Trust, Stewardship, and Synodality for a Thriving Church

A report from the 2021 Catholic Partnership Summit
OUR MISSION

In partnership with lay, ordained, and religious leaders and organizations across all sectors of the Catholic community in the United States and Rome, Leadership Roundtable seeks to elevate and implement best practices in management and leadership to establish a culture of co-responsible, servant leadership for a healthy, thriving Church in the U.S.
We are excited to present you with our report on the discussions and recommendations developed during the 2021 Catholic Partnership Summit. The Catholic Partnership Summit brings together Catholic leaders every year to address the most pressing challenges and opportunities facing the Church.

The 2021 Catholic Partnership Summit was unique, compared to years past, in numerous and positive ways. We met the challenges of convening during an ongoing pandemic and welcomed the opportunities presented by meeting together just as the global Church prepared to embark on a synodal path of dialogue, discernment, and consultation. Leaders from across the United States, Rome, and seven other countries came together virtually, along with a small group of leaders who gathered personally in Rome, and joined virtually to parts of the Summit.

A palpable sense of hope, determination, and commitment to the mission of the Church accompanied those who attended the Summit. Leaders affirmed the unique opportunities the Church has for charting a bold future as we continue to build a culture of accountability, transparency, and co-responsibility in the Church. Our discussions centered on moving forward from the pandemic, looking deeply at how our Church stewards its many resources, and how we can embrace the potential that lies ahead.

A call to the Synodal journey was on the top of everyone’s mind, particularly as leaders recognized the urgent need for the Church to listen to all voices, especially those on the periphery, and continually welcome diverse individuals to leadership roles.

Pope Francis has asked all Catholics to come to the table to listen and discern with one another. We hope this report serves as a foundation for the important discussions during the Synodal process and for the entire body of Christ as we collectively forge a path forward as a Church. We invite you to join our Church in discerning its path forward by reading and reflecting upon the recommendations contained herein, sharing them broadly, and implementing them in your communities and organizations.

We hope you enjoy reading the report!

Dear Friend,

Elizabeth McCaul
Co-chair of the Board

Geno Fernandez
Co-chair of the Board
The 2021 Catholic Partnership Summit sought to build upon recent conversations surrounding the financial crisis within the Church and the COVID-19 pandemic. We also sought to build upon the recommendations from these conversations, as well as our 2020 Catholic Partnership Summit. During our time together we followed the guiding principles for establishing recommendations set forth below.

Guiding Principles

All recommendations put forth during the 2021 Catholic Partnership Summit were defined to:

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 lay, religious, and clergy members of the Catholic faith working together for the mission of the Church
5. Lean forward into new possibilities
6. Be realistic and able to be translated into practical strategy and implementation.

Key Concepts

The following concepts capture the heart of the dialogue at the Catholic Partnership Summit. There was a recognition that:

- Our Catholic community will be healthier and stronger when more women, people of color, and young adults are co-responsible with clergy in the leadership of the Church.
- The resources of the Church have greater potential to transform peoples' lives when they are managed by people who are formed in the best practices of fiscal stewardship.
- The Synod is an opportunity to listen and better understand the perspectives of people who are not currently participating in the life of the Church.
- The quality of lay and clergy leadership in the Church is dependent upon the physical, emotional, and spiritual well-being of parish and diocesan leaders.
- The pandemic presented an opportunity to develop new methods of evangelization, catechesis, and collaboration using social media and technology.
- Formation in leadership and other fiscal management skills should be provided and required for all clergy, parish personnel, and members of parish and diocesan advisory councils.
- Transparency, accountability, and fraud prevention measures are essential for good governance of the Church and to establish public trust.
- It is important for budgets, hiring practices, and asset management to reflect the mission, values and priorities of the Church.
- The Synod will be a great success if it initiates a culture of lay inclusiveness in setting priorities for the Church through the discernment of the Holy Spirit.
- With deep divisions in the Church, we need forums or structures for people of differing ecclesial perspectives to engage in dialogue.
- Because the synodal process is new to most Roman Catholics, dioceses and parishes would benefit from education on its purpose, training on how to conduct synod consultations, and communication structures for processing input.
- We have to learn what it means to truly listen to one another.
EXECUTIVE SUMMARY of the 2021 Catholic Partnership Summit

Building upon the last two Catholic Partnership Summits, Leadership Roundtable convened the 2021 Catholic Partnership Summit, Building a Church for the Future: Mission, Stewardship, and Restoring Trust in a Post-Pandemic World, just as the Church prepared to embark on a synodal path of dialogue, discernment and consultation.

More than 270 leaders from 74 dioceses across the United States, Guam, Kenya, Canada, the Bahamas, Colombia, and Rome participated in the Summit, which reflected the Church’s rich diversity. University presidents, bishops, philanthropists, chief financial officers, women religious, cardinals, and other lay leaders came together for presentations, prayer, and small group discussions. Reflecting this global spirit of synodality, we were excited to welcome our partners in Rome to the Summit. Leaders from across Vatican dicasteries, congregations and councils gathered at the International Center on Missionary Animation (CIAM).

As the pandemic continued to challenge dioceses, parishes and families in unprecedented ways, the Summit highlighted a renewed sense of hope, determination and commitment to the mission of the Church. Collectively, leaders affirmed the unique opportunities for healing wounds, re-imaging what is possible, and charting a bold future as we continue to build a culture of accountability, transparency and co-responsibility in the Church. Participants also grappled with how this era has underscored the urgency to address systems and institutions that for too long have particularly marginalized women, people of color, and others on the periphery.

This executive summary contains major themes that emerged from Summit speakers and small group discussions.

Healing and Strengthening Our Catholic Community

1. Promote Inclusion and Lay Leadership
   There is a particular need in the Church to listen to the voices of women, people of color, LGBTQI Catholics, young adults, people with disabilities, and others who often have been excluded from leadership and decision-making. Actively recruiting individuals from historically underrepresented groups to leadership positions and creating structures for lay involvement in parish operations, ministries, and outreach are crucial to healing and strengthening our Church. Additionally, taking steps to professionalize ministerial roles and, where possible, providing paid positions helps ensure the Church recruits and trains those with skills to serve.

2. Prioritize Wellness
   Many clergy and laity experienced loneliness and isolation during the pandemic. It is vital to promote opportunities for connection and encounter. The Synod process is also a unique chance to bring people who have been excluded, marginalized or wounded by the Church back into the conversation and to listen to those who have left the Church about their decision to leave and identify actions to address the issues involved.

3. Leverage Technology for Evangelization
   During the pandemic, parishes and dioceses made technological and social media advances to reach people where they are. The Church can build upon those and push beyond its comfort zone to be more creative in evangelization and pastoral accompaniment.

4. Engage in Dialogue
   People desire to be heard. Synodality is not an abstraction, but rather offers a model for a listening Church and for ways to become more co-responsible. The Church has an opportunity to create forums and structures for people of differing ecclesial perspectives to engage in dialogue, as well as to identify and implement ways to build a greater sense of community and Christian journey. It starts by asking who is missing from the table and taking actions to ensure those individuals are at the table moving forward.

Stewardship of People

5. Advance Ongoing Clergy Formation
   All priests should engage in comprehensive, systematic and practical ongoing formation, available through The Basic Plan for the Ongoing Formation of Priests. Providing regular, ongoing leadership and management training to clergy equips them to pastor in a synodal Church that listens to those on the margins and leads co-responsibly with the laity. By reforming seminary curriculum to prioritize synodality, praxis, inclusion of women, and co-responsibility with laity, and by establishing standards and best practices as well as methods of review, the Church can ensure Catholic institutions are meeting these standards.

6. Prioritize Diversity
   A thriving Church actively welcomes individuals of all races, ethnicities, ages, genders, and sexual orientations to full participation in the life of the Church. Intentionally opening seats at the leadership table to include people of color, as well as young adults and women, and hiring, supporting and retaining diverse leaders is vital. Diversity must not merely be an ideal. The Church can create and implement accountability mechanisms to assess whether stated goals of inclusion and diverse leadership are being achieved.

7. Establish Formation Opportunities for Co-Responsibility
   For the laity, religious, and ordained leaders who serve the Church, ongoing training can help leaders better carry out their role in stewarding the Church co-responsibly. Building the capacity of those who serve on finance and parish councils by providing the tools necessary to effectively operate, including training, access to documents, regular discussions, engagement with the bishop, pastor, and staff will keep them responsive to the needs of the diocesan or parish community.

Stewardship of Financial Resources

8. Align Mission and Resources
   It is important to communicate openly how the parish or diocese is supporting the mission of the Church through financial stewardship. Analyzing the gap between the stated values and the allocation of resources and identifying steps to maximize consistency between values and use of resources will help ensure alignment with mission. The Church can also assign priests and pastors where their talents match the needs and culture of a parish and implement a standardized process for evaluating ordained and lay leaders that includes collecting feedback from the parish community and staff.

9. Establish Standards, Accountability, and Reporting Practices
   Transparency is a best practice of financial stewardship. Transparency can take many forms including: developing accurate position descriptions to ensure consistency between skills and the requirements of a position; publishing and making accessible annual financial statements; adopting a standardized process that includes as many people as possible in the discernment of goals and priorities; drafting budgets based on established goals and priorities to ensure those goals and the mission are funded; and requiring conflict of interest disclosure for all finance council members and anyone who has fiscal decision-making capacity.

10. Equip People for Fiscal Stewardship
    Fiscal stewardship demands hiring qualified and committed professionals for the management of parish and diocesan administrations. Offering ongoing training and competitive salaries and benefits will enable attracting and retaining highly-competent personnel for these roles. It is also important to empower finance councils to work co-responsibly with staff and clergy to examine all financial aspects and ensure compliance with ethical practices. Finance council members should be encouraged to take part in networking opportunities for council members as avenues to share best practices for fiscal management, transparency, and ethical practices.

Stewardship of Potential

11. Implement an Inclusive Synodal Process
    The 2021-23 Synod process offers a unique opportunity for all Catholics to share their ideas and perspectives and discern the will of God for the Church. To stimulate interest and broad participation, the Church should communicate the significance of the Synod process in establishing a culture inclusive of lay leaders in the Church. Leaders should consistently ask “Who are we missing?” from Synodal conversations and take intentional steps to include them in the process. Providing pastors with the tools and training to actively cast a wider net will help ensure diverse participation in the Synodal process while training leaders will ensure effective facilitation of consultations and reporting of results.

12. Partner boldly and broadly
    The Synod process offers a unique opportunity for the Church to establish permanent structures of co-responsibility that infuse synodality into the culture, policies, and practices of parishes and dioceses. Co-responsible structures build connections that encourage resource-sharing and collaboration on common themes raised during Synod consultations. Studying the inclusive governance of Eastern Rite Churches and other Churches to consider what practices can become a template for the Church, can also help ensure the Synod remains an ongoing process rather than a single event or program.

13. Approach stewardship with an abundance mindset
    There is great potential in the Church when its resources are aligned with its mission and our call to synodality. Rooting financial investments and management of assets in the principles of Catholic Social Teaching, including solidarity, equity, and dignity and utilizing creativity, urgency, and agility in stewardship enable the Church to engage in budgeting and use of resources with an abundance mindset.
In October 2021, the Catholic Church embarked on a global synodal journey, a two-year process of listening and discernment at all levels of the Church that aims to help transform the Church into a synodal body. In keeping with our mission to elevate and implement best leadership practices within the Church, Leadership Roundtable has stepped forward as a partner to the Church on this journey, offering our expertise and resources to ensure the success of the process.

“It is precisely this path of synodality which God expects of the Church of the third millennium,” said Pope Francis.1

A journey together
According to the Vatican, the Synodal journey is “both a gift and a task: by journeying together and reflecting together on the journey that has been made, the Church will be able to learn through [its] experience which processes can help [it] to live communion, to achieve participation, to open [itself] to mission. Our ‘journeying together’ is, in fact, what most effectively enacts and manifests the nature of the Church as the pilgrim and missionary People of God.”

In the one People of God, therefore, let us journey together, in order to experience a Church that receives and lives this gift of unity, and is open to the voice of the Spirit. The Synod has three key words: communion, participation and mission.”

—POPE FRANCIS, ADDRESS FOR THE OPENING OF THE SYNOD, OCT. 9, 2021


The word “synod” comes from the Greek “sunodos” meaning “a meeting; a common way.” For the Church, this Synodal journey is a common way taken together by all Catholics, a path to becoming a truly listening, co-responsible Church.

A New Culture
During the 2021 Catholic Partnership Summit, leaders discussed the future of the Church — the healing, strengthening, stewardship, and trust required to move forward from the crises of abuse, leadership failures, and financial mismanagement. Leaders made clear during the 2020 Catholic Partnership Summit that a new culture was needed for the Church to thrive. In 2021, they defined it: Synodality.

Synodality is at its core the opposite of clericalism. The former: a collaborative approach to decision-making that embraces listening and discernment co-responsibly between lay, religious, and ordained; the latter: a belief that the ordained are superior — the former: a co-responsible Church.

Synodality opens the door for feedback loops in parishes and dioceses and for creating processes of accountability that hold everyone accountable to one another. People have an authentic desire to be heard, and with “those forms of exercising authority on which the different types of abuse (power, economic, conscience, sexual) are grafted.”

To change the Church’s culture, synodality requires humility and courage. Catholic leaders have begun to acknowledge that to truly listen to one another, the Church must not just embrace but must enact a culture of co-responsibility and collaboration.

A Listening Church
“It is impossible to think of a conversion of our activity as a Church that does not include the active participation of all the members of God’s People,” Pope Francis wrote in a Letter of His Holiness Pope Francis to the People of God in 2018. “Indeed, wherever we have tried to replace, or silence, or ignore, or reduce the People of God to small elites, we end up creating communities, projects, theological approaches, spiritualities and structures without roots, without memory, without faces, without bodies and ultimately, without lives.”

Synodality breaks down barriers to encounter and dialogue, co-responsibility and collaboration, that prevent the Church from hearing diverse voices. Those on the periphery can only be brought into our conversations if we create convening spaces where honest and often challenging dialogue can take place.

Pope Francis reminds us that synodality should not be an abstraction, but that Church leaders should seek creative, inspiring ways to make the themes of co-responsibility and synodality more tangible so they come alive in the hearts of Catholics and in our institutions.

The Synod is often referred to as a “synod on synodality” — a moniker that reflects the importance of the process being undertaken now to shape the future of the Church.

Leadership Roundtable is proud to be collaborating with the United States Conference of Catholic Bishops (USCCB) and the Vatican on this Synodal journey, offering our expertise and resources to ensure the success of the journey to which we have all been called.

It is impossible to think of a conversion of our activity as a Church that does not include the active participation of all the members of God’s People.

— POPE FRANCIS


2 Pope Francis, 2018. Address to the Synod Fathers at the Opening of the Synod on Young People, the Faith, and Vocational Discernment.

3 Synod of Bishops, Preparatory Document, 2.


8 Leadership Roundtable is an independent, nonprofit organization that seeks to support Catholic leaders in building a Synodal Church. Leadership Roundtable is proud to be collaborating with the United States Conference of Catholic Bishops (USCCB) and the Vatican on this Synodal journey, offering our expertise and resources to ensure the success of the journey to which we have all been called.
Pope Francis has urged the Church to act as a “field hospital” for those who are wounded. The stark divides in our country and Catholic community have left many alienated, angry, and in need of healing. In the wake of a violent insurrection at the U.S. Capitol, the enduring sin of systemic racism, and extreme inequality growing worse during the pandemic, we are called as Catholics to seek justice and greater unity.

Michael Brough, an Executive Partner at Leadership Roundtable, opened the 2021 Catholic Partnership Summit with a conversation about healing and strengthening our Catholic community with author and podcast host Gloria Purvis and Fr. Ron Rolheiser, OMI, a theologian and acclaimed writer. Brough framed his opening remarks by recalling the powerful image of Pope Francis delivering his “Urbi et Orbi” (to the city [of Rome] and to the world) blessing in March of 2020 in an empty St. Peter’s Square. 

“Pope Francis exhorted us to look to the common good, to rethink our priorities and what we value, and to commit to solidarity in our daily life,” Brough said. Since last summer, he noted, the police killing of George Floyd has sparked “a long overdue reckoning on racial justice in our country.” Brough also observed that on Inauguration Day, “a young Catholic woman, Amanda Gorman, reminded us with her poem, The Hill We Climb, that the last tumultuous year has taught us much if we are able to learn.” The Church, he said, is called to more deeply “listen to all voices, to lay and ordained voices, to women’s voices, to young adult voices, Black and Latino and Asian and Native American and immigrant voices. This is the listening we are called to do in our Church.”

Reflecting on the signs of the times, Gloria Purvis observed that “there is a disconnect with our Catholic understanding of freedom and the common good, and a secular view that the individual has no obligation before his or her own liberty.” This radical individualism and distorted conception of freedom, she lamented, at times has seeped into our Catholic community during the pandemic as some Catholics resisted wearing masks and protested the shutdown of churches.
The Church is called to more deeply listen to all voices, to lay and ordained voices, to women’s voices, to young adult voices, Black and Latino and Asian and Native American and immigrant voices. This is the listening we are called to do in our Church.

— MICHAEL BROUGH

“We had forgotten what it means to be Catholic,” Purvis said.

George Floyd’s murder by police underscored how “the sin of racism has limited our understanding of human dignity” and made clear that “we have a less than robust understanding when we say each and every person is made in the image of God,” explained Purvis, a Black woman who has openly confronted racism in the Church. Purvis also noted that Catholics too often make an idol of politics and ideologies.

“We let political office-holders and political parties be more of a guide for us than examining our Catholic teaching,” she said.

To heal wounds and move forward together as a Church, Purvis emphasized that “we need a wholesale conversation about what it means to be Catholic and to believe in the dignity of the human person.”

Fr. Rolheiser pointed to a cultural and political atmosphere rife with suspicion as a barrier to healing and renewal.

“We are a bitterly divided society and a bitterly divided Church,” he said. “I’m not sure this country has been as divided since the Civil War.”

He described how different theological and ecclesial visions among Church leaders often contribute to division, to separate factions within the Catholic community. While division has always been a reality in the Church and nation, Fr. Rolheiser noted that “we are becoming ever more strident and intolerant, and social media is feeding the worst on both sides.”

The Catholic community can play an important role in making “a generative response moving forward” and that begins, he thinks, with “naming the moment with courage and humility.” Rolheiser urged Catholics to seek out and “wash the feet” of those we disagree with as a way to heal wounds.

“We should take Jesus and his command to love those who hate us seriously,” he said. “The litmus test for being a Catholic is can you love someone who hates you?”

“We had forgotten what it means to be Catholic,” Purvis said.

“Let political office-holders and political parties be more of a guide for us than examining our Catholic teaching,” she said.

To heal wounds and move forward together as a Church, Purvis emphasized that “we need a wholesale conversation about what it means to be Catholic and to believe in the dignity of the human person.” She expressed hope that a “spirit of openness, transparency and trust” can help us navigate difficult conversations and painful topics.

Fr. Rolheiser pointed to a cultural and political atmosphere rife with suspicion as a barrier to healing and renewal.

RECOMMENDATIONS

Healing and Strengthening our Catholic Community in the United States

PROMOTE LAY LEADERSHIP

• Actively appoint to leadership positions, committees, and task forces, individuals from historically underrepresented groups, including women, young adults, and people of color
• Create structures and avenues for lay involvement in parish operations, ministries, and outreach
• Take steps to professionalize ministerial roles and, where possible, provide paid positions
• Recruit, train, and engage volunteers in the leadership of parishes
• Recruit and train lay leaders with the skills to serve on finance councils
• Engage lay leaders in the decision-making of the parish or diocese
• Facilitate conversations around proactively advancing women to higher levels of leadership in the Church in answer to their baptismal call.

PRIORITIZE WELLNESS

• Promote opportunities for connection and encounter to address the loneliness and isolation many clergy and laity experienced during the pandemic
• Utilize the Synod process as an opportunity to bring people who have been excluded, marginalized, or wounded by the Church back into the conversation.

LEVERAGE TECHNOLOGY FOR EVANGELIZATION

• Build upon the technological and social media advances parishes and dioceses have made during the pandemic to reach people where they are
• Push beyond comfort zones and “business as usual” approaches to be more creative in evangelization and pastoral accompaniment.

ENGAGE IN DIALOGUE

• Create forums and structures for people of differing ecclesial perspectives to engage in dialogue
• Listen to those who have left the Church about their decision to leave and identify actions to address the issues involved.
• Identify and implement ways to build a greater sense of community and Christian journey into the parish
• Ask who is missing from the table and take actions to ensure those individuals are at the table moving forward
• Convene parish and diocesan forums that bring Catholics across the political spectrum together in respectful dialogue and listening.
“People are the Church’s most important asset,” said Mar Muñoz-Visoso of the United States Conference of Catholic Bishops (USCCB). “It’s important for those seeking to be good stewards to have the knowledge and the good sense of who are the members of the local Church, and who is represented, who is unrecognized or untapped, or worst, unwelcome.”

Muñoz-Visoso, who serves as Executive Director of the Secretariat for Cultural Diversity in the Church at the USCCB, moderated an engaging discussion about stewardship of people and inclusive management with an expert panel that included Ellen Mady of the Diocese of Pittsburgh, Susan Pascoe, an Australian who serves on the methodology commission for the Vatican’s Synod of Bishops, and Gene McQuade, a retired corporate leader at Citibank.

Discerning and making decisions together, Muñoz-Visoso highlighted, reflects a style of synodality and “implies the need to examine inclusion and diversity in Church governance and leadership roles, and to act decisively.”

An Inclusive Church
Ellen Mady, chancellor for the Diocese of Pittsburgh, recommended thinking about why we care about diversity as a Church before implementing the specifics of a strategy or plan.

“The core value we need to center with inclusion, participation and diversity goes back to the dignity of the human person,” she said. “If we step back, people are the essence of the Church. Vatican II asked us to make this a priority. We don’t find a lot about stewardship of organizational structures in the Gospel, but we do find a lot about stewardship of people.”

In order to move beyond what Mady called a “country club mentality” that sorts people according to perceived status, the Church must remember that “the body of Christ is not whole when we are missing inclusion and diversity.” When we value inclusion, it is tangibly expressed in diverse leadership and in how budgets are prioritized. An “examination of conscience,” she said, at a personal, parish, and diocesan level is needed.

Mady also recommended seeing “the adjacent possible” — a mindset of looking two steps ahead for inclusion opportunities, even if an immediate solution doesn’t present itself. Moving toward greater diversity is always a work in progress and requires intentionality. “Anytime I come to a table I ask ‘who is not here?’” Mady said.

Stewardship in Practice
Susan Pascoe of the Vatican Synod of Bishops framed her remarks by highlighting lessons learned from The Light from the Southern Cross: Promoting Co-Responsible Governance in the Catholic Church in Australia, a report released in 2020 by the Australian Catholic Bishops Conference and Catholic Religious Australia.

The five-year effort, prompted by clergy sexual abuse and institutional failures, undertook what Pascoe called “a steep learning that led to a self examination and a movement toward a great hope for the future.”

The Australian report underscored the importance of collegiality, synodality, stewardship, and dialogue.

“It was a way of asserting what good practice looks like,” Pascoe remarked.

As a member of the Synod of Bishops’ methodology commission, Pascoe also shared how the Synod’s preparatory document emphasizes the principle of inclusion. The question of how to reach people who do not feel heard by the Church, she said, is critical to building a culture of discernment, dialogue, and co-responsibility.

“We are called to embody these values, behaviors...
and norms that should be part of our DNA,” Pascoe emphasized.

Gene McQuade, retired Citibank CEO, board chair of Catholic Charities in New York City and member of Leadership Roundtable’s board of directors, shared his experiences with making inclusion and diversity a priority in the corporate world and in Catholic organizations. He noted that corporations and the Church both have top-down, hierarchical structures that are also moving toward greater collaboration and co-responsibility.

“The management challenge is to embed diversity and inclusion into the culture,” McQuade said. “My experience is that it’s critical but very difficult to achieve this embedding, and it’s where leadership and accountability come in. We need to make it a priority and measure the results.” Without clear goals and accountability, he noted, diversity is something that is talked about but not achieved.

McQuade also spoke to the importance of inclusion and diversity on finance councils.

“Finance councils are a well-established concept in Church managerial structure, but in my opinion not fully utilized,” he said, stressing that finance councils should “reflect a fair representation of our diocesan body.”

McQuade added: “It often takes stepping outside of our comfort zones and taking some chances to get a fairer representation.” Finance councils play “an important canonical role,” he said, and should work in tandem with following best financial practices and benchmarks.

“It’s important for those seeking to be good stewards to have the knowledge and the good sense of who are the members of the local Church, and who is represented, who is unrecognized or untapped, or worst, unwelcome. – Mar Muñoz-Visoso

RECOMMENDATIONS

Stewardship of People

ADVANCE ONGOING CLERGY FORMATION

• Put into action The Basic Plan for the Ongoing Formation of Priests to ensure all priests engage in comprehensive, systematic and practical ongoing formation

• Reform seminary curriculum to prioritize themes of synodality, praxis, inclusion of women, and co-responsibility with laity

• Establish managerial and leadership standards and best practices as well as methods of review to ensure Catholic institutions are meeting these standards

• Provide regular ongoing leadership and management training to clergy

• Evaluate, and if necessary revise, priestly formation to ensure clergy are equipped to pastor in a synodal Church that listens to those on the margins and leads co-responsibly with the laity.

PRIORITIZE DIVERSITY

• Ensure inclusion in parishes and dioceses by hiring, supporting, and retaining diverse leaders

• Actively welcome individuals of all races, ethnicities, ages, genders, and sexual orientations to full participation in the life of the Church

• Intentionally open seats at the leadership table to include Hispanic/Latino, Asian/Pacific Islander, Indigenous, and Black Catholics, as well as young adults and women

• Create and implement accountability mechanisms to assess whether stated goals of inclusion and diverse leadership are being achieved

• Identify opportunities — such as the global Synod — to include non-Catholics and those disconnected from the Church and to listen to their perspectives.

ESTABLISH FORMATION OPPORTUNITIES FOR CO-RESPONSIBILITY

• Develop ongoing training for finance and pastoral councils to help members better carry out their role in stewarding the Church co-responsibly with bishops and pastors

• Build the capacity of those who serve on finance and parish councils by providing the tools necessary to effectively operate, including training, access to documents, regular discussions, engagement with the bishop, pastor, and staff

• Offer ongoing formation to finance council members to keep them responsive to the needs of the diocesan or parish community.
The need for competent stewardship of financial resources is more important than ever as parishes and dioceses navigate a post-pandemic reality. Moderator Patrick Markey, managing partner at Leadership Roundtable, began with a summary of how the 2020 Catholic Partnership Summit led Leadership Roundtable to convene financial leaders from across the country in developing the Coalition for Ethical Financial Management in the Church. Three priorities grew from this work:

- Strengthening diocesan financial councils with a special focus on finance chairs
- Determining, disseminating, and supporting best financial practices
- Creating an online platform to collect and publish financial benchmarks and performance indicators.

Not long after the 2020 Catholic Partnership Summit, “a new reality struck,” as Markey described it. “The pandemic, political and social unrest, the closure of churches, and the halting of operations led Church leaders to focus on financial sustainability and exposed financial practices that were outdated or vulnerable,” he said, and pointed to the vision of Pope Francis as a source of inspiration. “As Pope Francis continues to tell us throughout this crisis, we can emerge from it better or worse, we can recognize where we have fallen short and set a course for improvement, also in the area of financial management.”

A New Reality

Matthew Manion, Director of the Center for Church Management at Villanova University, noted that while the Church has made significant progress in fostering greater accountability and financial transparency, challenges remain that are exacerbated by the pandemic. He cited a 2006 study from his Center that found 85 percent of dioceses had a case of embezzlement in a 5-year span. There are now better financial controls and oversight in many dioceses, Manion said, but “the Covid pandemic has brought back this risk and there are tons of people in our churches who are experiencing economic pressure now and the stress of dealing with the pandemic.”

A study Manion directed with a colleague, conducted in the three months after pandemic lockdowns began in March of 2020, analyzed Covid’s impact on parish collections. On average, collections were down 7 percent across 177 parishes studied. One in five parishes faced significant declines of 50 percent or more. But 16 percent of parishes experienced an increase in collections. Manion noted that the difference in those successful parishes was not determined by size, location, or whether they had a parish school. Parishes that adjusted quickly, became creative, and demonstrated what Pope Francis would call a “missionary impulse,” he said, flourished.

“‘It’s an example of accountability where people voted with their dollars, whether consciously or not, and held leaders accountable in ways that I think is exciting to the mission of the Church,’” he said.

Transparency and Accountability

Manion cited the axiom “what gets measured, gets managed” in referencing a scorecard from Voice of the Faithful that evaluates financial transparency in dioceses. Over the past four years, the average score for transparency has improved for all dioceses, and five dioceses had a perfect score last year.

“Financial transparency leads to greater generosity from the People of God,” he said, citing research that shows people are more likely to give when they trust organizations are accountable and transparent.
Manion emphasized that while financial transparency is crucial, it’s also not sufficient.

“Many of our people don’t know how to read financial reports. There is a real need to take the next step from transparency if we want to promote co-responsibility and help make better connections between the numbers, and the dollars, and the mission of the Church, and our impact on the world,” he said.

Manion drew from the Gospels to emphasize his point: “Proper stewardship of our financial resources in ways that are accountable, transparent, and co-responsible are a lot like the good seed in the Parable of the Sower. When we do it right it produces fruit for the mission of the Church.”

Ministering through Financial Management

Elizabeth Jensen, Chief Financial Officer for the Diocese of Orange, provided a diocesan perspective on stewarding finances during these challenging times. When the pandemic began, a focus on cash-flow forecasting quickly became a priority. The diocese created a database for weekly parish collection figures. The bishop’s leadership team started meeting daily instead of monthly. She acknowledged there is often tension between pastoral ministry and the responsibility to ensure the diocese is on sound financial ground. Jensen sees this as a false divide.

“Financial management is a ministry,” Jensen said. “The ability to receive, grow and steward financial resources enables our clergy to help those in need, maintain our parishes and schools, and to focus on faith formation and evangelization.”

Hiring competent leaders with financial expertise is critical to creating a culture of accountability and transparency. But Jensen observed that in hiring for key positions or in contract agreements with vendors “relationships within the Church sometimes take priority over making good decisions.” Jensen cited this as one reason why financial councils should have conflict-of-interest statements.

Jim Perry, founder of the financial firm Madison Dearborn Partners and member of Leadership Roundtable’s board of directors, shared his experiences serving on the finance council in the Archdiocese of Chicago. Church finance leaders often “have to do unpopular but necessary things,” he said, in order to ensure the solvency, stability, and growth of their diocese.

“We have an Archbishop who is comfortable delegating responsibility to capable leaders,” Perry said. “Our financial council serves more than ever before as a sort of board of directors, not narrowly scoped to oversee financial management and reporting. The Cardinal reserves all decision rights, but his team knows to treat the council as it would a board in a for-profit situation. Members are encouraged to ask tough questions and take leadership on commitments that delve more deeply into all key diocesan functions.”

Perry sees value in the fact that finance council members are drawn not only from the field of finance, but also from the sectors of technology, change management, human resources, and marketing.

Perry describes Chicago, like many dioceses, as a “turnaround project.” After examining various trends in the archdiocese, the finance team determined that its solvency could be in jeopardy. Now after two years of planning, the archdiocese is halfway through a consolidation of parishes and a renewal program tied to an upcoming fundraising campaign.

The finance council is also “getting creative on partnering and politics,” Perry said. The archdiocese recently entered into an operating agreement with the Big Shoulders Fund, which gives the nonprofit organization more responsibility over Catholic schools in the city’s poorest urban areas. In addition, Cardinal Blase Cupich, Archbishop of Chicago, and other archdiocesan leaders continue to lobby for a tuition-tax credit program for low-income families. Perry said this year the archdiocese will receive about $20 million in funds from the tuition-tax credit program, a critical source of revenue that helps to keep students in the city’s Catholic schools.

For dioceses to fulfill their mission of evangelization they have to be trusted by the people they serve. Ethical stewardship of all the resources entrusted to a diocese is crucial for establishing a basis for trust. The presentations and table discussions during this Summit session, offered concrete ways for dioceses and parishes to earn the trust urgently needed to carry out their mission with vigor.
RECOMMENDATIONS

Stewardship of Financial Resources

ALIGN MISSION AND RESOURCES
- Conduct an analysis of the gap between the stated values and the allocation of resources in parishes and dioceses, and identify steps to maximize consistency between values and use of resources
- Manage the Church’s real estate to ensure its use consistently aligns with the mission of the Church
- Assign priests and pastors so that their talents are matched with the needs and culture of a parish
- Communicate openly how the parish or diocese is supporting the mission of the Church through financial stewardship
- Implement a process based on standardized criteria for successful pastoral leadership for evaluating ordained and lay parish leaders and collecting feedback from the parish community and staff.

ESTABLISH STANDARDS, ACCOUNTABILITY, AND REPORTING PRACTICES
- Develop accurate position descriptions for parish and diocesan staff and volunteers to maintain consistency between the individual’s skills and the requirements of their position
- Publish and make accessible annual financial statements
- Adopt a pastoral planning process to include as many people as possible in the discernment of parish or diocesan goals and priorities
- Draft budgets based on the established goals and priorities of the parish or diocese
- Base budget decisions on the mission and goals of the Church to ensure that priorities and goals are funded
- Require conflict of interest disclosure for all finance council members and anyone who has fiscal decision-making capacity in parishes and dioceses.

EQUIPPING PEOPLE FOR FISCAL STEWARDSHIP
- Hire qualified and committed professionals for the management of parish and diocesan administrations
- Offer ongoing training and competitive salaries and benefits to attract and retain highly-competent personnel
- Empower diocesan and parish finance councils to examine financial statements, accounting practices, real estate transactions, risk management, and human resource management to ensure compliance with ethical practices
- Promote networking opportunities for dioceses to share best practices for fiscal management, transparency, and ethical practices, and encourage all dioceses to participate.

Photo Credit Mathew Schwartz on Unsplash
A global institution with a presence in nearly every part of the world, the Catholic Church has spiritual, social, and financial resources that reflect abundant potential. How to effectively steward this vast potential was the theme of a panel discussion moderated by Louis Damani Jones, the Program and Mission Alignment Coordinator for Catholic Urban Programs, a social ministry of the Diocese of Belleville.

“Our challenge is to instill the whispering of the Spirit into our processes, budgets, and programs,” Jones said in opening the discussion. “How can we be people of conversion personally and institutionally?”

Sr. Nathalie Becquart, XMCJ, an undersecretary to the General Secretariat of the Synod of Bishops, reflected on how synodality is an integral part of stewarding the Church’s potential.

Our Call to Synodality

“Synodality is a way of being ‘Church’ according to the dynamic of listening together to the voice of the Holy Spirit,” Sr. Becquart said. “I want to spread the fire of synodality that I have received through my experiences, which is the joy of the Gospel and missionary zeal.”

The path of synodality is a fruit of the Second Vatican Council, especially the Council’s emphasis on the Church as the People of God. “The Synod is a call to an inclusive Church: young, old, priest, bishop, lay woman, layman. We are all called to journey together,” she said.

In order to put into practice the principles of mutual listening, discernment and collaboration, Sr. Becquart highlighted the importance of leaders embracing co-responsibility and inclusion. “The way to implement synodality is to call everyone to participate so we are truly a missionary Church,” she remarked. “We are called to be protagonists.”

A Roadmap of Possibility

Amy Rauenhorst Goldman, CEO of GHR Foundation, described Pope Francis’ vision for the Church as “a roadmap” that can inspire us to understand stewardship of potential more deeply.

“Pope Francis also gives us a reality check to see that while the challenges are vast, positive change is possible,” Goldman said. Stewarding potential, she noted, has to do with not only strengthening individuals, but expanding the effectiveness and capacity of structures and institutions.
She highlighted two GHR priorities from the foundation’s “Prepare the Future” portfolios as examples of stewarding potential and cultivating the resources of the Church’s vast network in service of the common good. The Laudato Si Movement, previously known as the Global Catholic Climate Movement, is “tapping the unparalleled depth and breadth of the Catholic Church globally to take climate action as individuals and leaders of organizations,” Goldman said. FaithInvest, an international nonprofit membership organization for religious groups and faith-based investors, fosters investing “rooted in solidarity, equity, and dignity.”

These efforts, she said, demonstrate “creativity, urgency, and agility,” as they draw on the capacity of millions of people and billions of dollars in resources to impact change at the local, national, and global level.

A Church that lives her teachings will be a Church that rebuilds her trust and becomes worthy of long-term sustainable generosity. This will be a transformational Church and a Church worthy of her mission.

— KELLI REAGAN

Goldman shared her optimism for the potential of capacity building in Church networks when it comes to interreligious cooperation, and racial and social transformation.

“Through the Synod we can hear the voices around the world across a range of issues,” she said. “I don’t think we quite understand the power that has.”

She urged Church leaders to “shift our mindset from scarcity to abundance” as we put Catholic Social Teaching into practice on urgent moral challenges such as climate change. “This is a moment to reimagine what is possible. Let’s partner boldly across the Church and with local communities to realize this prophetic future.”

Framing Potential through Catholic Social Teaching

Kelli Reagan, Research Associate in the Center for Social Concerns at the University of Notre Dame, spoke about Catholic Social Teaching as a framework for understanding stewardship.

“In the Catholic social traditions, we encounter the moral potential of the Church to inform, inspire and change lives,” Reagan said. “Stewarding the potential of the Church means stewarding a moral imagination based on such abiding principles as the dignity of the human person and the preferential option for the poor.”

Catholic Social Teaching is not meant to be the “Church’s best kept secret,” but put into practice in direct ways.

“Our financial decisions say something about our values, beliefs and faith commitments,” Reagan emphasized. “Our budgets are where the rubber hits the road.”

But incorporating Catholic teaching into leadership decisions is often a challenge, Reagan noted. In her research interviews with chief financial officers from Catholic institutions, she found that “decision-makers expect little from Catholic Social Teaching when it comes to financial stewardship.” While Catholic teaching is sometimes viewed as too “idealistic,” she invited Summit participants to rediscover its power.

“A Church that lives her teachings will be a Church that rebuilds her trust and becomes worthy of long-term sustainable generosity,” Reagan said. “This will be a transformational Church and a Church worthy of her mission.”

RECOMMENDATIONS

Stewardship of Potential

IMPLEMENT AN INCLUSIVE SYNODAL PROCESS

• Stimulate interest and broad participation in the global Synod journey, communicating the unique opportunity for lay Catholics to share their ideas and perspectives through parish meetings and other formats
• Communicate the significance of the ongoing Synod process to help establish a culture of inclusion in how the Church discerns the prompting of the Holy Spirit
• Ask “Who are we missing?” from Synodal conversations and take intentional steps to include them in the process
• Provide pastors with tools and training to actively cast a wider net to ensure diverse participation in the Synodal process
• Train leaders to effectively facilitate engaging Synod consultations and to faithfully report on results.

PARTNER BOLDLY AND BROADLY

• Establish structures of co-responsibility to infuse synodality into the culture, policies, and practices of parishes and dioceses
• Study the inclusive governance of Eastern Rite Churches and other Roman Rite Churches to consider what practices can become a template for the Church
• Ensure the Synod remains an ongoing process rather than a single program
• Develop connections among dioceses, parishes, and Catholic leaders that encourage resource-sharing and collaboration on common themes raised during the Synod.

APPROACH STEWARDSHIP WITH AN ABUNDANCE MINDSET

• Root financial investments and management of assets in the principles of Catholic Social Teaching, including solidarity, equity, and dignity
• Utilize creativity, urgency, and agility in stewardship
• Approach parish and diocesan budgeting and use of resources with an abundance mindset.
Overlooking Saint Peter’s Square with the iconic Saint Peter’s Basilica rising in the background, a group of leaders gathered in-person in Rome on September 28 and 29 as part of the 2021 Catholic Partnership Summit. The virtual format of the 2021 Partnership Summit afforded Leadership Roundtable a unique opportunity to involve even more leaders than in the past, particularly through an in-person gathering in Rome that connected to the main event online.

During the two-day Summit, 30 leaders joined the event from Rome, meeting at the Center for Missionary Animation (CIAM) at the Pontifical Urbaniana University. Those gathered were able to virtually attend the first and third sessions of the Summit, and participate in special receptions each evening.

Additionally, Sr. Nathalie Becquart, XMCJ, under-secretary to the General Secretariat of the Vatican Synod of Bishops gave a special presentation to those gathered in Rome about the 2021-2023 Synod and Pope Francis’ call to a synodal journey.

“The chance to gather in-person, at a stunning venue, and meet with leaders such as Sr. Nathalie was a deeply meaningful opportunity,” said Kerry Robinson, an executive partner at Leadership Roundtable. “It allowed for a prominent and diverse group of international leaders to strengthen relationships and imagine new ways of serving the Church in the Holy See and across the globe through the instrument of Leadership Roundtable.”

Robinson hosted the event together with Nicole Perone, national coordinator of ESTEEM (Engaging Students to Enliven the Ecclesial Mission). ESTEEM is a program of Leadership Roundtable in collaboration with Saint Thomas More Catholic Chapel and Center at Yale University.

Among those who attended included leaders from:
- Vatican dicasteries
- international Catholic charitable agencies
- religious orders
- the diplomatic corps.

Welcoming leaders in Rome to the Catholic Partnership Summit

A View from Rome

Summit participants in Rome
About the J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal

Leadership Roundtable was honored to present the J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal during the 2021 Catholic Partnership Summit. The Monan Medal seeks to inspire a culture of giving that promotes excellence in Church management and leadership. We look to recognize outstanding Catholic philanthropists who exemplify the legacy of the former president of Boston College, Fr. J. Donald Monan, SJ. Fr. Monan’s life was a living testimony to how best practices, implemented in collaboration between clergy and laity, can transform a Catholic institution to bring excellence to management and mission.

The J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal recipients are Catholic philanthropists 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 or 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

2021 Honorees

Kathleen McCarthy Kostlan
John “Jack” and Eileen Connors
Lewis S. Ranieri
Leadership Roundtable’s Next Steps

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. Expand the Coalition for Ethical Financial Management in the Church and support enacting its recommended actions
2. Support a culture of co-responsibility, transparency, and accountability
3. Expand representation in Church Leadership including:
   a. Growing the ESTEEM program for young adults
   b. Growing the Latino Pastoral Leaders Initiative
4. Welcome more women, young adults, and people of color to Leadership Roundtable’s staff and board
5. Aid the Synodal process globally and in the U.S.
6. Produce Spanish-language resources and services
7. Produce A Pastor’s Toolbox book for seminarians

LIST OF EXPERT CONTRIBUTORS

Sr. Nathalie Becquart, XMCJ
Under-Secretary to General Secretariat, Vatican Synod of Bishops

Geoffrey Boisi
Founder, Leadership Roundtable

Michael Brough
Executive Partner, Leadership Roundtable

John Carr
Co-Director, Initiative on Catholic Social Thought and Public Life at Georgetown University

Kim Daniels
Co-Director, Initiative on Catholic Social Thought and Public Life at Georgetown University

Cardinal Timothy Dolan
Archbishop of New York

Margi English
Executive Partner, Leadership Roundtable

Sr. Sharon Euart
President and CEO, Catholic Health Association

Geno Fernandez
Executive Director, Resource Center for Religious Institutes

Amy Rauenhorst Goldman
CEO and Chair, GHR Foundation

Archbishop José Gomez
President, United States Conference of Catholic Bishops and Archbishop of Los Angeles

Cardinal Wilton Gregory
Archbishop of Washington

Sr. Mary Haddad, RSM
President and CEO, Catholic Health Association

Rev. Dennis Holtschneider, CM
President, Association of Catholic Colleges and Universities

Elizabeth Jensen
Chief Financial Officer, Roman Catholic Diocese of Orange

Louis Damani Jones
Program and Mission Alignment Coordinator, Catholic Urban Programs

John Matthew Knowles
Executive Director, Diocesan Fiscal Management Conference

Gene McQuade
Retired CEO, Citibank

Ellen Mady
Chancellor, Diocese of Pittsburgh

Matthew Manion
Faculty Director, Center for Church Management, Villanova University

Patrick Markey
Managing Partner, Leadership Roundtable

Elizabeth McCaul
Co-Chair, Leadership Roundtable Board of Directors

Cardinal Séan O’Malley, OFM Cap
Archbishop of Boston

Susan Pascoe
Member, Commission on Methodology, Vatican Synod of Bishops

Nicole Perone
National Coordinator, ESTEEM (Engaging Students to Enliven the Ecclesial Mission)

Jim Perry
Founder, Madison Dearborn Partners

Archbishop Christophe Pierre
Apostolic Nuncio to the United States

Gloria Purvis
Host, The Gloria Purvis Podcast

Kelli Reagan
Research Associate, Catholic Social Teaching, Center for Social Concerns, University of Notre Dame

Kerry Robinson
Executive Partner, Leadership Roundtable

Rev. Ron Rolheiser, OMI
Author

Elisabeth Román
President, National Catholic Council for Hispanic Ministry

Kim Smolik
Executive Partner, Leadership Roundtable

Cardinal Joseph Tobin, CSSR
Archbishop of Newark
Grow the Latino Pastoral Leaders Initiative

The Latino Pastoral Leaders Initiative is a service of Leadership Roundtable, generously funded by Lilly Endowment Inc. and other donors. The initiative works to increase access to critical leadership development and pastoral management training, coaching, peer support, and mentorship for Hispanic/Latino Catholic pastoral leaders — lay, religious and clergy. The Latino Pastoral Leaders Initiative seeks to build better capacity for a new culture of leadership, as well as respond to the key priorities identified at the conclusion of the V National Encuentro for Hispanic Ministry, the promotion of best practices in Church management and the development of leadership formation among Hispanic/Latino leaders. Leadership Roundtable has completed two cohorts of the Latino Pastoral Leaders Initiative and has a third cohort in progress. Additional cohorts are planned for 2022.

Expand the ESTEEM Program

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 trains, encourages, and supports young adults at colleges and universities in 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. ESTEEM is currently serving students at 20 colleges and universities in the United States and the Bahamas, and is working to expand to additional campuses in 2022. 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. Learn more about ESTEEM by visiting: esteemlead.org.
Leadership Roundtable Next Steps

For a Synodal Church: Support the global Synod process

Leadership Roundtable is inspired by Pope Francis’ vision for the global Church and his call for all Catholics to engage in a synodal journey. As a mission in service to the Church, and in conversation with Archbishop José Gomez, president of the United States Conference of Catholic Bishops (USCCB), we sought ways to offer our resources and expertise in support of the Synod process in the United States and abroad. Drawing upon a long-standing working relationship with many Vatican dicasteries, including the Secretariat of the Synod of Bishops, we began working with the Vatican and the USCCB in 2021 to help dioceses implement the Synod process.

We leveraged our 16-year history and expertise convening Catholic leaders in the spirit of synodality, and since the Summit, have produced two documents that are being used throughout the United States and the world to assist in Synod consultations:

- A guide for Facilitating Synodal Consultations, available in English and Spanish
- A guide for Reporting Synodal Consultations, available in English and Spanish.

Additionally, we convened leaders from national Catholic organizations, movements, and institutions to engage them in the Synod process and are working to facilitate future gatherings of these leaders. We continue to be a collaborator with the bishops’ conference and will help it develop an online system for receiving Synod reports from the nearly 200 dioceses in the United States.

Visit leadershiproundtable.org to download these guides

Produce A Pastor’s Toolbox book for seminarians and Hispanic/Latino Leaders

The Toolbox for Pastoral Management is a comprehensive program that introduces the key elements of pastoral leadership and management to priests, seminarians, and lay pastoral leaders. A customized residential program, the Toolbox offers a formational and education process that attends fully to each participant as an individual and covers essential management topics critical to the pastoral role. Participants engage in a series of presentations that provide practical, ready-to-use tools for the busy pastoral leader. Prayer, the sacraments, and fellowship round out this initiative.

A Pastor’s Toolbox is the foundational text that accompanies this program. Leadership Roundtable currently has produced two versions of A Pastor’s Toolbox and is working to create a version of the book specifically for seminarians and a version specifically for Hispanic/Latino leaders that is written in Spanish.
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Andrea Blanco
Program Manager, Latino Pastoral Leaders Initiative

Kate Alexander
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Peter Denio
Program Manager

Joanne Ruddy
Convenings and Meetings Manager

Brittany Czekaj
Development Manager

Nicole Perone
National Coordinator, ESTEEM
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In partnership with lay, ordained, and religious leaders and organizations across all sectors of the Catholic community in the United States and Rome, Leadership Roundtable seeks to elevate and implement best practices in management and leadership to establish a culture of co-responsible, servant leadership for a healthy, thriving Church in the U.S.