needs.

Sharing the Good News

The discussion at these virtual summits highlighted the innovative ways Catholic leaders have responded to the pandemic.

Together, we recognized the need to coordinate communications efforts to share the good news of the Church’s immediate response to the pandemic. The hashtag #CatholicCares was launched along with a social media campaign that highlighted inspiring daily acts of compassion, care, mercy, and service by our Church’s ministries and apostolates.

#CatholicCares has been shared countless times since its inception this spring and woven a narrative of our faith response to the pandemic with stories such as:

• Neil Klingensmith, a computer science associate professor at Loyola University in Chicago, who used his school’s lab equipment to manufacture face shields for healthcare workers.

• Sr. Libby Fernandez, who creatively ensured that her order’s cycle-based ministry, Mercy Pedalers, could continue to distribute food at a safe distance to those experiencing homelessness in Sacramento, Cal.

• Sr. Astridah Banda, a Catholic nun and social worker in Zambia, who transformed her radio show to provide information about COVID-19 and answer listener questions.

Raising Critical Funding

During the two COVID-19 Leadership Summits, Catholic leaders highlighted how the pandemic stymied traditional ways of giving to the Church and created an immediate need for parishes and ministries to accept contributions online.

Together, we were able to identify an avenue for fundraising that would enable our Church to both immediately raise funds online and continue to serve the growing number of people in need. We leveraged the success and capability of the online giving platform, #iGiveCatholic, to help Catholic organizations across the country raise critical funding early in the pandemic. #iGiveCatholic is an online platform that accepts donations from supporters and distributes those funds directly to participating Catholic organizations. By registering as a participating organization with #iGiveCatholic, parishes, ministries, schools and foundations were able to rapidly receive online donations from supporters during the pandemic.

Moving forward

As we collectively weather the COVID-19 pandemic, Leadership Roundtable remains a responsive partner to Catholic leaders. We have moved our services and programs online, are planning meaningful virtual convenings, and are continuing to help the Catholic Church serve those in most need. Whether providing food to those who are hungry, shelter to those without a home, or healthcare to those facing illness, Catholics have come together as the body of Christ to respond to the pandemic ethically, with courage, and a renewed spirit.
How online leadership training enabled the Diocese of Cheyenne to continue fulfilling its mission during the COVID-19 pandemic

As one of largest dioceses by land mass in the United States, it can take hours to trek across portions of the Diocese of Cheyenne in Wyoming. Among Catholic leaders in the Diocese, the vast, rugged terrain of the state has long presented challenges to meeting in person. So when the COVID-19 pandemic further limited in-person gathering, the Diocese needed to find a flexible way to continue working with Leadership Roundtable to equip pastoral leaders with the best practices to serve and fulfill their missions, without meeting face-to-face.

“Moving to online training has worked very well for us,” said Tammy Skala, director of Human Resources for the Diocese. “It has really opened our eyes, has allowed everyone to attend, and allows us to spend less time on the road and more time in ministry.”

At 98,000 square miles, the sheer geographic size of the Diocese of Cheyenne can leave priests and lay leaders both isolated in their communities and burdened when needing to travel long distances across a region that Cheyenne Bishop Steven R. Biegler described as “the frontier.”

Before the pandemic, some leaders were planning to take several days away from ministry to travel and attend Leadership Roundtable’s Catholic Standards for Excellence training. Being able to attend the training virtually in October allowed pastoral leaders in the Diocese to remain in their ministerial locations and spend the time they would have been travelling on their mission.

An Online Copilot

“A Wyoming native, Fr. Carl Gallinger likened Leadership Roundtable’s ability to continue providing our programs during the pandemic to ice hockey, a popular sport in the region. With good, solid ice, hockey players are able to skate well and fans enjoy the game, he said. The training from Leadership Roundtable is like that solid sheet of ice, providing Catholic leaders with the foundation necessary to fulfill their mission and serve those in need in a time of crisis. “The work we’ve done with Leadership Roundtable has raised the bar and called forth the very best of us in pastoral ministry,” said Gallinger, who serves as pastor of St. Joseph Catholic Church in Cheyenne and vicar general for the Diocese.

Stronger Stewards of Faith

Across the Diocese of Cheyenne, the flexibility of virtual gatherings has given leaders both more time to reflect upon the materials and to integrate the best practices into their ministry.

“We get so focused on what we’re doing ourselves, that we don’t realize what others are experiencing,” Skala said. “We found during these virtual training sessions that individuals were more willing to open up about their positions, what they do, and what their struggles are. The trainings are making us continually work to better ourselves. We don’t just do the trainings, we put it into practice.”

Due to the increased flexibility, Bishop Biegler said the Diocese hopes to maintain a virtual component of their work with Leadership Roundtable into the future.

“At the end of the day, it’s all about mission,” Bishop Biegler said. Because of the virtual trainings, the Diocese of Cheyenne, its parishes and Catholic organizations have been able to continue to move explicitly toward excellence in practices throughout the pandemic and “that supports the mission,” he said. “As a result, we are better stewards of the Church and of the mysteries of God.”

"Because of the pandemic, we have had to be a stronger team. The work we’ve done with Leadership Roundtable has strengthened both our team and our structure, and has helped us lay the foundation so we can weather this pandemic."

— BISHOP STEVEN R. BIEGLER

FLEXIBILITY, FOUNDATION AND FAITH on the Frontier
HOPE for the Future

2020 Catholic Partnership Summit elevates young leaders’ voices, leaves global impact

Seated at every table of the 2020 Catholic Partnership Summit was someone who is not often among the decision makers of the Catholic Church: a young adult. During the two-day event, young adult leaders were seated at every roundtable and included in every discussion; most notably, an all-young-adult final panel of the Summit.

Directly addressing young adult leadership in the Church, the final panel featured five young adults who are experts in faith formation, leadership, ministry, and diversity and inclusion. Each panelist highlighted the importance of including within Church leadership young adults who represent the diversity among Catholics in order to create a culture of co-responsibility.

“Engaging young people is a best practice and a responsibility that we have as a Church,” said panelist Nicole Perone, who serves as Archdiocesan Director of Adult Faith Formation with the Archdiocese of Hartford, Conn.

An Essential Role
In his homily at the opening Mass of the Summit, Archbishop Wilton D. Gregory, of the Archdiocese of Washington, emphasized how young adults play an essential role in the body of Christ, and how desperately they are needed in Church leadership.

The discussion and recommendations for welcoming young adults to the leadership table left Summit attendees with hope for the future of the Catholic Church, despite its present challenges.

“I am leaving feeling less alone,” one attendee said. “I am leaving feeling hope, but also with the sense that there is so much work to do.”

Changing Church Culture
The recommendations from the Summit outlined actionable steps Catholic leaders can take to establish the structures that include young adults in leadership positions and support these emerging leaders including:

- Investing in ministerial education and leadership development of young adults of diverse cultures and backgrounds
- Making a public commitment with benchmarks to ensure young adult representation on boards and parish councils
- Understanding the issues young adults face and creating safe spaces for dialogue about these issues
- Providing a living wage, robust benefits and support for lay leaders so young adults can afford to work for the Church.

A Global Impact
Globally, the recommendations of the Catholic Partnership Summits have been held up as a model for addressing crises in the Church. This summer, the Australian Catholic Bishops Conference and Catholic Religious Australia released their groundbreaking governance review report titled, “The Light from the Southern Cross: Promoting Co-Responsible Governance in the Catholic Church in Australia.”

The report was requested by the bishops’ conference and religious of Australia following the government’s Royal Commission into the Institutional Responses to Child Sexual Abuse. In authors include 14 eminent lay leaders and four clergy members. Leadership Roundtable staff met with the report’s authors to share our expertise convening Church leaders in meaningful discussion surrounding a culture of co-responsible leadership within the Church, and the services and programs we provide to Catholic leaders.

The 208-page report repeatedly referenced Leadership Roundtable’s Catholic Partnership Summits and reports as models for how the Church should address the twin crises of abuse and leadership failures. Throughout, the report cited Leadership Roundtable’s programs, services, and convenings as best practices and encouraged dioceses and parishes in Australia to implement their recommendations.

In total, the report set forth 86 recommendations to promote co-responsible governance of the Church in Australia, ranging from the selection of bishops to the importance of including women in decision-making.

Engaging young people is a best practice and a responsibility that we have as a Church. – NICOLE PERONE, PANELIST
Leadership Roundtable convened our 2020 Catholic Partnership Summit in February 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.

This Executive Summary contains the major themes and high-level proposals that emerged from the panelists and table conversations. The full report “We are the Body of Christ: Creating a Culture of Co-Responsible Leadership” 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. The full report is available on our website at leadershiproundtable.org.

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 and 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, accountability 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.

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. 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.

A Culture with Young Adult Catholics at the Leadership Table
“The Catholic Church is one of the biggest delivery mechanisms for the support of underserved segments of the community, particularly the immigrant community,” Joe said. “That fit the profile of what we collectively wanted to do.” Joe is CEO of Alphadyne Asset Management and a life-long Catholic.

But Joe and his partners wanted to ensure their gifts could be leveraged for greater service than direct-dollar giving could achieve. Giving to the work of Leadership Roundtable was an ideal fit for that goal.

Joe first learned of Leadership Roundtable through Geoff Boisi, who he had worked for at J.P. Morgan and who later became an investor in Alphadyne. Geoff founded Leadership Roundtable in 2005.

“Geoff inspired me with what he has created at Leadership Roundtable,” Joe said. “Geoff’s commitment to leadership and his sense of how Catholics can partner together — lay, religious and clergy — to get more accomplished really resonated with me.”

Joe grew up in the Church and attended Catholic schools, including St. Joseph’s University in Philadelphia, where today he serves on the Board of Trustees. The lessons of humility and trust instilled in him through his Catholic, and particularly Jesuit, education and upbringing have guided his personal leadership and career.

When he initially joined Leadership Roundtable’s Board of Directors, Joe was looking for an opportunity to get behind constructive efforts to address the challenges that the Church faces. Geoff’s vision to take business best practices and apply them appropriately to the needs of the Church resonated with him, Joe said.

By attending the 2020 Catholic Partnership Summit and serving on Leadership Roundtable’s board, he also saw how Leadership Roundtable’s work impacts not just the Church and its leaders, but the people who the Church serves.

“It reinvented my perspective on what more I could be doing to support efforts that positively influence the leadership culture of the Catholic Church in the United States and, by extension, positively influence the lives of individuals,” he said.

The Alphadyne Foundation was established as a 501(c)3 organization in June 2020 with a goal to invest in organizations that can leverage their gifts to have a greater impact on those most in need during the pandemic. Despite being the only Catholic among Alphadyne’s partners, Joe said it was straightforward to demonstrate to Alphadyne’s founding partner Philippe Khuoung-Huu and other partners that investing in Leadership Roundtable provided the kind of impact they sought.

“A dollar of support to an organization like Leadership Roundtable has an exponential impact because of the leverage it provides,” he said. Supporting Leadership Roundtable’s work equips the leaders of the Catholic Church, who are among those on the frontlines of the pandemic, to best serve those in most need.

Because of Geoff’s partnership and support of Alphadyne over the past 15 years, Joe and Philippe gratefully named The Alphadyne Foundation’s gift in Geoff’s honor.

“Geoff is certainly an inspiration to us,” Joe said.
568 pastoral leaders participated in our programs and coaching.

260 CATHOLIC LEADERS attended our 2020 Catholic Partnership Summit

82% of Catholic Leadership 360 participants said the program positively impacted how they perform the leadership and management aspects of their ministry.

5,000+ people attended presentations by Leadership Roundtable.

You...

Made possible the convening of leaders from 64 dioceses across the United States and Rome at the 2020 Catholic Partnership Summit, including 34 young adult leaders.

Underwrote more than 15 presentations on leadership best practices attended by more than 5,000 people.

Supported our input into the Australian Bishops’ Conference’s groundbreaking report on Church governance.

Helped us train more than 500 pastoral leaders and seamlessly transition our offerings to online.

Enabled us to promote co-responsible Church leadership through 30 media articles, podcasts, radio programs, television spots and mentions.

Supported the Catholic Church’s service during the COVID-19 pandemic by convening 16 of the top U.S. Catholic leaders representing the USCCB, Catholic education, social services, and healthcare to collaborate for solutions.

Made it possible to have now equipped Catholic leaders in a total of more than 75% of the dioceses in the United States with best practices of transparency, accountability, and co-responsibility.

Continue to help restore hope in the future ministry of our Church.

Thank you!
Spotlight on New Board Co-Chairs

Elizabeth McCaul recently became Board Co-Chair for Leadership Roundtable, a Catholic non-profit working with Church leaders to promote best practices and accountability in management, finances, and human resource development. She has an extensive career in banking and finance. She is currently a Member of the Supervisory Board of the European Central Bank. Previously, she worked for Promontory Financial Group in a variety of leadership positions. She founded and served as the Partner-in-charge of the New York office, she was CEO and Chair of Europe, and Global Head of Strategy. She served as NY Superintendent of Banks from 1997-2003. For the first decade of her career she was an investment banker at Goldman Sachs. For over two years she worked in the Vatican while at Promontory. In 2013, she led a forensic review at the Institute for Works of Religion (IOR) commonly known as the Vatican Bank. She was an adviser to the Organisation of the Economic-Administrative Structures of the Holy See (COSEA) to develop governance and financial reforms. And, she assisted the Knights of Malta to enhance its governance. She serves on the Georgetown University Board of Regents and is a Trustee of Saint Dominic’s Parish in Oyster Bay, NY.

Geno Fernandez is responsible for integrating Aon’s broking strategy, data and analytic services, reinsurance services, and risk advice and consulting practice. He develops and implements innovative insurance solutions, leads executive relationships with key trading partners, and supports Aon’s key clients with expert risk management. Previously, Geno served as the Chief Underwriting Officer of Zurich North America (2012-2018) and a senior partner at McKinsey & Company (2000-2012). Geno is a long-time and active member on local and United States non-profit boards, including Leadership Roundtable (where he is an Executive Committee Member and Treasurer), the Finance Council of the Archdiocese of Chicago (where he is an Executive Committee member and chairs the Risk Management Committee), and the Board of Advisors for Catholic Charities. He is the Chairman of the Chicago Catholic School Board, which governs and operates 215 elementary and high schools in Chicago and land. Geno is a Rhodes Scholar, and has received a Doctorate in Philosophy from Oxford University, a Doctorate in Sacred Theology from the Pontifical University of St. Thomas Aquinas, and a B.A. summa cum laude from the University of Notre Dame.

Elizabeth McCaul
Member of the Supervisory Board, European Central Bank

Geno Fernandez
Chief Broking Officer, Aon plc

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### Board and Staff

**BOARD EXECUTIVE COMMITTEE**

- **Geno Fernandez**, Co-Chair and Treasurer of the Board
- **Elizabeth McCaul**, Co-Chair
- **Geoffrey T. Boisi**, Founder of the Board
- **Kathleen McChesney**, Secretary of the Board

**BOARD MEMBERS**

- **Kevin K. Carton**
- **Kendra E. Davenport**
- **Daniel Denihan**
- **Rev. Michael J. Garanzini, SJ**
- **Michael Brough**
- **Kevin K. Carton**
- **Daniel Denihan**
- **Rev. Michael J. Garanzini, SJ**

**STAFF**

- **Jim Dubik**, Managing Partner
- **Michael Brough**, Program Manager
- **Peter Denio**, Program Manager
- **Deacon Patrick Stokely**, Senior Program Manager
- **Kerry Robinson**, Partner
- **Andrea Blanco**, Program Manager
- **Kim Smolik**, Partner
- **Susan King**, Senior Consultant
- **Rev. John J. Wall**, Senior Program Manager
- **Chloe Boudreaux**, Fellow
- **Bryan King**, Fellow
- **Joanne Ruddy**, Executive Assistant and Event Coordinator
- **Kate Alexander**, Communications and Marketing Manager

**PROJECT COORDINATORS AND CONSULTANTS**

- **Jim Lundholm-Eades**, Senior Consultant
- **Rev. Paul Holmes**, Advisor, Clergy Leadership Formation
- **Dominic Perri**, Senior Leadership Consultant

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### Financials

#### Public support and revenue

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<td><strong>Supporting services</strong></td>
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<td><strong>Total expenses</strong></td>
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#### Expenses

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#### Net assets

- **Total Net Assets**: $1,876,057
- **Temporarily Restricted**: $1,836,423
- **Unrestricted Assets**: $39,634

**Leadership Roundtable** has total assets of $1.876 million that consist of:

**Net assets at end of year**

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**This summary was prepared by Leadership Roundtable from its financial statements, which were prepared by Matthews, Carter & Boyce. The complete financial statements, including the related notes and auditor’s report, are available upon request.**
The above foundations, organizations, and individuals made generous gifts between January 1, 2019 and December 31, 2019.

If we neglected to accurately recognize your generosity, please accept our apologies and notify us so that we may correct our records.

We end our year much as we began it, celebrating our supporters. In February, we honored three Catholic families with the J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal. Each family has 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

2019 Monan Medal Recipients

Peter and Carolyn Lynch, Jim and Molly Perry, John and Dorothy Shea
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.