Towards a New Culture of Leadership

Impact Report | FY 2018
Rather, whoever wishes to be great among you shall be your servant.... Just so, the Son of Man did not come to be served but to serve....”

—MATTHEW 20: 26, 28
Dear Friend,

There has been one word that keeps surfacing during this year of crisis in our Church. That word is leadership. Catholics recognize that we are not only facing a crisis of abuse, but also a crisis of leadership failures that covered up the abuse.

**Gratefully, Jesus shows us a different way of leadership.** The gospel stories are replete with powerful stories of servant leadership: Jesus identifies and empowers the apostles, washes the feet of his disciples, and gives up power and privilege to save others. He shows us that another way of leadership is possible.

**As a Church, we need to open the door to a new culture of leadership and management in our parishes, dioceses, and other Catholic institutions.**

When Leadership Roundtable began nearly 15 years ago, few Catholic leaders talked about “Church management” or “leadership culture.” Today, dioceses host our pastoral management trainings for their clergy and laity, some seminaries have begun offering Church management and leadership courses, and we helped prepare faculty to offer the first Church management program at a pontifical university in Rome!

In this Impact Report, you’ll read about the work we accomplished in 2018 and early 2019 to address the crisis. This included work with over 50 dioceses, religious orders, and others, as well as the Catholic Partnership Summit where we convened Catholic leaders from across the country to identify best practices and recommendations to promote accountability, transparency, and co-responsibility.

**Thank you for partnering with us to create a new culture of leadership and management for our Church.** Together, we’ll help our Church move towards a new horizon where children are safe, faith communities are vibrant, and Jesus’ model of servant leadership is lived.

With gratitude,

Robert Gasser  
Chair of the Board

Kim Smolik, Ed.D.  
CEO

Above photo: Dave Hrbacek/Catholic Spirit
<table>
<thead>
<tr>
<th>AUGUST</th>
<th>SEPTEMBER</th>
<th>OCTOBER</th>
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<tbody>
<tr>
<td>Provided individual consultations and resources for Catholic leaders in more than 50 dioceses, religious communities, and other Catholic institutions across the country.</td>
<td>Created a section on our website about the crises for Catholic leaders to easily access resources and support.</td>
<td>Convened a meeting in October for bishops and lay experts as they prepared for the November meeting of the bishops’ conference. The group looked at the twin crises and identified three approaches for addressing it with actionable recommendations.</td>
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<td>August – Present &gt;&gt;&gt;</td>
<td>Helped Catholics understand the dual nature of the crises and practical solutions for it with dozens of media interviews, op-eds, podcast appearances, etc.</td>
<td>September – Present &gt;&gt;&gt;</td>
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Leadership Roundtable was founded in the wake of the abuse crisis of 2002. The clergy, religious, and lay Catholics who gathered at our first convenings knew that the Church was facing twin crises: a crisis of abuse and a crisis of leadership failures. If the Church was going to solve the abuse crisis, it needed to promote accountability and best practices in its leadership and management. For nearly 15 years, Leadership Roundtable has developed and implemented services to help the Church in areas of management, finance, human resources, and communications. The organization has become a responsive and valued partner for Church leaders across the country.

With the rise of the latest twin crises of abuse and leadership failures in 2018, Leadership Roundtable responded with the expertise of our network and the strength of our resources to assist even more Church leaders to help them transform the Church’s management and leadership culture. The following timeline shows highlights of our response to the crises in 2018 and early 2019:

**NOVEMBER**

- Presented practical ideas to address the crises for bishops and diocesan teams on the West Coast who attended our Bishops’ Workshop at the Santa Clara Faith Formation Conference.

**FEBRUARY**

- Convened the Catholic Partnership Summit with more than 200 Catholic leaders from 43 dioceses to lift up recommendations to address the crises. Participants included abuse survivors, three cardinals, multiple bishops, diocesan staff, college and university presidents, corporate leaders and theologians, canon lawyers and philanthropists, religious superiors and experts in abuse prevention. Read more on the following pages.

**MARCH**

- Presented practical ideas to address stewardship in times of crises for bishops and diocesan teams on the East Coast who attended our Bishops’ Workshop at the Mid-Atlantic Congress.

- Published Heal the Body of Christ report with practical ideas from the Catholic Partnership Summit on how Church leaders, lay and ordained, can implement recovery and reform.

The work continues
Catholic leaders from across the country came together to address the twin crises of abuse and leadership failures. The attendees hailed from 43 dioceses and included bishops and abuse survivors, diocesan staff and college presidents, corporate leaders and theologians, canon lawyers and philanthropists, religious superiors and experts in abuse prevention.

Over two days of panels and roundtable discussions, participants identified top recommendations for how Catholic leaders could help the Church recover and reform. Leadership Roundtable shared the results with U.S. representatives attending the Vatican meeting on abuse in February. The recommendations were then published in a report, *Heal the Body of Christ*, that was published and distributed widely among Catholics across the United States through our website, social media, and media interviews. Additionally, a copy was sent to every bishop in advance of the United States Conference of Catholic Bishops’ June 2019 meeting.
“This is a watershed moment in which we have to look at how we exercise leadership in the life of the Church and authority in the life of the Church.”

-CARDINAL BLASE CUPICH, ARCHDIOCESE OF CHICAGO
Summit Speakers included:

- Abuse Survivors
- Abuse Prevention Experts
- Bishops
- Canon Lawyers
- Catholic University Leaders
- Philanthropists...and more.
More than 200 Catholic leaders gathered at the Summit to share ideas to address the crisis and create a new culture of leadership and management.

“The question is how is [power] applied...how do we apply the checks and balances that are best practices in the corporate world; how can they be applied also to how we live as a Church and how we function as a Church?”

–FATHER HANS ZOLLNER, S.J., PRESIDENT, CENTRE FOR CHILD PROTECTION OF THE PONTIFICAL GREGORIAN UNIVERSITY, ROME

“I would encourage bishops to implement best practices, to go beyond the Charter within your own dioceses. Do what you know needs to be done that you feel will make a difference.... Just begin now.”

–FRANCESCO CESAREO, CHAIR OF THE NATIONAL REVIEW BOARD & PRESIDENT OF ASSUMPTION COLLEGE

“This was the first time I have participated in a Leadership Roundtable event of this kind, and I am confident that such conferences are having a significant impact on the development, not only of episcopal and lay collaboration, but of the Catholic Church in the U.S. as a whole.”

–SEMINARY RECTOR
Recommendations from the Catholic Partnership Summit include:

- Commit to a preferential option for abuse victims/survivors and families, make it a priority to meet with survivors; keep survivors, families, and affected parishioners at all levels of decision-making
- Make the bishop selection process more transparent, utilizing a genuine discernment process that includes laity and clergy and takes into consideration the potential bishop’s experience in dealing with abuse; Identify best practices for bishops to listen to and engage parishioners that makes bishops accessible and responsive to needs
- Coordinate a national release of names to prevent ongoing trauma that happens each time more names are released
- Implement a Code of Conduct for bishops and ensure the Charter for the Protection of Children and Young People includes bishops; consider a national working group of clergy and lay experts to help write these
- Commit to and invest in creating a new culture of leadership and management that is accountable, transparent, and proactive in including lay leadership and co-responsibility
- Revise the Plan for Priestly Formation and seminary curriculum to address the root causes of clericalism by equipping priests with skills in shared leadership, transparency, and accountability

To read the report and the full list of recommendations, visit leadershiproundtable.org/crisis
Catholic leaders recognize that the Church is not only facing a crisis of abuse, but also a crisis of leadership failures. In order to resolve the abuse crisis, the Church must address the root causes of the crisis within the culture.

Leadership Roundtable helps Church leaders create a new culture of leadership with the Mission Management Model. This system-wide approach implements best practices in diocesan and parish systems to ensure the long-term health of the Church’s mission. Imagine every priest, religious, and lay leader in your parish or diocese knowing how to facilitate meetings, hire the right people, communicate effectively, sustain effective pastoral and finance councils, and more.

When Catholic leaders—lay, religious, and ordained—get the leadership and management skills to succeed, the parish flourishes. Plus, when leaders across a diocese are equipped with these skills, it can transform the entire faith community. The Mission Management Model’s six stages provide an assessment and customized plan that draws upon Leadership Roundtable’s suite of services and other resources to help a diocese reach its goals. Together, Leadership Roundtable and the diocese transform the management and leadership culture. In turn, the diocese is better able to serve the people of God.
Here is a sample of dioceses utilizing the Mission Management Model to transform their management and leadership culture:

**DIOCESE OF JEFFERSON CITY, MO**

Bishop Shawn McKnight had spent his first year as a bishop participating in listening sessions throughout his diocese, hearing the concerns of Catholics and getting to know the people of the rural Missouri communities. When the crises came to national focus in the summer of 2018, he quickly responded with a comprehensive plan in his diocese.

He and his staff created a new diocesan policy for bishop accountability, transparently shared all financial data related to abuse cases, and committed to clergy-lay collaboration in order to address clericalism. Bishop McKnight invited Leadership Roundtable to address his clergy convocation in the heat of the crises and introduced our Catholic Leadership 360 service to his diocesan leaders, as well as participating himself. He also began implementation of the Mission Management Model in order to create a new culture of leadership, one that is rooted in the co-responsibility of lay and clergy leaders in the diocese.
**DIOCESE OF ALTOONA-JOHNSTOWN, PA**

Bishop Mark Bartchak stepped into a diocese that had been devastated by abuse, financial struggles, and a declining population; all of which affect morale and effective pastoral ministry. He often travels across the vast reaches of the diocese: eight counties in the rural center of Pennsylvania. He regularly visits parishes, schools, and other local ministries to greet the people and to share in their joys and sufferings. He knows that if the Church is to sustain a vibrant presence for the people of the region, the diocese must directly address its challenges.

In 2018, he called together a meeting of lay and ordained Catholics from every county to begin a conversation and gather ideas for how to move the diocese forward. Leadership Roundtable was honored to facilitate the gathering and work with the Catholics in the diocese to imagine a new way of operating based on best practices. Bishop Bartchak has committed to implementing the Mission Management Model to restore trust and to develop a plan to help the diocese move forward with a sustainable future.

**ARCHDIOCESE OF NEWARK, NJ**

The Archdiocese of Newark has been a “ground zero” in the latest crises. Cardinal Joseph Tobin and diocesan leaders who were already working with Leadership Roundtable turned to us for solutions not only to address the immediate response, but to help build a long-term plan utilizing the Mission Management Model.

The Archdiocese created “Forward in Faith Together,” a comprehensive plan to implement a new culture of leadership in the archdiocese. Elements of the plan include creating new training and reporting programs, providing transparency of operations and finances, and investing in ongoing training and development.
“I am extremely grateful...because it helped me to focus on two robust priorities and to build resources and trainings under those priorities. It was a game changer.”

—SUSIE VETERS, D.MIN., DIRECTOR OF STEWARDSHIP AND PARISH SERVICES
What happens when an experienced pastor is reassigned to another parish and his skills in strategic planning or financial management go with him? **SUSIE VETERS** was determined to find a way to help Catholic parishes ensure that best practices are embedded in parish systems so that when a pastor leaves, the best practices stay and a parish continues to thrive.

Susie began serving as Director of Stewardship and Parish Services at the Catholic Community Foundation for the Archdiocese of New Orleans about two years ago. Trained as an accountant and holding a doctorate in ministry, she found that parishes didn’t always follow best practices for parish administration and leadership development.

“Because of my work as a CPA, one of the things I encountered was a lack of training and best practices,” Susie noted. “Our parishes often did things in ways that were inaccurate and inefficient.”

She wanted to find a way to support parishes, “particularly our priests and pastors to prepare them for what their duties would be and give them the knowledge to determine whether administrative tasks are being done correctly.”

**Archdiocesan leaders set vision**

Susie contacted Leadership Roundtable and spoke with Jim Lundholm-Eades, Director of Services and Programs. Together, they planned a day in the archdiocese during which Jim would speak with Susie and her fellow colleagues from various departments. She wanted to help the archdiocese develop a plan that would support parishes across the vast reaches of its territory, from the coastal marshland to the northern border with Mississippi.

**We wanted something that “could lead to systemic change and not just band-aids,” said Susie.**

“Jim led a discussion on the theology of pastoral administration and gave us a new language to discuss our challenges and envision an improved future state. He presented essential best practices and initiatives we could implement to really make a difference. This was particularly helpful to our group since many of us were new in our positions.”

“What he said to us has really set the stage for how we developed our long range plan, goals, priorities, and offerings,” Susie remarked. “The goal under the type of work I do came down to two things that Jim said we needed to focus on: pastoral administration and leadership formation. And if you look at our website now, that is what you’ll see. Those are the two categories of what we offer now.”

“I am extremely grateful for his visit as I jumped into my new position because it helped me to focus on two robust priorities and to build resources and trainings under those priorities. It was a game changer.”

**Pastoral leaders get training**

Now, pastoral leaders in the archdiocese have more training opportunities and resources in pastoral administration and leadership formation and can share best practices with staff and parish leadership teams. Through our offerings, **parish leaders discover how to be good stewards of donor resources, lead meetings, manage staff, and more.** They also have an opportunity to learn about their leadership strengths and improve their abilities to lead others.

Susie appreciates Leadership Roundtable’s focus on supporting systemic change across a diocese, rather than providing isolated programs. “Because of the nature of the Catholic Church, pastors get moved,” she noted. You may have a pastor with superb administration skills, but when he is reassigned, the best practices move with him.

Instead, Susie and her colleagues are setting up systems in the archdiocese so that all pastoral leaders will be trained and can embed best practices in the parishes where they work. These days, if a pastor moves to another parish, it’s often just fine. He moves on to a new assignment, but the best practices stay and benefit parishioners both now and far into the future.
Diocesan Office Assessment
This assessment compares the functioning of a diocesan office with the highest-functioning comparable offices in the country, in terms of structure, use of resources (people, finances, and facilities), and organizational culture. The process has two phases: interviews of diocesan office staff during a site visit and two simple surveys of leading pastors and all diocesan staff prior to the site visit. Based on outcomes, customized recommendations are offered for moving forward.

Catholic Standards for Excellence
Catholic Standards for Excellence is a set of 69 best Church management practices to support Catholic dioceses, parishes, and organizations. These Standards form the foundation of Leadership Roundtable’s suite of services and offer the Church consistent benchmarks for its managerial excellence. Leadership Roundtable offers a two-day seminar in which facilitators gain an array of tools, training materials, resources, and techniques to implement the Standards in their diverse communities. Dioceses, parishes, religious communities, and ministry organizations run according to the Standards can work towards a Seal of Excellence accreditation.

Roadmapping
Leadership Roundtable designed a comprehensive planning process called “Roadmapping” in response to Church leaders’ reports that they and their congregations were “tired of seeing our plans go nowhere.” The process involves identifying an objective, dividing it into manageable segments, organizing priorities, establishing action steps in a coherent sequence, and assigning accountability measures and timelines for moving forward. The roadmapping process is an integral part of the Mission Management Model.

Toolbox for Pastoral Management
Leadership Roundtable partners with dioceses, educational institutions, and religious communities to offer a weeklong intensive formational experience for seminarians, clergy, and lay ecclesial ministers on the topic of management of parishes and other pastoral organizations. The curriculum, based on research into the experiences of veteran pastoral leaders, is taught by practitioners who know not only their content area (finance, human resources, management, planning, etc.), but also the dynamics of the Catholic Church.

Catholic Leadership 360
This custom assessment, developed specifically for lay and ordained leaders in the Catholic Church, offers unique opportunities for growth in leadership, using respectful, structured feedback from those with whom pastoral leaders interact regularly. Participants identify a wide range of people in their communities who can assess their leadership from a 360-degree perspective. Each participant receives a report of the assessment results, engages in a confidential feedback session with a facilitator, and creates an individual development plan to grow in leadership.

Leadership Consulting
Leadership Roundtable provides consulting services in the areas of management and leadership to individual Church leaders or leadership teams. Consultation can be subject-specific, related to a specific leadership role, or arranged on an ongoing basis as part of a broader organizational development initiative. Characterized by a faithful appreciation of the Catholic Church, a focus on implementation, and deep professional experience, it includes ongoing development of managerial competencies, and often involves coaching senior leaders through specific situations.
“I highly recommend Catholic Leadership 360. While the time commitment is not extensive, the impact and payoff are significant.... The feedback I received is about more than just leadership, it also touched my deepest mission of my ministry.... There's a lot of grace that comes from this process.”

–BISHOP TIMOTHY DOHERTY, DIOCESE OF LAFAYETTE IN INDIANA

Coaching
Leadership Roundtable Coaching is modeled on the best executive coaching techniques and created specifically for Catholic leaders. It is a natural next step for those who have completed the Catholic Leadership 360 program or for those who want to deepen their leadership development. Individuals or groups are paired with an experienced coach who offers accountability, support, guidance, and resources.

ESTEEM: Engaging Students to Enliven the Ecclesial Mission
A joint project of Leadership Roundtable and the Saint Thomas More Chapel and Center at Yale University, ESTEEM is a year-long program on college and university campuses that develops the capacity of students to take leadership roles in their parishes and other Catholic institutions after graduation.
Leadership Roundtable was honored to inaugurate the J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal at the Catholic Partnership Summit in February 2019. The Medal seeks to inspire a culture of giving that promotes excellence in Church management and leadership. The award was bestowed upon three outstanding philanthropist couples. "Each of the three exceptional couples has made philanthropy to the Catholic Church a priority in their lives. They are living testimony to their commitment to the Church and its future," notes Fr. J. Bryan Hehir of the Selection Committee. "They provide a model for the next generation of Catholic philanthropists."
PETER AND CAROLYN† LYNCH  ARCHDIOCESE OF BOSTON

Peter and Carolyn Lynch believe that philanthropy should be an integral part of both faith and family life. Together, they founded The Lynch Foundation in 1988 in order to continue to spread the values that were instilled in them throughout their childhood. The foundation provides assistance to programs primarily in Massachusetts with an emphasis on education; culture and historic preservation; healthcare and wellness; and religious and educational efforts of the Roman Catholic Church. Peter managed the Magellan Fund at Fidelity and, for the last 28 years, has served as Chairman and principal fundraiser of the Inner-City Scholarship Fund. He has also served on the Archdiocesan finance committee for over 30 years. Though Carolyn was called to eternal life in 2015, her spirit is very much alive in the Lynch family’s ongoing commitment to education and social justice. Peter and Carolyn raised three daughters Mary, Annie, and Elizabeth and have eight grandchildren.

JIM AND MOLLY PERRY  ARCHDIOCESE OF CHICAGO

Jim and Molly Perry are a devoted couple who have long been committed to supporting Catholic causes. They focus their philanthropic efforts on supporting Catholic education, Catholic charities assisting the poor and vulnerable, and promoting Catholic culture, evangelization, and the perspective of the Catholic intellectual tradition in the public square. Jim is co-founder of Madison Dearborn Partners, a private equity firm based in Chicago, and sits on several corporate boards. Both he and Molly also serve on multiple boards in support of Catholic causes. Jim was a founding member of the School Board of the Archdiocese of Chicago in 2008 and later served as chair of Empower Illinois, a scholarship-granting organization designed to implement and promote a tuition tax credit policy. Between 2012 and 2017, Jim and Molly co-chaired To Teach Who Christ Is, the Archdiocese’s capital campaign for education.

JOHN AND DOROTHY SHEA  ARCHDIOCESE OF LOS ANGELES

John and Dorothy Shea have a passion for Catholic education, believing that a Catholic school education is a proven way to reverse the cycle of poverty that has affected many urban children for generations. Their charitable investments in Catholic schools, including tuition for students and support for training teachers and principals, have been returned many times over in the students whose lives have been irrevocably changed because they were given an opportunity to learn in a Catholic school. The Sheas are often heard to say that when you educate urban children in a Catholic school, you are also educating their families and their communities. John worked for various construction companies before permanently joining the company that his grandfather founded. Today, he is Chairman of J.F. Shea Co. Dorothy Babbitt Shea is actively involved in causes related to education and has served on multiple boards. John and Dorothy have raised eight children and have 31 grandchildren.
We were first introduced to the work of Leadership Roundtable through our Parish Finance Council's work with the Standards for Excellence program, which established guidelines and best practices for the council. We are inspired by the work of the Leadership Roundtable. We appreciate the efforts of committed lay Catholics to integrate finance, human resources and general management best practices in the Church with the overarching goal of amplifying the reach and impact of its ministry and mission.”

–DAVID AND ALICE MOUNT
Leadership Roundtable is grateful to our Partners in Mission

Foundations & Organizations
Bertelsen Family Fund
The Boisi Family Foundation
Catholic Extension
Catholic Community Foundation of Minnesota
Catholic Health Association
Cushman Foundation
Diocese of San Jose
Diocese of Savannah
Elizabeth & Frank Ingrassia Foundation
Guy and Kitty de Chazel Family Foundation
The Healey Family Foundation
Lilly Endowment Inc.
Mary J. Donnelly Foundation
Penates Foundation
Pontifical College Josephinum
Porticus North America Foundation
The Lynch Foundation
The Perry Family Foundation
Triad Foundation

Individuals
Anonymous (2)
John Banovetz
Father Richard Bay
Robert L. Berner
Donald F. Boehm
Geoffrey T. Boisi
Hans Brenninkmeyer
Michael and Stephanie Brough
Juanita Cain
Kevin K. Carton
Dee and Kevin J. Conway

Joseph Creedon
Barbara Anne Cusack
Carl and Theresa DeBarbrie
John Deitchman
Daniel J. Denihan
Elizabeth A. Donnelly
Lt. Gen. (Ret.) James M. Dubik and Sharon Basso
Josephine Everly
Christina M. Ferguson
Eugenio M. Fernandez
Joseph F. Finn
Zenobia V. Fox
Rick G. Francis
Robert C. Gasser
Anne M. Gavin
Charles Geschke
Bryan Grane
William C. Graustein
Archbishop Wilton D. Gregory
Bishop Gregory J. Hartmayer
Alice B. Hayes
Thomas J. Healey
Margaret M. Healy
Brian J. Hughes
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Father Kevin C. Kennedy
Mary Kessler
Susan R. King
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David Kushner
R. W. Lechase
Dennis and Pam Lucey
Lawson Magruder
Monica Mattioli

Elizabeth McCaul
Patrick A. McClain
Richard C. McGinnis
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Mary J. Moran
Joan F. Neal
Elio Pascutti
Father Anthony Pogorelc
Father Stephen Rapposelli
Sister Theresa Rickard
Father Michael G. Roach
Kerry A. Robinson and Michael Capello
Ann and Peter Robinson
Joseph E. Rothbauer
Father David F. Ryan
R. Gregory Sachs
Kimberley A. Smolik
Father David Songy
Dominic and Leona Tarantino
Julie Vanscoy
Father John J. Wall
Donald and Susan Watters
Monsignor William L. Young

Tributes
Patrick McClain
In Memory of Jeanne McClain

Elizabeth Donnelly
In Memory of Rev. Robert L. Beloin

Rev. Anthony Pogorelc
In Memory of Rev. Robert L. Beloin

Carl and Theresa DeBarbrie
In Honor of Most Reverend John C. Wester

The above foundations, organizations, and individuals made generous gifts between January 1, 2018 and December 31, 2018.
If we neglected to accurately recognize your generosity, please accept our apologies and notify us so that we may correct our records.
140 pastoral leaders completed the Toolbox for Pastoral Management, an intensive training in leadership and management skills for parishes.

“Provided me with information and tools to better myself and my commitment to the community.”
–CATHOLIC LEADERSHIP 360 PARTICIPANT

Thanks to your partnership with Leadership Roundtable in 2018

84% of Catholic Leadership 360 participants positively agree that they have changed how they interact with staff and parishioners.

“The Toolbox provided resources and best practices to develop into a more effective leader, steward, and facilitator. This has helped me provide more well-rounded leadership support to the pastor and parish.”
–LAY MINISTER PARTICIPANT IN THE TOOLBOX FOR PASTORAL MANAGEMENT
Inspiring ✔
Eye-Opening ✔
Superb ✔

– PARTICIPANT RESPONSES TO THE TOOLBOX FOR PASTORAL MANAGEMENT

163 pastoral leaders participated in Catholic Leadership 360, a tool for leadership assessment and growth

DISTRIBUTED
5,000 copies of Heal the Body of Christ, including to all bishops in the United States

SHARED SOLUTIONS TO THE CRISIS VIA
47 media articles, podcasts, radio shows, television spots, etc.
Board and Staff

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  Co-Chair and Treasurer of the Board

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  Program Manager, Standards for Excellence

- **Nicole Sotelo**  
  Communications and Marketing Manager

- **Ana Larmour**  
  Development and Finance Coordinator

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- **Megan Colford**  
  ESTEEM National Coordinator

- **Rev. Paul Holmes**  
  Advisor, Clergy Leadership Formation

- **Dominic Perri**  
  Consultant

- **Deacon Patrick Stokely**  
  Consultant

*The lists on this page reflect the status as of December 31, 2018.*
Spotlight on New Board Members

**KATHLEEN MCCHESNEY, PH.D.**  
Principal, Kinsale Consulting

Dr. Kathleen McChesney is an expert in ethical conduct in organizations and the investigation of crimes against children and vulnerable adults. Her firm, Kinsale Consulting, serves a variety of non-profit and for-profit organizations including Catholic dioceses and religious communities. She has held a number of leadership positions throughout her career, including as an Executive Assistant Director with the Federal Bureau of Investigation. Dr. McChesney implemented the first Office for Child and Youth Protection at the United States Conference of Catholic Bishops following the bishops’ adoption of the Charter for the Protection of Children and Young People. She is co-editor of *Sexual Abuse in the Catholic Church: A Decade of Crisis* and co-author of *Pick Up Your Own Brass: Leadership the FBI Way.* Dr. McChesney served as a founding board member of Leadership Roundtable from 2005-2012 and is grateful to return to the board at this important time in the life of the Church. She holds a B.S. in Police Science and Administration from Washington State University, an M.A. in Public Service from Seattle University, and a Ph.D. in Public Administration from Golden Gate University.

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**KENDRA DAVENPORT**  
Chief Development Officer, Operation Smile

Kendra Davenport possess nearly thirty consecutive years of development, communications, and marketing experience. She specializes in serving national and international NGOs whose missions encompass sustainable development, health and prevention, environmental protection, and health interventions and services. She currently serves as Chief Development Officer for Operation Smile, a non-profit medical service organization that provides cleft lip and palate surgery to children in more than 60 countries around the world. A mother of three grown daughters, Ms. Davenport has been married to Captain Aaron Davenport, USCG (ret.), for 28 years.

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**BRIAN REYNOLDS**  
Chancellor and Chief Administrative Officer, Archdiocese of Louisville

Brian Reynolds has served as a diocesan administrator, consultant, trainer, and author in Church ministry for almost 40 years. Over that time, he has worked with more than 100 Catholic dioceses in the United States, Canada, and Ireland. Additionally, he has served on the adjunct faculty of several colleges and universities and is author or co-author of five books and more than 40 articles on Church ministry, adolescence, and religious education. He currently serves as Chancellor and Chief Administrative Officer for the Archdiocese of Louisville. He holds a B.A. degree in Religious Studies from Fairfield University, a Master’s Degree in Religious Education from Fordham University, and an Ed.D. in Leadership Education from Spalding University. He has been married to his wife, Catherine, for 38 years and they have two young adult children.
## Financials

### Public support and revenue

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### Revenue

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</tr>
<tr>
<td>Publication Sales</td>
<td>$ 7,952</td>
<td>$ 0</td>
</tr>
<tr>
<td>Investment Revenue</td>
<td>$ 398</td>
<td>$ 0</td>
</tr>
<tr>
<td>Total revenue</td>
<td>$ 783,413</td>
<td>$ 0</td>
</tr>
<tr>
<td>Total public support and revenue</td>
<td>$ 1,769,321</td>
<td>$ 1,775,786</td>
</tr>
</tbody>
</table>

### Expenses

<table>
<thead>
<tr>
<th>Program services</th>
<th>Fiscal Year 2018</th>
<th>Fiscal Year 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Without Donor Restrictions</td>
<td>With Donor Restrictions</td>
</tr>
<tr>
<td>Program Partner Grants</td>
<td>$ 50,000</td>
<td>$ 0</td>
</tr>
<tr>
<td>Program Services</td>
<td>$ 1,388,683</td>
<td>$ 0</td>
</tr>
<tr>
<td>Total program services</td>
<td>$ 1,438,683</td>
<td>$ 0</td>
</tr>
<tr>
<td>Supporting services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management &amp; General</td>
<td>$ 302,857</td>
<td>$ 0</td>
</tr>
<tr>
<td>Fund-Raising Expenses</td>
<td>$ 289,015</td>
<td>$ 0</td>
</tr>
<tr>
<td>Total supporting services</td>
<td>$ 591,872</td>
<td>$ 0</td>
</tr>
<tr>
<td>Total expenses</td>
<td>$ 2,030,555</td>
<td>$ 0</td>
</tr>
</tbody>
</table>

### Net assets

<table>
<thead>
<tr>
<th></th>
<th>Fiscal Year 2018</th>
<th>Fiscal Year 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Without Donor Restrictions</td>
<td>With Donor Restrictions</td>
</tr>
<tr>
<td>Change in net assets</td>
<td>$ (261,234)</td>
<td>$ 1,775,786</td>
</tr>
<tr>
<td>Net assets at beginning of year</td>
<td>$ 444,760</td>
<td>$ 382,836</td>
</tr>
<tr>
<td>Net assets at end of year</td>
<td>$ 183,526</td>
<td>$ 2,158,622</td>
</tr>
</tbody>
</table>

Leadership Roundtable has total assets of $2.342 million that consist of:

- Unrestricted Assets: $183,526
- Temporarily Restricted: $2,158,622
- Total Net Assets: $2,342,148

Unrestricted net assets are used to account for public support that is unrestricted in nature. Temporarily restricted net assets are used to account for contributions that have donor-imposed restrictions that have not been fulfilled either in or by purpose.

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.

### 2018 SOURCES OF SUPPORT

- Public Support: $2,753,344 (78%)
- Program Revenue: $791,763 (22%)

### 2018 USES OF SUPPORT

- Programs: $1,438,683 (71%)
- Management: $289,015 (14%)
- Fundraising: $302,857 (15%)
From Crisis To Co-Responsibility: Creating a New Culture of Leadership
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.