

NATIONAL LEADERSHIP ROUNDTABLE
ON CHURCH MANAGEMENT

———— 2013 Annual Meeting ————

A CALL TO
COMMUNION:

*CO-RESPONSIBILITY FOR
THE GOOD OF THE CHURCH*

Santa Clara University | June 25-27, 2013
www.TheLeadershipRoundtable.org/AnnualMeeting

This publication is a collection of the wisdom,
insights, observations, and exchange of ideas from
participants at A Call to Communion: Co-Responsibility
for the Good of the Church.

In June 2013 the National Leadership Roundtable on Church Management convened leaders from the Church and secular fields at Santa Clara University in Santa Clara, California, to explore how lay people understand their ecclesial rights in responsibilities, what they can offer the Church, and how to create new solutions to temporal challenges.

Included in this book are excerpts from the panels and presentations, as well as selected questions, answers, and insights from a wide range of Annual Meeting participants.

You are encouraged to learn more and continue to conversation online.

Visit www.TheLeadershipRoundtable.org/2013AnnualMeeting

for on-demand video presentations of all speakers and panelists, an electronic copy of this publication, as well as supplemental materials including the micro-biographies of all participants, a detailed agenda, and other information pertinent to the meeting.

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH COPYRIGHT 2013
THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT. ALL RIGHTS RESERVED.

MICHAEL O'LOUGHLIN, EDITOR
KATHARINE MCKENNA, EDITORIAL ASSISTANT

FOR MORE INFORMATION, PLEASE EMAIL INFO@THELEADERSHIPROUNDTABLE.ORG
OR CALL (202) 223-8962.

THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

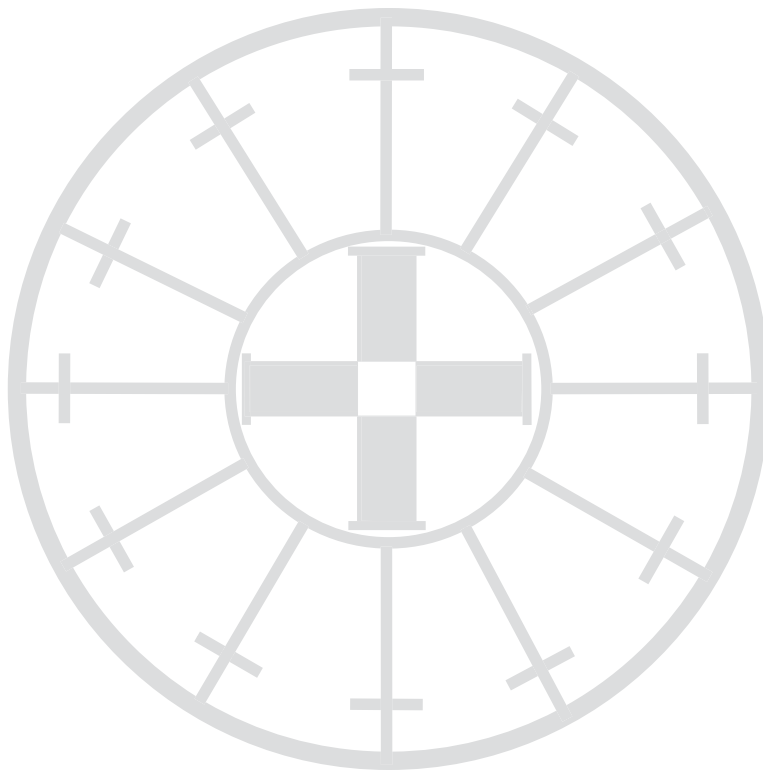
2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

Please note: Text highlighted in blue is hyperlinked.

TABLE OF CONTENTS

3	Opening Prayer and Chancellor's Welcome
5	Introduction to the Annual Meeting <i>Kerry Robinson</i>
6	Activities and Accomplishments of the Annual Meeting <i>Geoff Boisi, Chuck Geschke, Susan King, Kerry Robinson</i>
15	Everyone Leads: The New Evangelization and Getting Our Feet Dirty <i>Chris Lowney</i>
23	ESTEEM: Empowering Young People to Fulfill Their Baptismal Calling <i>Katie Diller, Rachel Hochstetler, John Kerrigan, Megan O'Neil, Pat Rice</i>
33	Co-Responsibility for Church Finances <i>Tom Healey, Patrick Markey, Brian Hughes, Mary Quilici Aumack</i>
41	2013 Leadership Roundtable Best Practices Awards <i>Honoring the Sobrato Family Foundation and CSJ Ministries</i>
45	Prayer on Day Two <i>Darla Romfo</i>
47	Pope Francis and Reforming the Vatican <i>Rev. Thomas Reese, SJ</i>
55	2013 Annual Meeting Concluding Remarks <i>Geoff Boisi, Jim Dubik, Kerry Robinson</i>
57	Appendix 1—2013 Annual Meeting Speaker, Panelist, and Presenter Biographies
61	Appendix 2—2013 Annual Meeting Participants
65	Appendix 3—Leadership Roundtable Council Biographies
70	Appendix 4—Leadership Roundtable Publications



THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

OPENING PRAYER AND CHANCELLOR'S WELCOME



Betsy Bliss

Trustee, The Leadership Roundtable

Holy Father, Holy Son, and Holy Spirit, our Creator, Redeemer, and Sustainer. Our hearts are burning within us this morning as we celebrate in great gratitude our coming together. You have brought us from many diverse backgrounds, from ordained and lay vocations, yet we are all united as committed Christians who love your Church and want to further her mission. Called and gifted with such a marvelous variety of talents, we humbly ask that you open each of our hearts to your Holy Spirit so that we may receive and perceive where the spirit is calling each of us.

Ignite our minds and imaginations; empower us to dream and create new solutions for the Church's temporal challenges. Charge us with enthusiasm, courage, and vigor to take active co-responsibility for the furthering of your kingdom. You call us into communion with you, with each other as individuals and as your people, and communion with your Church. With your grace help us to truly grasp that we are one body in our one Lord.

We ask this, as always, in the name of our Lord Jesus Christ. Amen.



Rev. William Rewak, SJ
Chancellor, Santa Clara University

I'm honored to be here to welcome you to Santa Clara University. Your organization is crucial to the efficient and sacred operation of our Church. It's become increasingly obvious that lay leadership is one of the growing graces of the Church, and the twenty-first century will see a full flowering of that grace. Just as Silicon Valley is the epicenter of the world of technology and innovation, I think your organization is the epicenter of Catholic lay leadership.

I remember Silicon Valley back in the 1940s when it was Santa Clara Valley, the Valley of Heart's Delight, with miles of fruit trees and sleepy villages. At first, Santa Clara University, which started in 1851, was a very small block of buildings, graduating about 200 students. This year, a few weeks ago, we graduated 3,500 students. Growth is a part of our lives.

This valley has transformed all of us. This university, which originally taught Latin, Greek, and history to the sons of local farmers and vintners, has blossomed into a full-fledged institution, that with its business, engineering, and law schools, and most importantly, its insistence on the ethical underpinning of all our disciplines, has been a partner in that transformation. We all grow and learn and then have an impact on our society. Pope Francis, a few days ago, said this, "What mission do the people of God have? To bring to the world the hope and salvation of God; to be a sign of the love of God who calls all to be friends of his; to be the yeast that ferments the dough, the salt that gives flavor and preserves from decay, the light that brightens."

May your light, your knowledge, your expertise, and your commitment brighten and bless our Church.

Kerry Robinson
Executive Director,
The Leadership Roundtable

INTRODUCTION TO THE ANNUAL MEETING



The Leadership Roundtable Annual Meeting provides an occasion to accomplish two objectives: to account for the activities and progress over the past year and to focus on a particular challenge facing the Church in the US with a view toward making a positive, concrete, and practical contribution toward a solution.

In past years, we have addressed our core areas of expertise, all of which are always in the temporal arena: management, finances, human resource development, and communications. We have taken up such important and diverse discussions as the long-term sustainability of Catholic school systems, safeguarding and strengthening Church assets during an uncertain economic period, including the global economic crisis, and restoring trust and credibility through managerial best practices in the wake of the sexual abuse crisis. We have had discussions on how best to equip new pastors with the financial and managerial tools they need to be successful pastors, on bolstering effective Church communications, and, of course, on the utilization of technology and social media. Always our aim is to strengthen the Church we love, to position it to be an even more effective instrument of evangelization and humanitarian beneficence.

This year, we respond to a challenge posed by Pope Benedict on the role of lay people in the Catholic Church. He called for a mature and committed laity that contributes to the apostolic aim of the Church in its entirety through an active co-responsibility with ordained leaders. True, meaningful,

and effective collaboration among laity, religious, and ordained leaders is the cornerstone of the National Leadership Roundtable on Church Management.

And what a marvelous year this has been for our Church, beginning with the courageous and humble resignation of Pope Benedict and culminating in the election of Pope Francis. I have a girlfriend who refers to this experience of being so proud to be Catholic right now as having “pope hope.” Your very presence here is an example of taking seriously the papal mandate of genuine co-responsibility for the Church. And from the bottom of my heart, I thank you for your dedication and your commitment.

Next month we will commence our ninth formal year of service to the Church, championing best managerial practices, helping to solve contemporary temporal challenges facing Church leaders, advocating for effective utilization of the gifts of all members of the faithful, especially the laity, and emulating the Church we envision. It has become our custom at the Annual Meeting to provide you an account of how we have cared for the financial and intellectual contributions of hundreds of our executive leaders who have shared so generously in support of our mission. It is important that we remain accountable to you, and that in addition to updating you on the progress of our work plan, the development of new key initiatives, and the success of our strategic collaborations, that we have the chance to benefit from your candid feedback and counsel.

THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

ACTIVITIES AND ACCOMPLISHMENTS OF THE ANNUAL MEETING

Kerry Robinson, *Executive Director, The Leadership Roundtable*

Susan King, *Dean, School of Journalism and Mass Communication, University of North Carolina*

Charles Geschke, *Co-Founder, Adobe Systems, Inc.*

Geoff Boisi, *Founding Chair, The Leadership Roundtable*

Kerry Robinson

A Year in Review

In January, our board approved a new three-year strategic plan laying out goals, objectives, and metrics across our range of activities. Our dual focus is to broaden and deepen the use of best practices in the Church and to broaden and deepen the engagement of senior-level Catholic leaders from the secular realm in the management practices of the Church. A major priority following this gathering will be to engage all of our members fully and recruit new members from across the country to be part of this movement of genuine effective service to the Church. You are all invited to recommend and nominate colleagues who you think would both contribute to this mission and find it to be a rewarding experience.

All our work is informed by a vision for a superbly managed Church using a dual

strategy of engagement with current senior Church and secular leaders along with future leaders. We work toward a regionalization plan that will be relevant in many different parts of the United States, with a strong commitment to personal and communal stewardship.

To help tell our story from the past year, we have three Leadership Roundtable trustees joining me on stage: Susan King, dean of the School of Journalism and Mass Communication at the University of North Carolina; Chuck Geschke, co-founder of Adobe Systems; and Geoff Boisi, founding chairman of the Leadership Roundtable.

Gratitude for Geoff Boisi

The Leadership Roundtable would not have been born without Geoff's leadership, passion, dedication, commitment, and integrity. Geoff is ending his second four-year term as chair,

emulating what he advocates and wholly in line with our Standards for Excellence. It's a best practice, especially for a founding chair, to pass the mantle to a worthy successor. In September we are going to properly honor and thank Geoff and the founding board members, but allow me just one personal note. For 8 years, Geoff has met with me by phone or in person every week for at least an hour. That is extraordinary dedication for a chair. And his counsel to me, his support of our team, of his fellow colleagues on the board, and his constant willingness to take on even the most seemingly insurmountable challenges facing Church leaders, with grace and tenacity, is a genuine blessing to the Church and world. Thank you, Geoff.



Susan King

Dean,
School of Journalism and
Mass Communication, University
of North Carolina

Utilizing the Leadership Roundtable Menu of Services



The Leadership Roundtable's signature resource, [Catholic Standards for Excellence](#), is now in use to some degree in 662 different Catholic parishes, dioceses, and nonprofits. The strategy going forward is a bit different. We're really looking for cultural change. It's accepting, understanding, and seeing what the Standards for Excellence in these various ideas will mean for change within the various institutions within the Church. We're trying to bring the idea of excellence across all areas of the Church. Our parish, diocesan, and Catholic nonprofit partners have found that the Standards can really be transformational in how they operate.

I want to make clear that the Standards

for Excellence are novel. They didn't exist before. If the laity or parish priests or leaders of nonprofits asked "How can we be at the top of our game? How can we make sure that excellence in our culture represents what we stand for?", there weren't solutions immediately at hand. But today, there is a solution.

The goal is, once you put together these best practices, you receive a Standards for Excellence seal of approval. There are a number of funders who are now looking to see if nonprofits and other groups they fund are committed to the best practices found in the Standards for Excellence, and that's a lever for them to see this as an organization that they can trust.

We're finding when one Leadership Roundtable resource is accepted into a diocese, parish, or Catholic nonprofit, that they will then turn to some of these others.

You want to have good management skills. How do you manage performance reviews?

There's the [Catholic Leadership 360](#). It's not just one person looking at you. It's an entire review of all the various people whose work you affect and impact. It can be transformational and it can also be hard. It changes the dynamics of an institution.



[ESTEEM](#), Engaging Students to Enliven the Ecclesial Mission, is working with young people at the university level. A diocese may say, We need to really activate our youth. They may start with ESTEEM and then see the value of other Leadership Roundtable resources. Essentially, what our staff has found is

that if they start with one of these various ideas or products, that Church leaders recognize there is a connectedness between the various programs.

If a bishop or parish priest or lay minister buys into the idea of operating with best practices, then he or she has bought into the movement and will likely go engage with us at a deeper level. We continuously introduce Leadership Roundtable programs and services as part of an integrated solution.

We engage locally. The Leadership Roundtable goes into a parish or diocese, engages in workshops to establish a presence, and creates a deep connection between the people involved in the change and the solutions that are needed.

This is a partnership and collaboration. It's a different strategy. We're practicing "gateway consulting" because we seek



to open up the opportunity for people to utilize our many resources.

One of those resources is the [Toolbox for Pastoral Management](#), a collaboration with our partners at Seton Hall University. Twice per year, newly appointed Catholic pastors from across the country spend a week engaging in executive leadership training with field experts. Participants say that it is fantastic to have a training session about all the things they weren't prepared for in seminary. Pastors may not master budget management when they finish, but they have new strategies to manage the myriad issues parishes face.

Of course, you can only train so many people in two workshops a year. It's not

going to instantly transform the Church. We're excited at the fact that there will now be a book published later this year, *A Pastor's Toolbox*. Liturgical Press is publishing this book so that pastors who may not get to the working session can also pick it up. It's another way to expand the repertoire.

I find it very exciting that nearly ten years after the Leadership Roundtable was launched, there are now solutions. It's no longer just an idea. There are many, many Catholic organizations that say, "We need to deal with our managerial issues and our problems with best practices." The sense of change has been accepted and progress has been made.

Charles Geschke

Co-Founder

Adobe Systems, Inc.

When my partner, John Wornack, and I started Adobe, people asked when they were hired, "What are our rules of behavior as a company?" John and I looked at one another, and we said, "We're not going to sit down and write a bunch of rules." "So what should we do?" they asked. I said, "Well, I think that

we ought to make it really simple." To be a successful business, it was pretty obvious to us that we had to deal with our customers, shareholders, business partners around the world, employees, and communities in which we operated, but coming up with a set of specific rules seemed like it was a waste of time. So we adopted a very simple principle. The Adobe way of dealing with all of those constituencies is, whenever you encounter someone, you treat them the way you would like to be treated. I suspect most of you are familiar with that principle.

Culture has become a very important ingredient in successfully building a business. It's interesting that the Church has tremendous amounts of doctrine and all sorts of principles to talk to us about, but its culture began to fall behind. It was time to bring those principles of what it means to create a great culture to the Church because the Church is a huge organization. I'm always fond of telling people, "I've got this great company I'd like you to consider investing in. It's got billions and billions of dollars and fabulous assets all around the world. It was one little problem: The CEO has several thousand direct reports, and he only sees them once every five years. Would you invest in that company?" And the answer, of course, is, "No."

There are a lot of things about the structure of the Church and the culture of how it operates where we think we can have a tremendous amount to offer just in terms of our experience. I'm sort of glad I was asked to talk about our efforts to support Catholic schools because I am a Catholic education alumnus starting from kindergarten all the way through university. Some of our children have been able to go through that same sequence.

Catholic schools played an important part of my ability to be successful in my career.

Strengthening Catholic Schools

Let me talk a little bit about what we're doing in the area of the Catholic schools. At the 2011 Annual Meeting we were asked by Church leaders to focus on the sustainability of the Catholic school system. It's been under tremendous economic pressure. We really need to think about, from a fundamental economic point of view, how to deal with the temporal issues associated with that set of school systems. I'm going to address 5 ways the Leadership Roundtable is strengthening Catholic schools.

The first is *system leadership training*, and there we're focused on three projects.

The first project is working in partnership with the University of Notre Dame on its Alliance for Catholic Education program. Our goal is to assist in the recruitment, the training, and the placement of the next generation of executive Catholic school leaders. The second activity is in the partnership with the National Catholic Education Association. We're going to provide training seminars for existing school system leaders beginning this fall as a way of helping educate that cadre of important leadership component in the schools. Finally, with the very generous support of the Lynch Foundation in Boston, we have a series of four seminars that are going to be offered to the board chairs of Catholic and charter high schools and their presidents in Boston this Fall.

Next, the Leadership Roundtable is involved in *school advocacy*. We're sponsoring two networking sessions for senior executives who are interested in school choice advocacy. The very first session is going to



Chuck Geschke

take place tomorrow morning as one of our working group sessions here. It's entitled, "Strategies and Tactics for Advancing Private School Choice in Blue States." The second advocacy program is going to be held this fall at our Regional Roundtable in Philadelphia.

The third area is in *multi-school governance*. Today, most of the Catholic schools are run as sort of individual silos, and they have relatively little networking going on in terms of cooperative leadership and management. We're in the process of drafting a guide for the choice of current options as well as some best practices in multi-school governance. That guide is going to be available this fall.

Fourth is *advisory services*. We're continuing to look for opportunities where we can provide strategic assistance to dioceses and school systems that will simultaneously further our goals of greater involvement of the laity but also provide a focus on implementing best practices. We're currently working with Cathedral High School in Boston to create several projects that will be replicable throughout the rest of the country. These projects include the development of a post-baccalaureate program for urban populations. We're also working with Philadelphia Catholic high schools to provide technical assistance as an independent group of lay leaders to help manage the temporal operations of their schools. These advisory services are focused on improving temporal excellence with the goal of increasing the college graduation rates of kids from lower socio-economic levels, so critical to the potential future success of those young people.

Finally, we'll devote our next *Regional Roundtable* in Philadelphia in September to Catholic schools. This regional gathering follows similar events both here

in California as well as in Chicago, and our relationship with the Philadelphia schools initiative is going to be highlighted.

Geoff Boisi

*Founding Chair,
The Leadership Roundtable*



Strategic Investing

My task today is to talk about two additional initiatives. The first one stems from our responsibility in working with the financial sustainability of the Church in the United States. In the midst of the financial crisis, some senior Church leaders asked if we would host a symposium about the financial crisis, the causes of it, the impact it would have on the Catholic Church, and any recommendations that we would have in terms of helping the bishops think through the issues. We put a blue ribbon panel of people together and it was a great day of conversation about financial issues dealing with the Church. One observation was that in order for the mission to be sustained, we needed to do something smarter, in a more sophisticated way, about the financial oversight of the Church's capital base. When we looked around, we observed that our Jewish, Mormon, Episcopalian, and Lutheran friends had all approached investing in a much more professional

way than we in the Catholic Church. Some of the larger institutions within the Church had put a sophisticated group of people together to invest their capital, but across the large swath of the Catholic community, we lacked that capability. The whole notion is that by pooling capital together in a sophisticated way, we can achieve better returns in the utilization of our capital. The capital that we do have will be generating a greater amount of income. We want to take a page out of the book of some of the other larger institutions that have been able



to bring together sophisticated money management capability to greater use of their particular mission.

Mid-Atlantic Congress

Baltimore's Archbishop William Lori called us about a year or so ago wanting to create something similar to what you have been doing here on the West Coast at the LA Religious Education Congress. We wanted to bring Catholic institutions from the East Coast together and put on a workshop for bishops. He asked the Leadership Roundtable to partner with them to do that, and that took place in Maryland earlier this year.

One of the most interesting parts of it was a daylong session that we had with the bishops. We had a dozen bishops and a number of other leaders from their diocese together with our board and some other experts, and we created focus groups on a variety of different issues that the bishops indicated to us that were most important and intriguing to them.

We think we've touched on something here that can be extremely helpful: to offer a peer-to-peer, confidential environment for the bishops to talk candidly about their positive and negative experiences that they have had in an environment with other executives who have had similar kinds of experiences.

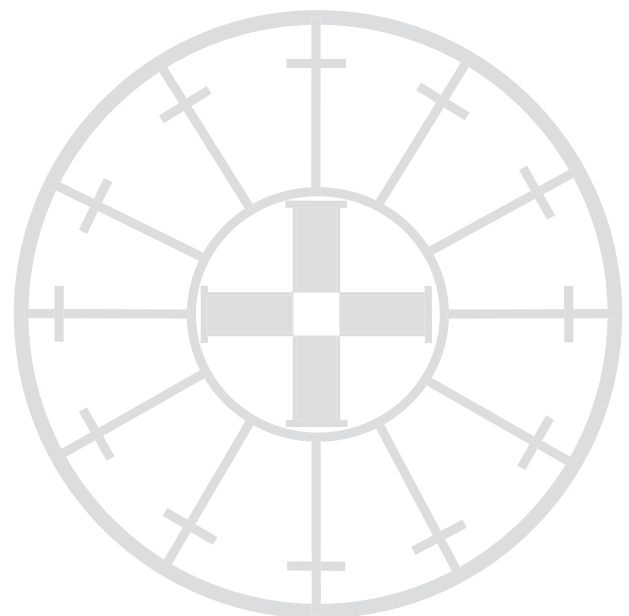
Kerry Robinson

Our fourth area of activity is the Catholic Philanthropic Partnership. We are identifying and engaging the nation's top 100 philanthropically engaged Catholic families across the US. They are contributing financially to support the work of the Leadership Roundtable, allowing us to continue to respond to the needs facing Church leaders. They're also coming together with our board as a strategic think tank on best managerial practice. We are prevailing upon their own expertise and perspective as philanthropists who have made investments in the Church over many decades to be part of this solution-oriented service to the Church. These always involve high-impact initiatives to solve temporal challenges facing the Church, and they are also providing us the necessary capital to expand.

Just in the last month, we had a wonderful, simultaneous outreach from three important Catholic philanthropic networks in the country. The Philanthropy Roundtable has expressed an interest in partnering with the Leadership Roundtable, particularly on schools and our action-oriented approach to helping sustain Catholic school systems. We will jointly sponsor a session on September 30th on our schools work for their members as well as our members. The Papal Foundation has expressed an interest in exploring a partnership with us as well, and then our very beloved

FADICA, Foundations and Donors Interested in Catholic Activities, helped create the Leadership Roundtable 10 years ago. Several of us serve on FADICA's board as well as the Leadership Roundtable's board. We are going to be working very closely with FADICA's new president, Alexia Kelley, to figure out ways that together these two networks can eliminate any duplication of effort and, more importantly, maximize the collective impact strategically.

This synchronicity and dynamism of bringing together serious Catholic philanthropic capital and serious intellectual action-oriented capital really helps create a lay force of consequence that the Church can benefit enormously from. It's incredibly complementary work. On the one hand, we will be maximizing the impact of the grant dollar so the philanthropist is happy. We are busy at work creating a culture of managerial excellence for the Church ensuring that Catholic entities are worthy of great generosity. Everyone benefits with this partnership.



SELECTED QUESTIONS, ANSWERS, AND COMMENTS



Fr. Nathan Castle

Rev. Nathan Castle, OP
*Director,
Catholic Community at Stanford University*

I've been in campus ministry 24 years, and many young people are trying to learn about their faith, and they're trying to do it online. A lot of the online Catholic resources offer what I think are very simple answers to complex questions. Nuanced conversation online is a little harder to pull off, and in this kind of politicized Church environment, it's hard to pull off a lot of places.

I'm interested in what are best practices now because we've started at our place a Center for Theological and Spiritual Formation where we're trying to bring in people to do that kind of education in real time, and then create a video. I'm kind of adrift as to how to put things online and in what formats. People will listen to

something at the gym. They'll listen to something on a road trip, but I'm not sure what best practices are in the Church with regard to the use of online educational resources.

CatholicPastor.org

Lt. Gen. (Ret.) James Dubik
*Chair-elect,
The Leadership Roundtable*



Jim Dubik

CatholicPastor.org is an online community of practice of priests and pastors in which they share best practices, ask each other questions, and support one another. We used a version of this in the US Army to accelerate learning at various levels because we found that the pace of learning in a war was much faster than our institution could produce.

We created this community of practice online where captains could ask questions, and give answers, and where problems

could be solved very quickly by sharing best practices. It's both synchronous and asynchronous. Sometimes they're live talking to one another, and sometimes information is posted that they can respond to in an asynchronous way. There are sometimes live meetings annually where people from the community of practice come together for fellowship.

Gary Macy
*Director, Graduate Program in Pastoral
Ministries,
Santa Clara University*

People in my program are going to be the lay leaders and 80-percent of the entire ministry in the Church is done by the laity, and women comprise 80-percent of that group. My issue is that right now that they are not well paid. It's very, very difficult for them to have a sustainable income in a particular parish or a diocese. I know you all know that this is a serious problem, but I think it may be one of the most serious problems.



Gary Macy

It would be helpful to have a non-profit organization that would pay a decent salary to lay ministers that would partner with, but be independent of the parishes and the diocese so that there would be a continuous guarantee of income to the parish lay minister beyond the role of a particular pastor or a particular bishop. That's one possible solution to the problem, and this is going to be an extremely serious issue as more and more laity do the ministerial work of the Church. They're going to need to be funded seriously. I have an interest in this. I would like to have my students know they're going to have a job when they get out that they're going to be able to live on.

Sally Vance-Trembath

*Professor of Theology,
Santa Clara University*



Sally Vance-Trembath

Do you have any gateways to the students at our Catholic universities who are in the business schools or M.Div programs? In my experience here at Santa Clara, they are deeply committed to a good Church in the future, and they're very committed to their majors. They're going to be us in the future. Are you

on the ground in the business schools, and especially in the MA and the M.Div programs doing this work?

Kerry Robinson

I have two responses. The first goes back to when the Leadership Roundtable was originally formed. We were adamant that we were not going to duplicate efforts in the Church, and so that put an onus on ourselves to scan the whole horizon of the Church in the US and identify those national Catholic networks whose own mission had a bearing on ours and reach out and strategically invite a partnership. One of those networks is the ACCU, Association of Catholic Colleges and Universities, and within that, particularly those Catholic universities that have business schools. And the advantage, of course, is that we can prevail upon that already-existing resource, intellectual and otherwise.

More specifically to your question, though, and what will be featured at lunch today, is a program called ESTEEM, Engaging Students to Enliven the Ecclesial Mission. This is a partnership. It's a national young adult leadership formation program in partnership with St. Thomas More Catholic Chapel & Center at Yale University and the Leadership Roundtable. It's on 12 campuses. The genius behind it is this recognition that as you have just given voice to: there are incredibly talented young adult Catholics studying at Catholic colleges and non-Catholic colleges. They have a great love for the Church, they're not jaded, they're serious about their faith, and they want to be leaders and an active participant in the Church that they envision. They may not be majoring in theology or religious studies. They may be majoring in accounting or history, but what happens

to them is they graduate from this positive experience of Church at the university level and we as a Church have said it's okay if they drift away while they're busy starting their careers and families. They'll come back when they get married, have a child, or experience a personal crisis, we used to say. And at the Leadership Roundtable, we said that this not a good strategic plan for the Church. We want to try to stem that chasm right from the beginning. That led to the creation of ESTEEM. It's a fantastic curriculum that has been developed that can be adapted at the local university level for all the participating universities, and it equips the best and brightest Catholics with a sense of ownership for the Church.

It exposes them to ecclesiology, canon law, and social justice teaching. It's kind of a crash course in how the Church operates. When they graduate, they are positioned to serve on a diocesan financial council, a parish pastoral council, the board of trustees of a Catholic social service provider, et cetera. We think that this is going to encourage this next best generation to stay actively engaged with the Church.

Arturo Chávez

*President,
Mexican-American Catholic College*

The challenges of the new evangelization have really called us to look at the intercultural competencies needed for a ministry in the Church. I think business is way ahead of Church. I'd be interested to hear what you might be able to draw from that for the Church. The new evangelization also resonates very much with us at the Hispanic ministry because our model of Church is a missionary Church. Not



Arturo Chávez

so much one that is focused on institutions and institutional processes, but it still needs accountability, the missionary model of Church. With those two things in mind, in terms of model of Church and intercultural competencies, I'd be interested to hear your comments.

Geoff Boisi

Coming from a business standpoint, I would agree with what you've said. I think business is way ahead of where the Church is in this regard, and it's a combination of identifying leaders who understand their historical culture, but also understanding the culture of the medium within which they are operating, and finding the right people to combine those.

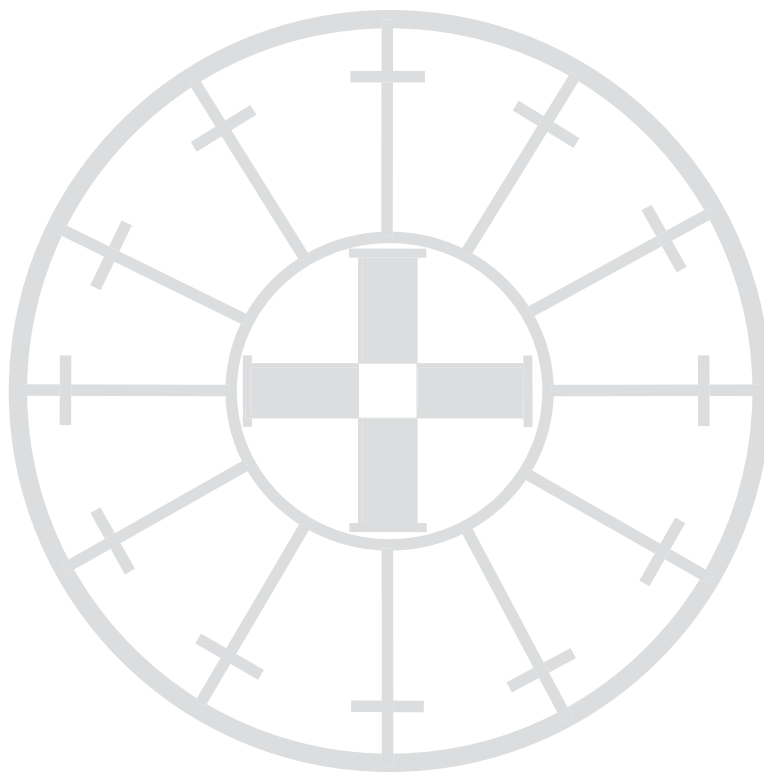
We do not have enough Latino leadership at the board level of this organization, and the council level of this organization. We have implored identification of people, both men and women of Latino backgrounds, who we can incorporate into leadership on this level.

The way that businesses traditionally have thought about these things is, how do you attack a market? Do you attack a market

geographically? Do you attack a market from a functional standpoint, or a product standpoint? Do you attack a market from a knowledge base, or an industry base? There are other communities that are communicating with each other in new and different ways. I think that we're still operating under a more traditional approach, and that's why some of the new communities are absolutely critical to the future of the Church. We have to get insight from you and representatives of those various communities in order to teach us how to think about how to better communicate. It's important to get thoughtful leaders involved with us so that we can use our convening power, and use our collective voice to express those things, and to learn and to adapt appropriately.

Chuck Geschke

I find at the parish level, a lot of the cultural issues I just described are actually going quite well. If you look at the leadership at our parish, our priest is a grandfather. Our pastor's wife unfortunately passed away too early in their life, and his grandkids have actually come to Church and listened to papa preach. Our religious administrator has been a woman for years. Our CFO is a woman. At the parish level, the Church is doing better, and I don't want that message to be lost.



THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

EVERYONE LEADS: THE NEW EVANGELIZATION AND GETTING OUR FEET DIRTY

Chris Lowney

Former Managing Director of JP Morgan & Co. and author of [Pope Francis: Why He Leads the Way He Leads](#)



I was invited to talk about leadership, co-responsibility for the good of the Church, and the one thing I know for sure is that, in fact, everybody here has more value to add on that question than I do. I'm going to think of myself as a kind of conversation starter, and hopefully spur a little imagination and discussion around that topic.

I would like to invite you to do something. Take about 10 or 15 quiet seconds and think of the names of one or two living people that we would consider leaders. And then take

a few more quiet seconds and wonder why you think of that name. Take a moment to think of the qualities or attributes that you associate with being a good leader.

Now, I invite you to chat for 30 seconds with people and share the names and ideas you have come up with. You don't have to agree about anything. It's just a little fun experiment. And then in the course of my time talking it will become clear why we went through this little game. Remember the content of that discussion. It's going to be relevant in a few minutes.

First, it's imperative for us as a Church to have a very broad, widely distributed notion of leadership. Secondly, that's something that we Catholics actually ought to be great at. Theologically and spiritually, there are a lot of resources, ideas, and foundations that we can draw on, but we aren't very good at it. A big mission can help people get the sort of culture of change they need to get to where they want to go. That's going to be the story that I'm going to go through today.

I want everybody to imagine the world today and the world about 15 or 20 years ago. If you think that the world today is faster-paced, raise your hand. If you think the world today is more complicated than the world about 15 or 20 years ago, raise your hand. If you think that in the course of running your life or running an organization you have to cope with more change and make more decisions, raise your hand. This is why we need to talk about leadership.

When I started working at JP Morgan in 1983, when we used the word leadership, what came to our minds was a person, or maybe three or four people. Lou Preston, in the corporate office of JP Morgan, was the leadership. And then in the course of the 80s and 90s we understood that it's absolutely inconceivable, the world is too massively scaled, too complex, too fast-changing, that any set of one, two, four, or five people is going to sit in a corner and make every important decision that has to be made, and represent us to every important constituency we have to reach. We started to think about

the word in a completely different way, not so much a person, but more like a behavior.

Every one of these issues, every one of these realities, affects our Catholic Church. As a human organization, we have the same human imperative, human issues. Unless we get better leadership behavior, there's no way in the world we cope. And in my mind, Pope Francis really is surfacing this same kind of idea in his own ways.

He's not using the word leadership. He's using the word co-responsibility, co-ownership, a very similar kind of concept. He talks about nurturing the spiritual and apostolic growth. In business terms, I'd say we have to undertake a massive cultural change here and we're not ready for it. And I want to talk a little bit about the whole idea of how we might understand leadership and how we might have good resources within our tradition to spur greater leadership. Who are leaders? People thought of great names during your little chat there. I wonder who thought of their own name. You probably didn't turn to the person next to you and say, "Me."

We're raised in a culture that teaches us to be modest people, or at least to pretend to be modest people. Especially as Christians, as Catholic Christians, humility is an incredibly important virtue. Not a week has gone by when Pope Francis doesn't talk about humility. And though humility is extremely important when it comes to the concept of leadership, I want to suggest that somehow it's misplaced because we carry around a broken stereotype of leadership. Namely, we associate it only with being chief executive, president, general, pope, bishop, or cardinal. Our default instinct when I say, think of the names of leaders, is, I suspect, to think of people who have some hierarchal authority, and that's a very important concept of leadership, but it's

not the only one. If we're going to pull off what we're being asked to do here, one of the things we need to do, not only for ourselves, but for everybody who's sitting in the community is get them to think of themselves as leaders first.

What do good leaders do to motivate people? That was the second part of that mental experiment. And I'm sure people came up with great ideas like decisiveness and honor and courage. General Erick Shinseki articulated this idea about a person with great leadership credentials: "You must love those you lead before you can be an effective leader." General Eric Shinseki, until a few years ago, was the highest-ranking military officer in the United States. And the first time I heard that idea it struck me as odd coming from a military class that we all typically associate with machismo. The more I thought about it, the more I suspect that generals, in fact, are making better choices if they love the people they must place into difficulty. I also bet that soldiers perform better if they believe they're valued in a very deep way by the people who have the terrible job of sending them out to face their death.

Who's a leader? Everybody is leading, well or poorly, all of the time. And our first claim to leadership is not our status, rather, what we do with whatever status we have. This is not the way we think, but it's not a gimmick either. If you look in a dictionary, you'll see different definitions of the word leadership. They would always include this one: "To point out a way, direction, or goal and to influence others toward it." And isn't it true that everybody here is doing those words all the time? We're pointing out a way by virtue of how we run our schools, our parishes, and our companies. We're having influence. A lot of people here are parents. Could there be any more obvious example of pointing a way and influencing others than what parents

would do for children in the course of a lifetime? It very interesting that in the course of the last hour, when Chuck Geschke was describing Adobe, and what they're trying to do, he talked about a way. He very explicitly referenced by implication the way of Jesus. People who have it in their minds, this is my first leadership opportunity, and responsibility to point out the way and have influence in whatever sphere of life I have.

We tend to think about leadership as a very secular concept, but in fact, this has come into the second idea I mentioned. We could find a very deep theological and spiritual basis or roots for thinking about how people lead. The first way we would all think about it might be a little paradoxical, you know, because I guess if we went around the room and we asked people to start to identify themselves as Christians, people would use the following words: "I'm a follower of Jesus." And our religious language uses words like "vocation" and "disciple" and the roots of those words have a following sense to them. If I call you; you come to me, you're following. But our religious language also uses words like apostle and mission. And the roots of those words have exactly the opposite connotation. Those words mean to send. If I send you, you're not following, you're out in front, and you're leading. We have both following and leading, in a theological sense, going on as good Christians.

The sixth chapter of Isaiah is a very beautiful meditation on how we might understand this vocation to lead.

In some ways it's like the prophets experience of call. Early in the chapter there's this: "whom shall go, whom shall we send, who will go for us?" And then Isaiah feels very unworthy. He says, "Woe is me. I'm a man of unclean lips," and then as the chapter goes along, he feels himself touched

by God's presence. Angels bring a charcoal from God's throne. Later in the chapter this call comes back, "Whom shall we send? Who will go for us?" And then he says, "Here I am, send me."

We have theological ways in which we should be good at leadership. This is in our language, and also in our own spirituality. We should be good at this because some of the ideas that we know from the secular business world are important for leading well. We could find a lot of those ideas in our own spirituality. I gave the quote from General Shinseki, and I'm sure we have in our spirituality the idea of "love one another as I have loved you." The story from the prophet Isaiah shares the idea that you don't kind of take it upon yourself to lead. There's a something authentic about it, it's not fake, and it's not something I made up. And if you go into any bookstore, you're going to see at least five things about authentic leadership nowadays. That is the idea of putting mission above self-interest.

In *Good to Great* we read about the characteristics of very high-performing companies led by "level-five" leaders. The first secret of consulting: use arcane terminology that's not self-evident. And then define it. The only thing "level-five" leaders means is people who put the mission above their own self-interests. Surely, this too would be very deep within our spirituality. The concept that at a certain moment I appreciate, "Okay, it's not my world. The world doesn't revolve around me. I'm here to serve God's plan for humanity." This is another very effective or very important leadership trait that happens to dovetail very nicely with Catholic spirituality.

And a last one that we might not intuitively recognize in our own tradition is the idea of change openness or freedom. There's a famous meditation in the Spiritual Exercises

where Saint Ignatius says, "Imagine you inherited an enormous amount of money, what are you to do with it?" And so we go, all right, Saint Ignatius, I'll give it to poor people and rejoice. And maybe that's the best thing we could do with excess money. But it's the wrong answer in the meditation. For any of you who've been exposed to Jesuit spirituality, you know what Ignatius says is, the first thing we need to do always is make ourselves free. We must pursue any legitimate course of action, never an illegitimate or immoral one. And only when we're free are we in a position to make a good choice. And then we choose whatever best serves our mission. This idea of freedom, change, openness is really interesting. It's coming up now almost every week.

Remember Woodrow Wilson said, "You want to make enemies, try to change something." To recap our story: When you have a lot of complexity and change, you need a widespread culture of leadership. We have a lot of really good resources within our tradition that should help us to be really good at it. And I think most would intuitively agree we're not great at a very distributed notion of leadership.

We all have our own ideas of why we aren't better. One aspect of our Church is, of course, hierarchical. We believe in a concept of a teaching authority. We have a lot of things that reinforce a stereotypical boss-only model of leadership, and we really haven't worked very hard at recovering some of these other notions that lend themselves to the kind of leadership we really need.

How could we get there?

We could change the culture, and get a much more distributed sense of leadership working by focusing on some urgent issues or projects. We can use these moments to strategically define or point out a way

in which everybody has some sort of leadership role. And so in the course of addressing the problem, we'll also get the culture change that we want. We're going to talk about this now in terms of our burning platform. I'm going to use one as a case study, the idea of a new evangelization. For further reference, you could turn to the *Lentamente*, the document that introduced the 2011 synod where the bishops went to Rome to talk about the new evangelization.

I did an unscientific survey of a handful of my friends who still go to Church. Most people had a vague sense about new evangelization at best. There was no urgency whatsoever. There was no idea that this is the top of the Church's agenda. Potentially we have a burning platform.

If we can get some sense of mission and then articulate a strategy, that might make people feel like they have an opportunity and a need to contribute. Some elements of strategy for this problem could include: be more welcoming, be more accountable to the people who come to us, by being more entrepreneurial in the way we approach them. Let's start with the idea of being more welcoming.

Let me confess that I have never invited anybody to come to Church. I've attended a lot of churches; nobody has ever asked me to invite somebody to come to Church. So in terms of a kind of a culture of welcome, we're pretty far behind the pack. We could easily imagine how being more welcoming is the sort of thing that would call on talents from the individual family on up to a diocese in the Church at large. Once you welcome people, you have to have some accountability for what their human experience and spiritual growth is like when they get there, and that's the sense in which I want to talk about accountability.

Here is a statistic from Pew Forum: those who have left the Catholic Church outnumber those who have joined, by four to one. We're not very welcoming and we have a lot going in the other direction. I want to point out the top three reasons given by Catholics who have left for Protestant traditions.

Top three: spiritual needs not being met at 71 percent, found a religion they like more at 70 percent, and just gradually drifted away at over 50 percent. I find these reasons both hopeful and frustrating because to me these are very controllable, or among the most controllable things. Dogmatic issues, I might not be able to offer change to suit you. But I can be accountable for what kind of human experience and what kind of spiritual growth you have when you come to us. The first step in doing something about this is actually understanding people's experiences. Some of you who are in the field know about the reveal survey, which Willow Church pioneered and is now being done in about 200 churches. They ask people, "What do you want most from Church?" And then they ask people every year to report on their spiritual growth or how well their experience at church lines up against these needs. This is a way to be responsible for the spiritual growth of Church members.

In the unfortunate case that people eventually decide to leave another logical piece of accountability would be to check on their welfare and see if they would be interested in returning. Let's look at a Hartford Seminary survey.

This survey measures the percentage of congregations who definitely contact lapsed attendees. Catholics are at the bottom. Only 23 percent of Catholic churches that are declining contact people

who have lapsed. Of Catholic churches that are growing, more than a third are contacting people who have left.

This brings us to our third point: to be much more entrepreneurial in how we approach people. The numbers of those who don't come in the first place or who leave include those who consider themselves spiritual, but not religious, they don't like the Church being involved in politics, they belong to large mega-churches, and a number of other reasons. There is no one-size-fits-all method of addressing a diverse array of people.

In terms of our strategy of inviting people to our Church, another aspect is that we're going to have to do some real narrow casting. In other words, be much more entrepreneurial into what community is this guy in, and how might I reach him, and what is this guy like, and how might we reach him.

I had the privilege to visit Quantico, where the top level Marine officer candidates are vetted. These guys are waking up in the middle of the night, and putting 100 pound backpacks on to march in the rain. At a certain moment I asked the colonel, "Obviously you're trying to weed out who is not tough enough and who is tough. What other skills are you trying to give these people?" His response, "You know, the only thing I'm trying to do, I'm trying to get these people comfortable with the reality of being uncomfortable." For me, this is where we are as a Church. It's very uncomfortable. I don't know anybody who's entirely happy and at ease with the human, cultural, technological, social environments in which we find ourselves. Our challenge is to accept the fact that it's uncomfortable and to keep operating and keep being creative and keep thinking and keep moving forward.

SELECTED QUESTIONS, ANSWERS, AND COMMENTS

Tom Healey

Treasurer, The Leadership Roundtable

Chris, can you relate this to the new Pope?

We're all discovering, and are very hopeful, of his new attitude. But on your themes of both welcoming and accountability, how does he fit and how do we learn from what he's trying to instruct us?

Chris Lowney

Let me tell you this anecdote about a Jesuit who was the rector of a seminary. At a certain point they asked him to start a new parish in that neighborhood. And he asked for volunteers to help him and, of course, they all did. He divided the whole thing in zones. Then he said, "Okay, go out and meet people; make sure you go to the poorest." Years later, when he was Cardinal in Buenos Aires, a study was done that said the real sphere of influence for a parish is about 600 meters in every direction from the building. Pope Francis said, "Our physical parishes are often larger than that. So why don't we set up little storefronts and get catechists to staff them and to receive those who might show up?" And one of the priests says to him, "But you know, if people start going to that place they might not come to the church." And the cardinal said, "Well, are they coming to Church now?"

This kind of concept is the idea that we have to get out into the game. You have to take some risks and try things: these quotes about being free. Now the real challenge for any leader in any organization is what can you change, what can you not change, and what should you change? In religious organizations, these questions are incredibly loaded because you believe your core values

were revealed, they're not negotiable. That always makes it incredibly difficult in terms of what can we change and not change.

Mary Cunningham Agee

President, The Nurturing Network



Mary Cunningham Agee

We don't invite somebody to something that we're not sure is going to be a positive experience for them. I think that's really the elephant in the room. There's a breach of trust that many of us have become quite private in our worship, and, if anything, we have grown distant. So the concept of welcoming was a great word because it brought up for me the very essence of what is wrong right now for many of us in the Church. I don't want to look back and be critical. I love what's going on here, but I think when it really gets down to it, there's a lot of broken hearts in this room.

Chris Lowney

Nice comment. It's really interesting to see how Evangelicals interpret their role. What's essential to be a good Evangelical? Work to lead others to Christ. We would probably

say that, but in a rather more diffuse way.

The concept that part of my role is actually to bring somebody to the community is what many Catholics feel. And many of my feelings would be the same as yours. But here's what I would also say to myself: one of the ways a community becomes more accountable to itself is to say, "Okay look, now I invited the guy and it wasn't a positive experience." It forces us to have an encounter with each other that might be uncomfortable. You raise a really good, and important issue. But, literally putting our foot into it also forces us to be accountable to the broader community and ourselves.

Lori Mirek

Parish Council Chair, St. Raymond's Church, Atherton, CA

That accountability is really tied to openness and transparency, which is a word I like to use in the corporate environment. I was glad to see openness as one of your four aspects of spiritual leadership. We really need to regain the trust that everybody's talking about and be as transparent as possible.



Lori Mirek

That includes everything from finances to mission statements to policies. I think a large part, at least in our parish, of why people haven't been giving is because they just don't have any confidence that there's a strategy and a plan in place that will build the kind of Church that you want to invite your friends to. We have a long ways to go and we need to look to some of those best practices.

Chris Lowney

Sometimes it strikes me that we are careful to communicate things in sort of a paternalistic way, "Don't worry, it's okay. It's kind of under control." And part of my corporate experience was the bosses who get the best results were the guys who sat down and said, "You know something? We have a huge problem and I can't fix it alone. I think I have some ideas, but I don't have the plan and we're going to have to figure out how to do it." That's part of some of what's going on here. People don't perceive the unvarnished reality that we all have to cope with and we are not evoking their sense of mission and desire to kind of help and save something that they love.

Rev. Stephen A. Privett, SJ

President, University of San Francisco

In practice, the new evangelization looks a lot like to old evangelization, this whole



Fr. Stephen Privett

idea of welcoming as being less about inviting people to Church and more about engaging people where they are. It's not starting with the gospel, but starting with fundamental human experiences. It's a way of being Church where you're not in a perpetual argument with the culture. You're in a conversation, and you're looking for better understanding instead of trying to win. I think this pope kind of captures that and what's really important to him is what he's not saying. That's why people are listening, because he's got some credibility, because he's not hammering the same old stuff. There is a freshness that is quite hopeful.

Rev. Anthony Cutcher

President, National Federation of Priests Councils (NFPC)

At the parish level, inviting someone to worship is quite often not the best place to bring somebody new, because one or more of the facets of worship is done not optimally. Don't invite someone to Church, invite them to go with you to the soup kitchen, or invite them to come to an RCIA session when you know the presenter is going to be very good. That way they don't see the priest in his vestments, but they see other people just like them doing mission. And then the question comes, what is compelling these people to do this?

Rev. John Hurley, CSP

Executive Director of Evangelization, Archdiocese of Baltimore

When we look at leadership, we have to remember that discipleship is at the root of it. And that's where the passion and the love and that loyalty that you're speaking about comes to fruition. We have a lot of that in the Church right now. I don't think priests and bishops see themselves as disciples unless the question is raised. I think we see ourselves in the tasks we're doing rather than the overall umbrella fact that we are disciples. When we start using that

language more in connection with leadership something tremendous can happen.

Most Rev. Steven Blaire

Bishop of Stockton, CA



Bishop Steven Blaire

One of the issues that we face today in terms of leadership is the reality that where people experience Church is in the parish. There are fewer priests who are truly capable of being leaders in the parishes. We have a lot of priests, and many of them are very good priests, but they're not all capable of being pastors of the parishes, and our hands are a bit tied. The great challenge is the priest who is a pastor but who does not understand this concept of leadership or chooses not to embrace it.

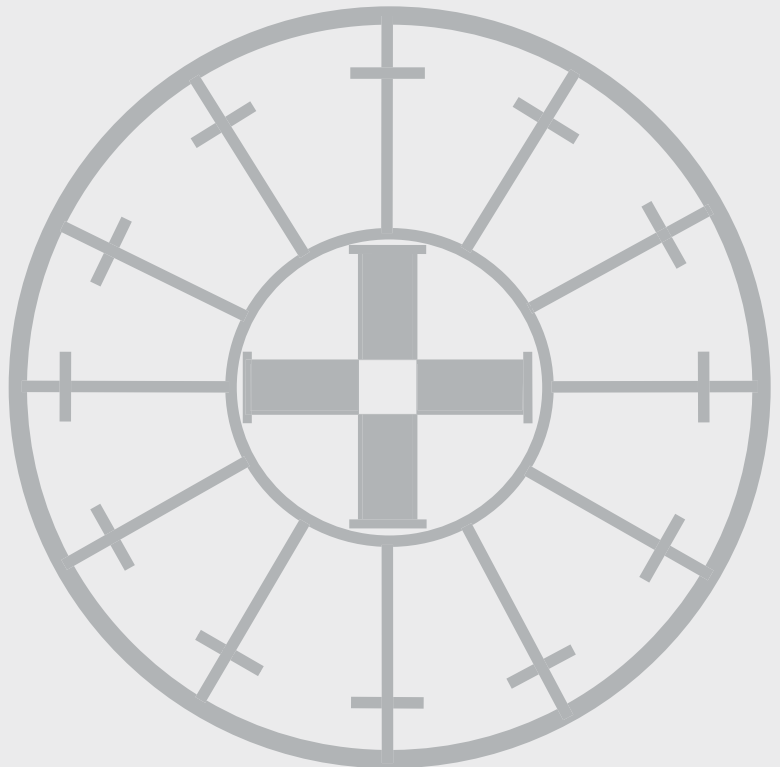
Rev. Robert Beloin

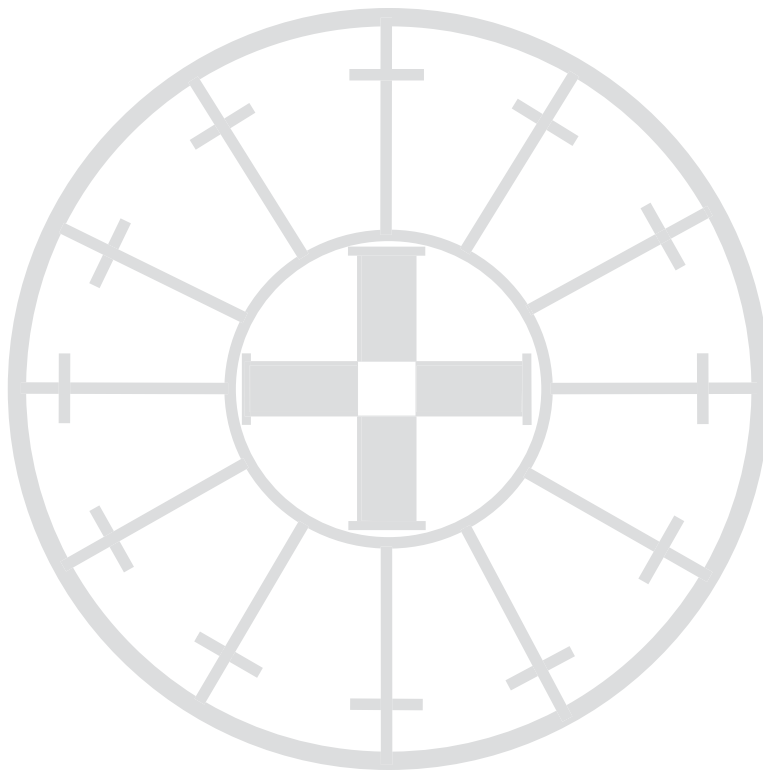
Chaplain, St. Thomas More Catholic Chapel & Center at Yale University

If a business lost one percent of its customer base every year for 40 years, they would say we have to do things differently. What keeps us from saying the choice is, keep doing what we're doing, only work harder at it, or try something different? What gets in the way of us seeing that something fundamental has to change?

Chris Lowney

That's the question, and I invite others to answer that, because I don't have a great answer except to say that culture change is always really, really hard. Everything is more loaded when you're in a revealed religion. You don't feel exactly the same freedom. Often when you're losing one percent of your customer base every year, you are sitting on a burning platform. There's nobody who has any doubt that business as usual is acceptable because we're gone. We're in a very different context, and I don't think we feel a burning platform. It doesn't come across with the same feeling of urgency. We need to do something, either positively speaking because of the depth of our discipleship, and we have something good and true to offer and how could we stand by and not offer it to more people.





THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting



EMPOWERING YOUNG PEOPLE TO FULFILL THEIR BAPTISMAL CALLING

Katie Diller, *ESTEEM Project Manager*

Rachel Hochstetler, *ESTEEM Participant, Stanford University*

John Kerrigan, *ESTEEM Site Leader, Catholic Community at Stanford University*

Megan O'Neil, *ESTEEM Participant, Stanford University*

Pat Rice, *ESTEEM Mentor, Stanford University*

John Kerrigan

I'd like to start with a short story from the Kerrigan family dinner table. I have a 17-year-old vegetarian, a 13-year-old carnivore, and a 7-year-old macaroni and cheese gourmet, so you can imagine that dinners are never state affairs in our house. Typically, the dinner conversation revolves around the goings on of the day or imitations of teachers' idiosyncrasies. But from time to time, we play a game called "table topics," a little box of cards

that have questions on them, open-ended questions that are meant to spur discussion. So, a few weeks ago during one of our "table topics" sessions, the question was: "If you could know only one thing about the future, what would it be?" Whereupon my middle child said, "Dad, you should sit this one out because you're so old, you don't have much of a future!"

Now, this is the same child who, a few years ago after she and I had a disagreement over homework, marched into the kitchen, hands on hips, and said, "Daddy, I want your divided attention." I said, "Honey, divided attention? You've got it."

I share these snippets of family bliss because I think they bring to mind larger questions that relate to this panel, and to the Leadership Roundtable overall. And one of these questions is, does the Church have much of a future? How can

we find effective ways of communicating and evangelizing to young people and early adults whose attention is very divided and who live in a very distracted, complex worlds?

I'm going to give a few more factoids, sort of dour statistics, some from PEW and some from CARA. Only 30 percent of Americans who are raised Catholic are still practicing. Fully 10 percent of all adults in America call themselves ex-Catholics. And the number of marriages celebrated in the Church has decreased dramatically by nearly 60 percent between 1972 and 2010.

Now, I would say that is quite characteristic of a burning platform. If I had cited those statistics without mentioning the Church, you might think I was talking about JC Penny or Sears. I think that similar to these organizations, it's not necessarily the fault of the most recent leaders, but a collection



Deacon John Kerrigan

of problems including norms and unwillingness to change. Fr. Bob Beloin, [Catholic chaplain at Yale University], had asked a question: "What if you had an organization where your membership was declining by 1 percent a year, if the number of people in the pews was declining by 1 or 5 or 10 percent a year, and that was compounding over one or 10 or 15 years?" I think you have a distinct crisis, and I think it underscores the urgency of evangelizing young people and reversing some of these trends, which is what this panel is about.

Rather than go on with the reasons for decline in membership and my simple solutions to it, let me simply say that ESTEEM is first and foremost about relationships. It's students being invited to explore their relationships with the Lord, and God's call to them as servant leaders. It's students' relationships with each other, their relationships with their mentors, and their relationship to the great Catholic spiritual and intellectual traditions that we all possess and having a lived experience of those traditions.

Let me say a word on my involvement with ESTEEM. A little more than four years ago, I had lunch with Fr. Nathan Castle, the director of the Catholic Community at Stanford. Before lunch, I didn't know anything about ESTEEM, and after lunch, I was running ESTEEM!

We began with ESTEEM at Stanford with 9 students the first year, three years ago, and then 24 students last year. We've had between 25 and 30 participants ranging from undergraduates to postdoctoral fellows. At Stanford, there are actually more graduate students than there are undergraduate students.

Katie Diller

ESTEEM seeks to reverse the challenge of having young adults remain an

underutilized resource in the Catholic Church. We seek to train, encourage, and support young adult Catholics in their baptismal call, using their gifts and talents and serve the Church. Sites recruit college-age Catholics who are already committed to their faith, who command notice for their intellectual acumen, innate leadership skills, passion for excellence, and their desire to serve the Church in various disciplines and backgrounds. These students are an elite group: they're socially motivated, they're from diverse majors, and they're the future leaders of our Church.



They make a significant commitment through the course of an academic year and sometimes multiple academic years. They attend an opening retreat to build community and to share their faith stories so that they know one another. They commit to a 12-session catechetical program usually spread across their academic year. Topics include ecclesiology, Catholic social teaching, understanding structures of Church governance, Catholic leadership and skill development, and much more. Sessions may include guest speakers, field trips to regional service sites, study of spiritual books or articles, and certainly the most important element is group debate and

open discussion of current events in Catholic thought and culture.

Every student is paired with a mentor who shares their career and service interest. These mentors are already leaders in their parish, their dioceses, or local Catholic nonprofit network. Finally, they take part in the national capstone conference that brings together students from all the university sites for a weekend of Catholic leadership, enrichment, and training. We are at 12 sites currently across the country. These students love the time they spend together at the national capstone conference. So far, for the last three years, we've gathered at Yale University.

The schools involved are UCLA, U.C. Berkeley, Stanford, UNLV, Texas Tech, Wash U. in St. Louis, Purdue, Ohio State, Michigan State, Robert Morris in Pittsburgh, and Yale University, with more in the pipeline.

Rachel Hochstetler

There are many things that make ESTEEM special and incredibly valuable to the Church. Two of the things I want to talk about are the opening retreat that Katie just mentioned, and the quality of the theology content that is presented and discussed at our meetings.



The retreat occurs at the beginning of the year. Everyone in this room has attended, facilitated, or led more retreats than we can count, so I don't need to sell you on the value of retreats and having time to draw closer to God and reflect on your life. However, the ESTEEM retreat is different. It's not just about facilitating a good experience for the individual and the individual's faith development. It is optimized, both for the individual's experience at the retreat and for the community building. I think that's really essential because there are 25 to 30 individuals. At Stanford, those are graduate students and undergraduates who don't necessarily know each other.

At the retreat, you have time to reflect personally, but then a lot of it is getting to know the other people in your ESTEEM cohort. That's where the value comes in because that's where you get to know people: you build a community, you build a sense of authenticity and vulnerability. John mentioned the importance of relationships to ESTEEM, and that is really pivotal. They start to develop here at the opening retreat.

Something else that makes it really special is having peer speakers. There's an automatic sense of authenticity, credibility, and trust, and I think that's really what kicks the retreat off for being a place to be yourself and to be vulnerable. One of my favorite authors says, "Imperfections are not inadequacies. They're reminders that we're all in this together." To me, the opening retreat of ESTEEM is about reminding us that we're all in it together as students, as college students that have a million things going on, and as Catholics, and as humans, and incorporating that Catholic social justice teaching.

You leave the retreat with the sense of enthusiasm for the year ahead and a new community. You have these meetings that are spread out throughout the academic year based on the school schedule. I'm sure every ESTEEM site has incredible theological content. I have to recognize John because he truly was a relentless champion for recruiting the best guest speakers for our class. The quality of the speakers that visited was truly phenomenal. John can give you a list, and it's just astounding the people he recruited to come speak to us. It's so important because the people who come to speak talk about everything from Church history and Church governance to Catholic social teaching and more applied leadership skills, both within the Church and outside the Church. The power and witness of expertise of these guest speakers were captivating and enlightening.

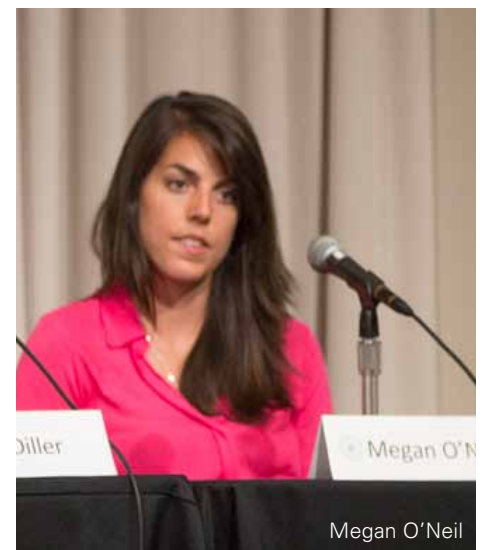
A really special thing about ESTEEM is that you have people in it who are cradle Catholics. They were baptized, went through the sacraments, but never had a personal faith relationship. You have people who have been engaged with their faith at all levels of their life. And you have everyone in one room with someone who's an expert at what they study or what they're speaking about, and they're able to draw in every single person in that room regardless of their faith, background, or experience in the Church previously. We have small group discussions about each of these topics to really wrestle with and grapple with the content that's just been created and to hear each other's opinions. It's invaluable to have a community that's so trusting and open.

Last but not least, John always made sure to include scripture in our meetings, and I think that's really important. We always read the upcoming gospel for the week

and reflected on that. Again, building a sense of community and relationship, and growing in our faith together. If I had one way to describe ESTEEM, it would be faith seeking understanding, and leadership skills, because I truly think that's what this community is all about.

Megan O'Neil

One of the greatest things about ESTEEM is that you bring together all of these people into a room. You have mentors, you have undergrads, you have freshmen, sophomores, juniors, seniors, graduate students of all ages, and everything is off the table except faith. You're gathered there as Catholics. That is so great because it allows the relationships to be really genuine, and to be really founded on what you're trying to get at. No one is trying to impress. Everyone is there to learn, and to seek, and to ask questions, as Rachel mentioned. I think that's really valuable because I don't think there are many other opportunities in the Church for an 18-year-old to be conversing with a 50-year-old and asking the same questions about faith.



Aside from the professional relationships and the networking, it really is fun, especially at Stanford. We love to go to our meetings and there are friendships

that happen outside of ESTEEM. It really is a community at Stanford, and that really has been such a blessing for all of us to make those connections.

I went to the capstone conference this past year in April and Rachel went the year before. You are with your own ESTEEM community and the vast community that is the national ESTEEM network. It was really great to see these people that are having parallel experiences, that are asking the same questions at different universities, and that can bring a new perspective to something that you have talked about. I know that the capstone conference this year was an absolute blast. I made connections with many others from different ESTEEM sites. We all went out one night after the conference and just got to know each other. I think that's really important, too. The mentorship, theology, and scripture are so integral, and the icing on the cake is making these friendships and lasting connections. The capstone conference was a great way to see all the people that are really involved in it.

Pat Rice

You posed the question of whether the Church has a future. I'm sure that you will feel the same as I do when I hear these young people speaking, and you'll say that the Church definitely has a future. We may not know exactly what it looks like or what shape it may take, but it definitely has a future. I look at it from quite a different perspective, from the other, older end of the lifespan.

My experience as a mentor has been richly rewarding for me and for all the mentors that I've spoken with. I think the role and the value of the mentor is to listen to the hopes, aspirations, beliefs, and doubts of the students, and to help them put some



perspective on their current life experience and on the information that they are getting from the speakers. Sharing our own path as a Catholic who seeks to make a difference in the world. As one of our mentors, Valerie McGuire, a research scientist in epidemiology at Stanford says, "I realized after my two diverse experience that for me, it meant being myself, sharing my experience of faith, how I integrate that faith into my professional life in the area of the sciences, and being a good listener. Being able to dialogue about our differences while still having the same fundamental belief system. It also doesn't mean talking about religion all the time, but walking with that person for a time, and connecting in ways that might not be too obvious."

We have a variety of mentors at Stanford and I'd like to mention a couple of them. Bill Galliani is a partner in a local law firm specializing in intellectual property law. Bill has also taken his entire family, his wife and children, to work in a poor rural parish in Peru. Dave Mount is a graduate of Yale. He's an associate in the venture capital firm of Pioneer Perkins and also teaches with his wife in the pre-Cana courses for the Dioceses of San Francisco and San Jose. My wife Claire, who's a marriage and family therapist, is quite a connector, and she connects with people.

She's connected especially well with the students that she has mentored. She was asked to be a co-sponsor for her most recent mentee's confirmation. So she was able not only to participate in this significant event in this young woman's life, but be with her family at the same time. Another lawyer, Jack, is a partner in his law firm and a judge. He's a Eucharistic minister in his parish and he helps deliver Meals on Wheels. With Jack and Kathleen being of my vintage, we have a perspective that these young people just haven't been able to have with their shorter life span. We lived through Vatican II; they've heard about Vatican II.

One mentor, Ron Peterson, told me he was terrifically inspired by the student that he was mentoring. That's another thing for mentors: it is an inspiration and a joy to be able to be with these people. I feel like not only can I be with a group of young people, I can have a course in theology without paying any tuition. He told me he was terrifically inspired by his mentee, a young man named Carl, who last year was awarded the Cardinal Bernardin Prize for Leadership.

For 16 years, I volunteered as a cuddler in the intensive care nursery at Lucille Packard Children's Hospital. I took the student I was working with on a tour of the hospital and the intensive care nursery. While walking the halls of the hospital, we had quite a discussion on orthodoxy and orthopraxis. Although we had some different perspectives on orthodoxy, we fully agreed on orthopraxis.

He offered me some comments on the mentoring component: "It's given me a chance to access the life experience of Catholics who have been in the Church much, much longer. And to take stock of the mismatch between my expectations

and my abstract values, and the way the life of the Catholic faith plays itself out in the parishes and on the street on a day-to-day basis.”

John Kerrigan

With Pat’s comments about mentors in mind, and particularly that last anecdote, we obviously don’t have a particularly ideology. We take on all comers. We’ve had people who could be fairly characterized as very orthodox or traditional. We have people who are nominally Catholic and curious, and maybe much more relativistic. And we try, in the curriculum and the discussion, to just play it right down the middle of the alley because we think that the alley is so wide that we don’t need to go to the fringes. We can remain authentic and still stay in the middle of the alley.

There was a student a few years ago who joined the program with all the answers, and who could spout doctrine almost verbatim. He was an extremely bright student. At one point I said to him, you seem to be sure about everything and I’m not sure about anything. I think he was able to see through the curriculum, and especially through the relationships with other students, and through the discussions, that things were actually a bit more nuanced.

There was a woman in our group a few years ago whom I happened to sit next to at a dinner. She was talking about how her roommate was doing bad things and how she was immoral, and how wrong she was in what she was doing. I can only imagine what those things were, but I said to her, have you ever sat down and talked with her about who she is and the background and context of her life? She said no, I don’t need to do that because she is wrong, and that’s all that matters. I said to her, I tried that once in

my marriage—telling my wife that she was wrong—to very bad results. I don’t recommend that as a way of getting on in the world! We had an interesting discussion after that. So, it really is about seeing the full spectrum of richness of the Catholic intellectual, the Catholic social tradition, and the Catholic spiritual tradition. But there’s no need to go to the fringes, one way or the other.

One question I have for the panelists: The Leadership Roundtable emphasizes excellence and best practices in Church matters. Everyone who attends these Annual Meetings subscribes to that notion, as well as to incorporating the expertise of the laity. When it comes to supporting evangelization of teenagers and young adults, what key messages would you have for this group as to ways it might be done best or how it’s done poorly?

Rachel Hochstetler

I think about the young people I know at Stanford and in the area, and everyone’s talking about startups and new ideas. People get so excited about new ideas. And being in Silicon Valley, there’s this culture that says, if there’s a good idea, you put your energy and your time behind it, and it becomes a force to be reckoned with. We have all these startups, and most of them fail, but a lot is learned in the failure and the iterations that come from that trial.

In terms of harnessing that energy and the innovative spirit, the Church could gain so much from its young people. There is a trend that started in Silicon Valley, but it’s everywhere. Young people are some of the most passionate people you’ll ever meet. If you go to any college campus, you will very quickly pick up on the palpable excitement that is there. If the people and the Church are able to give young people

in a parish the opportunity and authority to take something and run with it so they have a sense of ownership, you will just be blown away. I think it’s just a matter of giving that opportunity. I’m young in my parish, and I was asked to join the finance council, which was very flattering. It’s something that I never would have pursued on my own because I’ve heard about the finance council, but I don’t know exactly what they do. It wasn’t until my initial meeting with one of the members that they explained it, and I expressed concern over being able to add value.

It’s about having a diversity of opinion and knowing that there are other people in the Church my age, and that my opinion does matter. Sometimes it’s just extending the invitation because people are eager to get involved, and it’s just giving them an outlet for their energy and enthusiasm.

Megan O’Neil

I think that within the Church, there is such a long history, and a lot of the people in the pews are a lot older than Rachel and me. I think there’s an intimidation factor there, and young people see these people that have been going to the same parish, sitting in the same row, the same seat, for years and years, for probably as long as we’ve been alive. And you think, gosh, how do I get past that barrier? How can I make a relationship with that person? How can I get involved in something that seems so secure? I think that parish leaders extending their hands and saying, we do want you, and here’s a doorway into this community, and here’s where we could use a new, fresh idea. Getting rid of that intimidation would take us leaps and bounds in the right direction.

Pat Rice

I’m sensitive to the term ‘evangelization.’ I don’t think young people should be over-

evangelized until they feel understood by you. I think our ability to influence anybody, but particularly young people, is directly related to the degree that they genuinely feel that you understand them. I think that's the first plank on the deck of your relationship that you can begin to move ahead.

All the mentors have talked about listening. With listening, you have to be genuine in your faith and in your belief and practice, whatever shape that particularly takes for you. Young people will spot a phony immediately. It has to be genuine even if you might not be too comfortable without it. That genuineness and that empathetic kind of listening and understanding, and especially that unconditional love, really inspires them. Your love is about something that really matters in this world and can make a difference. I think just to have that mind and approach to interacting with these young people is incredibly rewarding.

Katie Diller

One thing that most ESTEEM sites do when they recruit is not necessarily recruit the students who already are the super Catholics, the ones who go on all the retreats and serve in all of these service projects, but students who come to Mass sometimes, or attend an event and seem like they are really inspired, but then fade away or get too busy.

We actively recruit those students who are one foot in, one foot out. The invitation is huge, and I'd say that over the last three years we have created over 200 ESTEEM alumni of educated, thoughtful, interested young adults. They're available. They're a resource to you and your foundations, your organizations, your parishes, your dioceses. One thing that you could do

is create internships—paid, unpaid, whatever works.

The way the educational system works today is that there's one person sitting here, and there's many people sitting out there. The people out there don't necessarily get the chance to meet the person at the podium. That's the way our education system works today, and it wasn't always like that. A lot of our Church history is filled with people like St. Ambrose and St. Augustine, St. Francis, St. Jane de Chantal—people who were closely mentored. A mentor has to give a lot. What can a mentor do?

You could walk into your mail room and give a copy of your favorite book to a young adult who works in your mail room and say, "this is my favorite book, I'd love for you to read it," and then walk away. And they think, "wow, I just met the head of the organization, and they gave me their favorite book." That's transformational. It's invitational. That would be something that you could certainly do with ESTEEM alumni or anyone in your organization. Even your own children. Bringing your children, your nieces, your nephews, the guy who works in the mail room to an event like this, sponsoring them would let them see the excitement within leadership within the church.

Rachel Hochstetler

I wish you all could have seen the energy at the end of the capstone conference this year, and I'm sure in years past. Everyone there was itching to get in somewhere. We would love an opportunity. Every single student there wanted to find a place in a diocese, in a parish, in a Catholic organization, and I think Katie's ideas are great, and there's plenty of us out there.

SELECTED QUESTIONS, ANSWERS, AND COMMENTS

Kirk Hanson

*Executive Director, Markkula Center
for Applied Ethics, Santa Clara University*



I'm worried about the transition from this wonderful relationship-based experience on campus, which I think has been created at a lot of Catholic communities over time. But it's that transition beyond the time in school. I see so many of those very dedicated people going out and encountering weak parishes. And I wondered if the students had other suggestions about how we might help the transition into the parish as Rachel's experience of being invited to the finance council.

Katie Diller

That is the goal of the ESTEEM program. It's part of the mission. It's part of how the program is run. We work very hard to make sure that students have a sense that it's not necessarily going to be easy when you leave campus and find a parish. When

you graduate, it's not going to be handed to you. For many students, there isn't a natural transition. Sometimes they take a job somewhere in the country where there isn't a parish that's warm and welcoming to young adults. And we talk to them about that and prepare them. That's part of the capstone conference experience. We usually have a panel of young adults who've been out for two or three years and they share their experience of having to look around for the parish that fits them well, or for service opportunities that they feel called to.

We encourage them and try to build their confidence to say okay, if it doesn't work the first month, keep looking. You belong to us for the rest of your life. It might not happen in the first three months, it might happen later. One of my favorite emails was from one of the students I had my second year as site coordinator for ESTEEM. He went to Virginia for the summer for an internship. He emailed me and said, "everything you said came true." And I thought, "yes!"

He went to a local parish for about four weeks, and he said that he just felt dead inside every time he walked out. That's unfortunate, and perhaps that parish is able to serve others with different needs at a very high level. But they weren't serving his needs, and he said he felt the confidence to try out a couple other parishes. He said he found a parish about 45 minutes away. "I had to drive 45 minutes every Sunday, but I found it, and the people there were awesome, and they spiritually feed me, and I'm so happy to be a part of that parish. Thank you for

teaching us that we can keep looking." And that's a huge success for us. We don't know what the first parish would have done for someone else but they weren't doing it for that young man.

Megan O'Neil

I think, as ESTEEM has been around for more years, we can tap into the alumni network there and connect with them. Maybe they know people in the parish, and that might be a few years down the road as we get a larger database. I think if we can really nourish that community, that's a great way to fill the gap.

Rachel Hochstetler

There's a Facebook group for ESTEEM members. It's a network you can tap into. The other thing is when you see young, new people appear in your parish, invite them to dinner. That is something that the Catholic community at Stanford does very well. Fr. Nathan Castle invites people to lunch or coffee, and he'll treat. Just to make time and get to know them. That touches on that relationship piece that's so important. These are people who really value the relationships in their lives, and they're hungry for new ones, especially in a new area. That makes people feel at home immediately.

We are always accepting new lectors and Eucharistic ministers. That's how I first got involved. I think having someone who can initially reach out to build a relationship and a friendship, maybe not in the formal mentor role, but some type of relationship, and then being able to pitch being a Eucharistic minister once a

month. It builds because you grow in your relationship with the Church.

John Kerrigan

There's the invitation component that I think is really important, and then there's the need. For example, one of the ESTEEM alumni graduated from the Graduate School of Business at Stanford last year, and he's working and volunteering at the Archdiocese of Chicago in finances and strategic planning. I could go into details as to how he networked his way to that position, but he is adding a lot of value to their process because he has this fresh perspective from this world-class graduate school of business program.

Sally Vance-Trembath

*Professor of Theology,
Santa Clara University*

I'd like to make an observation because I've visited John's ESTEEM group, and it focuses on the mentors, whom I think are Vatican II Catholics. They've been formed in the Church where the focus was not on power, but about lived life and being ministers of the Church so that we're called here by baptism. To be around someone like Pat, who is Catholic from the inside out, expresses it sacramentally and who can talk about it theologically, is where the leadership gets translated.

Pat Rice

I agree with you. Having lived through Vatican II and being what I would call a Vatican II Catholic, it's exciting. I think we have to meet people where they are. And I think most of the mentors I know are able to do that. Part of what it means to be a so-called Vatican II Catholic is a broad scope in terms of the spirituality

that is so important and that is being manifested even in the people, young people particularly. Their spirituality and their passion are extremely valuable, and there's no need to try to re-baptize it. But together I think we can come together and grow into the future together.

Penny Warne

*Pastoral Associate, Holy Spirit and
Our Lady of Refuge Parishes, San Jose, CA*



Penny Warne

We've been trying to, for as long as I can remember, engage young professionals or young adults in the parish itself. I wonder if there are some elements of the model from campus life that could be trained or brought to the parish level to be able to do that, and what ideas you have about doing that.

Kate Diller

We are working with a few dioceses right now to talk about how to adapt the ESTEEM curriculum for dioceses and ministers with the slightly older subset of young adults in their late 20s. So, we're in communication with at least three dioceses right now.

Rachel Hochstetler,

*responding to a question about being
a young woman in the Catholic Church*
As for the role of women in the Church, that is something that I spoke to Katie about after one of the panels at the capstone conference. This is the hardest thing for me about being a member of the Catholic Church. I sometimes wonder if I can be a full member. When we knew John before he was Deacon John, my husband and I were talking, and I asked if he would ever want to become a deacon, because he's someone whose faith is really important in his life and we were in ESTEEM together. We talked about it for a long time, especially because we saw John going through the process. He said he won't make any concrete decisions, but he doesn't think he would, because it's something I couldn't do.

He and I have had many conversations about my role in the Church and his role in the Church. I feel so blessed to be a part of this Catholic community at Stanford where, every once in a while, we have two women who will give part of the homily. Being in that type of setting is phenomenal and incredibly inspiring. I was involved in the liturgy through reading and serving as a Eucharistic minister, and then being asked to join the finance council. I realized I can't become a deacon, I'm not going to become a nun. I'm married and I love my husband, and that's my calling.

But there's a way for me to be a bigger part of our parish, and it may not have a specific title. It may not get the same level of recognition, but it's a way to shape things and a way to shape my skills. I can't put labels on it, and that's okay, but it's something very challenging for me. When we move from Palo Alto, it may be more

challenging to find a parish that's more open to having women in meaningful leadership roles. But I'm excited and encouraged by my ESTEEM experience and my experience with the Catholic community at Stanford to take that on.

Rev. Anthony Cutcher

President, National Federation of Priests' Councils



Fr. Tony Cutcher

I was recently a pastor in the wilds of northwestern Ohio, very rural. One of the critiques of the parish was that there was no programming of any sort for young adults who weren't married. It was either middle-aged and old folks or young families. So if you didn't have a husband or wife and at least one toddler, there was nothing for you. I'm sure that's a fairly normal occurrence. Can you give us some suggestions that we can take back to our parishes for young single people?

Megan O'Neil

Just graduating from college and moving into the world, what I'm looking for is a community of peers, and people who I can interact with at these events and outside of events as well. I think that a

first priority is just getting those people together. Maybe it's not theology or catechism, but maybe it's just going out to dinner once a month just to socialize and get those young people talking. I know that would make the Church that much more welcoming and much more enjoyable to go if I had friends at Church. The social aspect is important for people who are 25 to 30 and not married.

Rachel Hochstetler

It's about building community and social relationships because just like ESTEEM starts with a retreat, you need to build those trusting relationships first before conversations can go to the next level. Just having a place where people feel like they belong is the first step.

John Kerrigan

I would imagine most of us have had this experience with Cardinal Bergoglio being elected pope and taking the name Francis. In some ways there is a *kairos* moment, and it's not a commentary about Benedict or John Paul II. I think for some of us the air seems to be ionized with a sense of hopefulness and an invitation to be entrepreneurial, and we can seize that.

In one of our ESTEEM meetings this year, people were able to share their hopes and insights and opportunities through the projective of the new pope. Sometimes it's as easy as having a conversation over pizza with the recent college graduates and talking about the new pope. Things that you wouldn't think are inviting, so to speak, actually are.

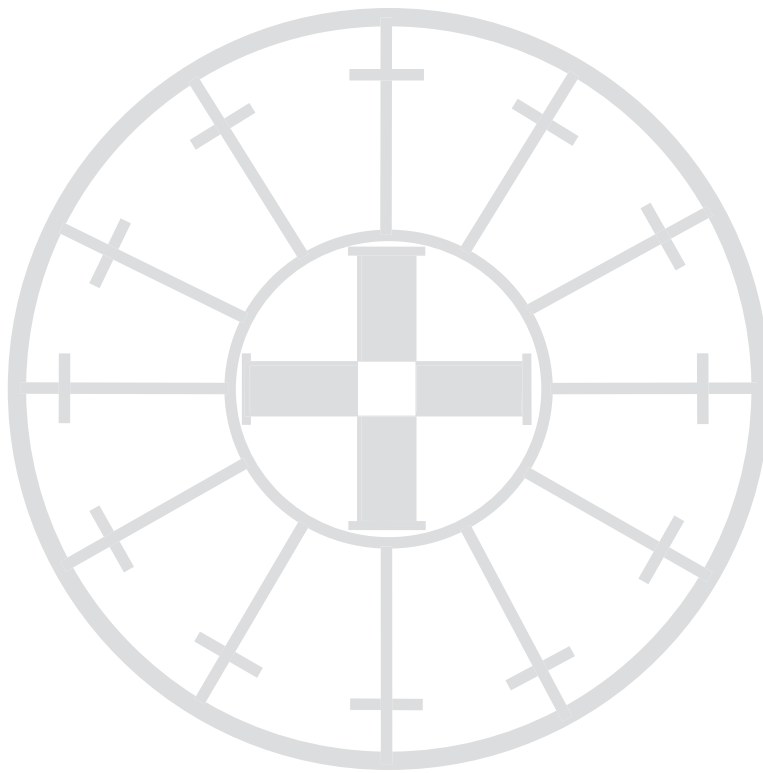
Katie Diller

One thing that is critical after fellowship is remembering that Jesus invited all the so-called wrong people to be his disciples. He didn't just invite them to be his

disciples, he expected them to contribute. So when you are trying to build a young adult network, don't necessarily look for the perfect young Catholic. Look for the one that was raised Catholic, and that's how they describe themselves. Invite somebody who maybe comes once a month. Invite that person to be in the parish finance council. When they go to the finance council meeting, they might wonder why they were asked, but they go. They may be completely transformed by the experience of seeing what the parish needs and what the parish is doing with its finances. Then you've got a full-time Catholic on your hands, it's fantastic. Some parishes invite young adults to write the homily once a month. That's terrifying, I'm sure, but aren't you curious what they would say? It doesn't have to be the full-time Catholics. It could be the half-time Catholics that write this week's homily. Just once. That's exciting. You don't need to invite the perfect people. Invite the weirdoes. They can give a lot, and you'll get a lot!

Pat Rice

I think we should also be smart enough to learn from other Churches. There's a Presbyterian church in Menlo Park that is so vital. It's not a mega church but it could be. They do a lot of things with their young people. They are entrepreneurial. I think we can learn from that.



THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

CO-RESPONSIBILITY FOR CHURCH FINANCES

Tom Healey (moderator), *Treasurer, The Leadership Roundtable*

Patrick Markey, *Executive Director, National Collections Office, United States Conference of Catholic Bishops*

Brian Hughes, *president of Hughes Growth Strategies, LLC*

Mary Quilici Aumack, *Executive Director, The Catholic Foundation of Santa Clara County*

Tom Healey

Our theme this afternoon, co-responsibility for Church finances, has three major topics. One is best practice in investments. Second is best practice in fundraising and stewardship. And the third is best practice for parish business managers and finance councils. Woven into this topic are the Catholic Standards for Excellence and how they can be a resource for encouraging and highlighting financial best practices. We will also discuss accountability and transparency.

Patrick Markey

My office raises funds and manages how those funds are used. We work and see the Church from an international perspective, and we coordinate with the Vatican on a regular basis. Money is being allocated throughout Eastern Europe, Latin America, Africa, and the United States. The bishops organize themselves by committee, and those of us who work in Washington staff the committees. I staff a committee called the National Collections



Patrick Markey

Committee that includes nine bishops and six sub-committees totaling 44 bishops.

My committee focuses on accountability, transparency, and donor intent. The committee published a document, approved by the body of bishops, about managing collections in parishes. The document begins with national collections and then discusses how to manage funds on parish and diocese levels, focusing on donor relationships. We discuss fund raising in relation to canon law, civil law, and ethics.

As times have changed, we've responded by becoming more transparent, and we've begun to educate people on issues of co-responsibility. As lay people, we are taking responsibility. They've taken it seriously, especially here in the United States, to work as partners in the Church.

I want to comment about nonprofits in general. As a result of my nonprofit work, I have observed that our budgeting and financial planning are out of proportion with our action. This is happening on both the governance and staff level. We need to start tracking financial statements and paying attention to how money is being spent, and then direct funds to urgent issues.

I work with planning at the Bishops' Conference and also with other Catholic organizations, consulting on their planning processes. We focus on the importance of budgets. We need to conceptually turn it around and say, "How can we be focused on results? How can we hold people accountable, and the institutions

accountable their actions?" I'm finding resistance to the need to evaluate results and people in the nonprofit and Church worlds. We need to be aware of this resistance, and address it because it is not the best practice.

There's the hierarchy that has its role in governments and leadership, and there's a role for lay people. How do those things interact?

In my experience working with Vatican officials and at various bishops' conferences around the world, I get a vision of things that a lot of people aren't aware of through my work. I see women working in leadership capacities on the local level, and lay people run many of the official offices. There are different roles and responsibility that exist. As a Roundtable, we have to keep in mind that most bishops would feel they fit as one person among many at the table when the Church is being discussed. There is a hierarchy, and we need to be respectful of that structure while we discern and enact our own role and vocation in this relationship.

I direct your attention to two documents, written in the 90s, by the bishops. One is a "Stewardship Disciple's Response," a document about stewardship. The other document is "Go and Make Disciples," written on evangelization.

The bishops meant for these documents to go hand in hand. If we are good stewards, then we evangelize. The abuse crisis was a moment when we weren't being good stewards. We weren't taking responsibility and responding in a way that was credible, and therefore we weren't evangelizing. And I think we can say that corporately, all of us together that this is a reality that we have to recognize. We need to apply this

concept of stewardship and evangelization when we consider finances.

Pope Francis is calling us to follow Christ by being good stewards and to evangelize. At the Bishops' Conference, it is the staff's job to implement the plans of the bishops. Those who are often doing the work are lay people, and there's a co-responsibility of tasks in place. In my work, I follow the lead and direction of the bishops to successfully communicate our message. As the Church comes alive, everyone falls into his or her proper place. This is vital for transparency.

The system must function in its entirety. If we don't follow the intent of the donor, eventually, the donor is disillusioned and stops giving. A co-responsibility where everyone is in his or her proper roles leads to transparency. And that's where something like the Leadership Roundtable and professionals are necessary. In the Christian life it's always about unity. It's about working together. The call deep down is a call of stewardship that leads to unity so that we can evangelize.

The Church has to be an organization that has a higher model. The document distributed by the bishops is calling the Church to be a credible witness that evangelizes.

Brian Hughes

I will discuss stewardship from an investment standpoint.

If you look at the market place in general, you can see what other religious institutions are doing. The Episcopal Church Foundation has pooled its investments for the benefit of the greater organization. They offer a balanced and fixed income portfolio, while incorporating



Socially Responsible Investing (SRI). The Evangelical Lutheran Church in America placed six billion dollars in nine funds, incorporating SRI and positive screens. The Jewish Federations pool funds. These are more regional funds, but it gives the opportunity for smaller organizations within the Jewish Federation to consolidate their assets. I was shocked to learn that there was no a great example of a Catholic organization that is doing this on a national or regional basis.

What you should be thinking about in the marketplace from a client standpoint, when buying investments, are common principles. Independence, transparency, access, and scale are key components when making investment decisions. Global reach is important in terms of access. Most of the programs that I've seen don't have access to the talent or networks around the world that give them the ability to be on the ground and know where to invest when it's needed.

Other elements you want to consider are the Catholic values discussed earlier, and alignment of interests. You want your investment expertise to be sitting on the same side of the table as you and that is difficult to have happen. Diversification across assets is important to maintain.

We've learned very quickly that even the organizations that have \$50 million, \$60 million, \$80 million, \$100 million, or less, have very vanilla solutions. The reason is they don't have the resources or the capital to get broad access and the expertise that can build the portfolios that are best in class. What should your institutions, your parishes, your dioceses be thinking about as you make decisions to get the best investment solution?

If you look at how you can access best practices in the marketplace, you will find a variety of solutions. Brokers and investment consultants play different roles. Brokers are typically commissioned. They are partially aligned with the investor's goals, but at the end of the day, they sell a product and they get a commission. Research into the financial crisis suggests that it was partially caused by this lack of aligned interests. Products were sold that may not have been in the best interest of buyers and purely for the purpose of generating profit or assets under management.

Investment consultants play a very different role. Typically they are non-discretionary, which means they prescribe but they don't implement. You have to know what you're getting and you have to be able to have the expertise to implement the information that a non-discretionary advisor's going to provide. Banks, trust companies, institutions, are great for product, research, global reach, capital, resources and expertise.

Independent advisors represent the best practice around independence. The difference between being independent and being part of a large institution is typically the institution is going to drive what gets sold and what gets pushed. Independent advisors are a place where

the investment buyer has an opportunity to work side by side with no general conflicts about selling particular products.

Fund companies represent a solution or an access to investment that isn't on this list. That is the do-it-yourselfers. Most organizations that we run into, unless they've got two to three million dollars or more are somewhere in that do-it-yourself-it role. They either have an investment committee or a finance committee that is charged with implementing an investment policy and they do that by going out and accessing other expertise. The decisions that are made in that investment committee or finance committee, as you can imagine, typically get made on a quarterly basis. The ability to be nimble is certainly lost in that environment. These are the ways that the Catholic community accesses investments.

The last piece here is the product being purchased. Many of the organizations that we run into have strictly stock and bond portfolios built by a portfolio manager. It may be a bank or a trust company, or they access mutual funds so they can get access to diversification. Mutual funds provide access to different asset classes, including alternative funds, hedge funds, private equity, real estate, and hard assets. There are also allocation funds, which where money is invested in a balanced, growth, or fixed income fund.

You run into the obstacles of making sure that you're aligning the best practices with what is available in the marketplace. The real challenges are in getting access to the right decision makers. The decision making process with the organizations that we are in front of is challenging because you have to identify the right person and understand how they

make decisions. Access and powerful introductions is critically important to be successful for this initiative.

Where does investments fit in the prioritization list of the diocese, archdiocese, college, university, or the family foundation? The family foundation has two roles: grant making and managing the assets that provide the grant making. In dioceses, archdioceses, or parishes, there are numerous obligations and prioritized needs that have to happen.

Here's an example of what we address. Earlier this year we met with an archdiocese and they expressed a strong interest in a pooled investment initiative and went so far as a sit-down meeting. They shared that they were reviewing their existing relationship with an investment consultant, trying to analyze that they were seeing a proper return on their investment. They were ready to move to the next step, a pretty substantial portfolio, and wanted to understand the details of the offering and how the team was built. In the process of scheduling the due diligence meeting my contact said, "Well it's now that time of the year where we've got these other four priorities that are now on my plate, so I've got to move this to the back burner so can you call me in July?" Making and keeping investment reviews and education a priority is a challenge.

Investment committees, investment fund managers, products, and donors are the existing relationships we deal with in our process. Donor relationships are often huge benefactors and they believe that they can bring investment talent and make sure that they have the ability to bring their buddy into the picture. These relationships can be very challenging because those benefactors are really critical to the support of that organization.

When we look at existing relationships and investment committee relationships from a solution standpoint, we feel that there is something in place that allows us to overcome a lot of these challenges. We believe strongly that with your help and the help of the greater community that we can overcome some of these obstacles. We've built a discovery process that addresses shopping and satisfaction stage opportunities.

When you think about the spectrum of buyers, imagine a room of a thousand people, and consider the number of people who have purchased or are considering purchasing a car. We could probably get to 3 to 7 percent. It's not different in the investment landscape. About 3 to 7 percent of the people that we engage are actively looking for a new solution. The process that we used to find the best solution for a specific group is very different than a group I call satisfaction buyers. These are the groups that are unhappy with their existing portfolio, but they are not ready to go shopping for a new solution. We use a discovery process that allows us to uncover needs as opposed to criteria for determining a particular solution. Access to the right relationships is critically important for moving this process along. We need to prioritize opportunities so we have a process that allows us to say that these are the best opportunities for a particular initiative.

Mary Quilici Aumack

This morning we've talked in a thoughtful and hopeful manner about problems: areas of the Church that concern us, areas of our parish life we wish were more vibrant, and communities we wish that we could better engage. There is one



thing that Catholics do extremely well and that is social ministry. Whether you're talking about kindergartners saving their pennies, parishioners reaching out to their neighbors, or Catholic Charities, we do social ministry extremely well. Here and afar, the largest provider of social service is the Catholic community.

We also have strong philanthropic support, but I want you to picture an arc that goes from philanthropic intent to meeting a need. We need to make that arc bigger and more efficient. Bigger is a great thing. When Mitt Romney was running for president, there was a lot of talk about how faith-driven he was, or about how formed he was by his Mormonism, and there was a discussion of tithing. The *Wall Street Journal* did a report on giving by religion. The important number everyone knows about the Mormons is ten percent tithing, and Mormons on average give 7 percent of their gross income. Catholics, on average, give 0.7 percent. By looking at regular Church attendance, and involvement in parish communities, you could argue that it is a much higher number. Average to average, there is room for improvement.

We talk about the concept of compound Catholic philanthropy. The sum is larger than it's parts. It's about saving pennies, gathering on a Saturday to paint the gym at a local Catholic school that simply has no money, an individual multi-million dollar gift, or, in the case of our foundation, a campaign. Here in the Diocese of San Jose, our bishop and the whole team had a vision of starting to provide long-term permanent financial support of the ministries of its diocese. The way I characterize how the success of the campaign is that someone from St. Simon's is going to help someone at Most Holy Trinity go to school 200 years from now. This is the basis of what a foundation is all about and that's what forms the basis of compound Catholic philanthropy.

If you take the idea of providing permanent, reliable financial support through funds to the next level, it's the model of the community foundation. A community foundation is simply a collection of funds put together by people who care about some common need. Our great neighbor is the Silicon Valley Community Foundation, the largest community foundation in the United States. They have almost two and a half billion dollars. We are exactly the same thing: a collection of funds seeking to provide financial strength for ministries and allowing donors to more effectively match their dollars with their philanthropic intent. We do that in a much narrower context. We're focused on the health of the Catholic ministries of Santa Clara Valley. That is, parishes, schools, religious orders, hospital foundations, and Catholic charities. Everyone that comprises this incredible network of outreach.

Because these great ministries ask us for money, we have an opportunity to

see pockets of innovative outreach. Everything from the parish where I grew up, about two miles from here, that serves sandwiches to its neighbors six days a week, 52 weeks a year, to a parish in the east side of San Jose in a very poor area that rents buses on the weekend to make sure that seniors can go to Mass. We want to make these programs bigger and stronger.

Here is the problem: all of these ministries are focused on annual giving, very focused on raising enough money to make sure they don't have a budget problem this year. Almost none of them pay much attention to building endowments, building financial strength for the future and, on the management of investments. Even large organizations, and sophisticated parishes, are not thinking in terms of permanent financial support, how to sustain this from a fiduciary perspective, and how do they deal with the complexities and cost of fund management. That's what we do. That's how we provide support. We are not in direct ministry. We seek to make those who in direct ministry financially stronger and less reliant on annual giving.

Think about types of funds. We have beneficial endowments, a fund that's meant for one or very few purposes. We have an endowment for a cathedral for the physical health of the building. We have a couple million dollars in an endowment fund that sends out a check every year to the pastor and staff of the cathedral. The last two years they asked us if they could save that fund for two years and paint the church. There are many examples of this type of fund management.

We provide for donor advised funds, a means for a family or an individual to make a charitable donation and get the

tax benefit of that and separate that event from the timing of giving out the money. Over time they can decide they want to give to their child's school or their parish. Our community fund helps them see little pockets of innovative outreach match their investment interests.

We have a sophisticated investment committee. We will deal with all of the accounting and administration so that the Catholic ministries don't have to think about that. We give organizations the opportunity to not have to think about the administrative details and, possibly over time, to think less about annual giving.

The last kind of fund I want to talk about is the field of interest fund. These are the funds that allow for ministries to apply to us for money. They created a fund that they intend to give to Catholic ministries in Santa Clara County. It is managed by a bank and its administered by an ethical and good-hearted board who will never have the view that we do about what's going on in Santa Clara Valley from a Catholic ministry perspective.

We have given grants to ESTEEM, other activities in the Catholic community at Stanford, in almost all of the 54 parishes of the diocese, to innovative catechetical programs for very young children, and to five parishes who are doing a cooperative on having a full family-based approach to their pastoral ministry and catechetical programs. We're making a difference with only one to ten thousand dollars per grant, and we could help direct groups to place funds toward these programs.

One type of interest fund that we have is from a member of the Diocese of San Jose who grew up in the Northwest where her mom was a church organist.

She has wonderful memories of going to four or five masses per week. Her family is starting a fund for liturgical music. This fund will be available to parishes through our grants committee. We have three parishes that are going to get together and have a nationally acclaimed music director come and speak about liturgical practice and music. This fund will be available for other donors who wish to support liturgical music. In this way, it will continue to grow.

We have one ultimate measure. Our results will be shown in our deeply broadened and careful grant making. Whether that's writing a check every day or every year from a parish endowment that goes to the parish to be managed how they think best, or whether it's giving a grant to a parish for a kindergarten program, need or initiative. It all stems from our desire to increase the financial strength of the ministries that makes them more effective and efficient in their ministry.

If you come from a diocese that doesn't have a Catholic foundation or you're starting one, please talk to us. We talk to dioceses and archdioceses across the United States all the time and we are willing to share everything that we've learned and our business, and financial models. Mary Dunn is also here and she is the executive director of the Catholic Community Foundation for the Archdiocese of Santa Fe. It's been around a lot longer than we have, so we encourage you to get involved in the model.

SELECTED QUESTIONS, ANSWERS, AND COMMENTS

Patrick Markey

People are generous. We have to recognize that and not be afraid to ask people. That's the first point: don't be afraid.

The only time our collections dropped is when they weren't held. When a parish, or a diocese, will let collections happen, people will give. People will give when they feel that something is valid, or worthwhile. How do we maintain giving? Transparency, returning, and telling people what we're doing with their money is a major piece. We need to have data to demonstrate how money is being used.

Tom Healey

Seven or eight years ago, at the height of the sexual abuse crisis, I think our diocese was very worried about this credibility question. The bishop appointed a group of lay people who looked to look at where all the grants were going, and then report back to every parish their observations and comfort with the process. Because the truth is, even if you get a whole list of things there may be so much information that there's no insight into the data. So, he started a process to give people confidence and we saw a substantial increase in the collection.

Elizabeth A. Donnelly
Trustee, Mary J. Donnelly Foundation

In relation to your Africa collection, how much specific information do you



Betty Anne Donnelly

put up on the website as to where the money is going?

Patrick Markey

We don't do enough. We have to improve. When I talk about accountability and transparency, I speak in first person. We list what our grant policies and requirements are, as foundations, and make it clear whom we're going to give the money to and for the purpose for giving. Then we post lists of the recipients of the funds from that collection. In the materials to promote the collection we try to tell as many stories as we can. The other thing that we'd like to take advantage of is using social media to tell more stories. That's part of the feedback that all of us that run foundations or the more that we can tell people stories of what happened, it not only shows an accountability for the funds but it also evangelizes. It reminds us that we're

not a parochial Church. We are universal Church. Those collections call us to something more. They always call us to not just our own parochial problems but to global issues.

Rev. Brendan McGuire
*Vicar General,
Diocese of San Jose*

One of my experiences working with pastors is that they are fundamentally untrained on how to ask for money. They are terrified to actually have to go out and ask for money. They get no training in seminary at all with regards to stewardship. It is simply a complete lacuna and I don't know how we address that. The part of the thing that is missing is the articulation by the pastor for a vision for which people will give. Can you speak a little bit about how to help pastors articulate clarity of vision?

Mary Quilici Aumack

One thing that we talk a lot about is that the universe of stewardship. Stewardship starts with the worship experience. The parishes that do the best at asking for money don't start there at all. The pastors that do the best start with this concept of a robust worship experience, a welcoming environment, and overt welcoming. A network of invitation to get involved, and then once you get involved your propensity for giving is exponentially larger. Pastors who understand that are still going to be better at growing

the envelope because they've created an essence of stewardship in their communities. We need both to train the pastors and complement the pastors in the area of stewardship. It's important for leaders to recognize their strengths and areas of weakness. It's a combination of training, but you never mandate that the pastor do it alone.

It includes everything from nurturing pastorally to balancing the books in a professional way, and managing people, personalities, and volunteers. It's impossible for pastors to do this alone. The Leadership Roundtable is very much about constructive support for the pastor, making this job possible. I still think that there needs to be actual overt training for the pastors in stewardship. Not just asking for money, but the broad concept of stewardship.

Patrick Markey

Certainly there must be training for people that are in leadership positions, and often there's not enough. At the Mid-Atlantic Congress, there's an opportunity for bishops to come and learn about management and leadership. This is the right track to take. We're doing something similar in Eastern Africa right now through the Bishops' Conference by working with the University of Notre Dame to offer leadership courses for Church personnel. We've already trained about 60 bishops in the same kind of thing, and now we're reaching out to vicar-generals and then taking it to the next level.

I would say that's not the pastor's job. If we're co-responsible then maybe that's my job or your job. I'm happy if the pastor mentions giving, we're halfway to home. He's the gatekeeper, so if he'll let it happen, somebody else can talk about it.

Put it in the bulletin. Most people don't have to hear too much and they'll give. They just have to be prepared for it.

Tom Healey

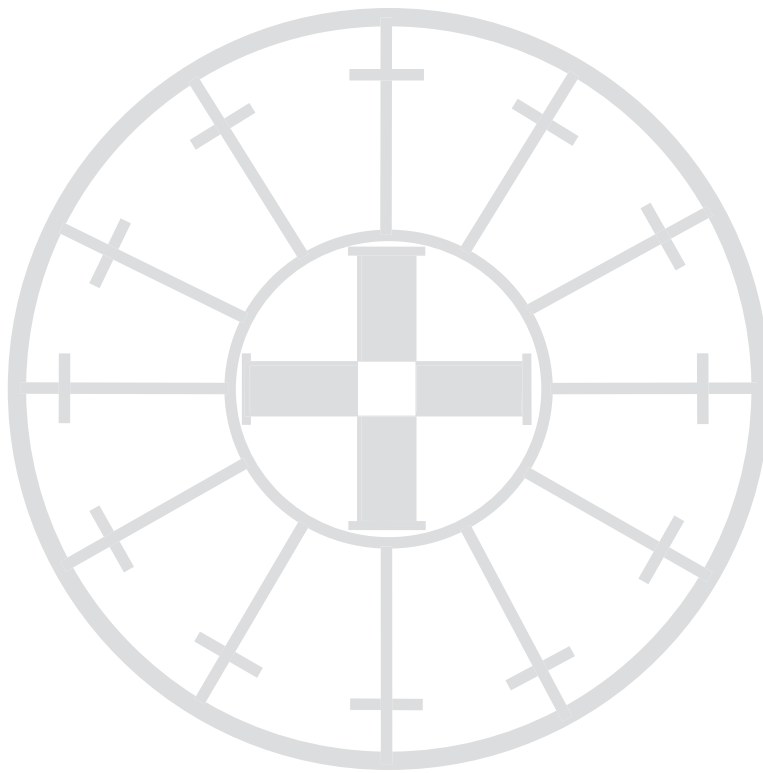
When we start seeking funds, almost none of us like asking, and we tell our pastors that. I have to convince myself that what I'm asking for is so worthwhile. If you don't ask too often, you're approaching somebody who in many ways, is already convinced. You're asking them to participate in something they have already said yes to. Now it's a question of how much, not if. Asking should be quick, thoughtful, and not done too often.

Geoff Boisi

*Founding Chair,
The Leadership Roundtable*

Fr. Jack Wall of Catholic Extension has done this at the parish and national level better than anybody else. He articulates the mission specifically and describes how it gets back to evangelization issue consistently. He breaks it down so you understand the function of where that money is going to and how it's going to impact the mission. People are investing in the mission and they're investing in him because they have confidence in his abilities. He personifies what people like about the Church.

Individuals who are successful at this have surrounded themselves with competent people who are going to use and invest that money in an intelligent way, and then transparency comes in terms of results.



THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

2013 LEADERSHIP ROUNDTABLE BEST PRACTICES AWARDS

Honoring The Sobrato Family Foundation
and CSJ Ministries

B.J. Cassin

*President, Cassin Education Initiative
Foundation and Trustee,
The Leadership Roundtable*

John Sobrato is a leading supporter of the new Cristo Rey High School that will be opening in 2014 here in San Jose. I've worked with John on that project, and he brings a businessman's thoughts to everything that goes into starting these schools. Because of your commitment

to Catholic organizations and causes in northern California, it's a pleasure for me to congratulate you for the impressive work.

Geoff Boisi

*Founding Chair, The Leadership
Roundtable*

We're really honored to bestow the 2013 Leadership Roundtable Best Practices Award to the Sobrato Family Foundation. We're honoring its steadfast commitment

to Catholic organizations and causes in northern California, and the spirit of partnership that guides its work. Thank you very much, John.

John Sobrato

Thank you very much, Geoff and B.J., for your kind words. Since we founded the Sobrato Family Foundation in 1996, education has been a high priority with our board. Since our founding, we've donated about \$21 million in general operating support, program grants, and free office space to many educational nonprofits. Last year, we created a new annual fund of \$2 million, which provides direct student support during and after school, professional development for teachers, and parent and community engagement. In order to qualify for another round in future years, the grantees must show us meaningful metrics of systematic change. Even though 5,300 students are being served in 87 public schools and 322 educators have received professional development, we want to make sure that



our money is making a difference in the outcomes instead of just the number of those being served.

Among the highest-need kids, it's clear that English language learners are the most challenged. As you may know, the Silicon Valley Hispanic population is becoming the majority, and if this Valley is going to continue to thrive, we must educate that population so they can gain the skills necessary for today's workplace.

We created the SEAL program; it stands for the Sobrato Early Academic Language. Our program starts with dual language instruction when a child is three years old and is enrolled in a preschool. Our goal is to have that child be academically literate by the time he or she is in the third grade. Early intervention by developing the home language with English, together with high levels of bilingual literacy, provides the student with a huge advantage. Today, SEAL is working in 48 classrooms, serving 1,300 children, and supported by 172 teachers. Furthermore, we engage about 480 parents to reinforce the SEAL program and enforce each adult to read to their children daily. It is proven that SEAL works, so much so that SEAL is being expanded in the Redwood City school district, as well as in Santa Clara city school district, Oak Grove district, and the San Lorenzo district. To date, we've spent about \$5 million on pilot programs in Redwood City and San Jose schools, but it's very satisfying to know that these districts I've mentioned will be paying for the majority of the cost to expand next year into 10 additional public schools, reaching 7,500 more students.

Our latest educational endeavor is a \$2 million matching grant for the Diocese of San Jose to kickstart the St. Katherine-Drexel school initiative, whereby

governance of the parochial schools will move from the parish priests to the diocese to encourage more collaboration and efficiencies. Seven of the diocese's highest-need schools in the predominantly low-income parishes will compose the first cohort this fall. Key to this twenty-first century initiative will be a blended learning model, where online learning technology is employed in the classrooms with real-time assessment, so teachers can direct their instruction to different competency groups, and thereby encourage individual learning. Since this method of instruction is emerging, with many software choices where some work and some don't, the School of Education at Santa Clara University is creating a blended learning activity. More than 100 teachers and administrators will participate for a year of development, starting off with a two-week program that is going on right now.

Lastly, B.J. and I are co-chairs of the board of directors of the Cristo Rey High School being formed here in San Jose. Cristo Rey students go to class four days a week, and one day a week work at white-collar, entry-level jobs. The various companies that hire teams comprised of about four of our kids pay \$30,000 a year, which covers 60 percent of the cost of educating the kids. Nationwide, only about 58 percent of Latinos graduate from high school. And even worse, 44 percent of those dropouts are unemployed by the age of 24. Nationwide, approximately 95 percent of the 27 Cristo Rey School graduates go on to college, which is a phenomenal statistic.

Our goal is to have 500 students by the fourth year, commencing with 125 freshmen in the fall of 2014. Fr. Peter Pabst of the Society of Jesus, the current president of the Sacred Heart Nativity School here in San Jose, has agreed to be

our president in San Jose. This is a huge risk for Fr. Peter. He's got an established school that's been open for 10 years that's been very successful, and asking him to move to a new start up, that takes guts. Thank you, Father. There are 27 Cristo Rey schools across the United States, and it's time we had one in San Jose.

In conclusion, I'd like my wife of 53 years, Sue, to please stand up. Sue and I would both like to thank the Leadership Roundtable for this award this evening.

Kerry Robinson
Executive Director,
The Leadership Roundtable

How blessed our Church is by such generous philanthropy. I applaud you and thank you so much for your witness. The Leadership Roundtable has long appreciated the role that philanthropy has played in advancing the mission of the Church. We have also long valued the role that religious women have played in advancing the mission of the Church. To present our next award, I would like to call my colleague, Peter Denio, forward. Peter is the director of the Standards for Excellence program for the National Leadership Roundtable on Church Management.

Peter Denio
Project Manager,
Catholic Standards for Excellence

I feel so privileged to be able to stand here today and introduce you to CSJ Ministries, which is an arm of the Congregation of St. Joseph, those wonderful women who hold dear the characteristics of best practices. We're able to work with them with on Catholic Standards for Excellence. I, along with many others, have had the great opportunity to observe some of the phenomenal work that they do.



Sr. Lucy Silvio

Board of Directors, CSJ Ministries

We are very grateful and honored. Seven congregations of Sisters of St. Joseph came together in 2007 to form one congregation. Faithful to our original mission, the new Congregation of St. Joseph draws its membership—over 600 religious women and over 500 lay associates—from seven formerly autonomous Congregations of Sisters of St. Joseph.

CSJ Ministries was created to support nearly 30 different ministries that provide services to those who are underprivileged and women who suffer from violence at home. They have wellness and spirituality centers, development programs for young children and families that can't afford the childcare they need to support them and their family life, food pantries, and more.

CSJ Ministries is directed by Sr. Janet Fleischhacker and Bill Gress, who support these ministries by providing assistance, supporting their governance efforts, helping them with their programs, and supporting their visions. It's great for the Congregation of St. Joseph to support them by dedicating the services of these two individuals to support the ministries. I'd like to point out four things that we found very significant that they are doing that have been so helpful to these ministries that help so many.

One is vision. The Congregation of St. Joseph had the vision to be able to look at their charism and see that carried into their ministries—perhaps even beyond their own community—and to establish that charism in these various ministries. Second is collaboration, which is the theme of our time here together these few days. CSJ Ministries truly partners with the directors of the different

ministries and allows them to make responsible decision themselves. There is great trust and care between CSJ Ministries and the directors so that they can work together with good governance and effective management to achieve the missions of their organizations.

There are also best practices. Before we got there, CSJ Ministries was working to put in place impact assessments of their ministries, encouraging strategic plans for the ministries that they are a part of, and assisting them with their governance issues. Over time, I've been able to listen to them make the hard decisions about when it's not possible to sustain the ministry and the decisions they need to make to close a ministry or find a different way to create that ministry opportunity, which is very impressive.

Geoff Boisi

On behalf of the Leadership Roundtable, we are delighted to present the 2013 Best Practices Award to CSJ Ministries, honoring its innovative, proactive, and collaborative approach to affirm, strengthen, and support over two dozen ministries that live out the charism of the Congregation of St. Joseph, and recognizing its commitment to good governance and co-responsibility. Congratulations.

We all trace our roots back 357 years to our foundation in France in 1650. The founding congregations looked toward the future with vision and creativity similar to that of their beginnings. After the re-founding, after the French Revolution, the sisters came to the United States and to many other parts of the world—we are all over the world now—and we certainly believe that part of the reason that our mission has continued to spread is because it's one that our world so desperately needs. Our mission, the mission of the sisters and of all of our ministries, is active unifying love that all may be one, and that is, of course, a response to the gospel prayer of Jesus.

From the beginning of our reconfiguration journey, the goal of our coming together has been the shared stewardship of our Sisters of St. Joseph. Read the signs of the times: we see critical needs, and we see needs for new models and examples of groups and institutions coming together in new configurations and unions for the sake of the Gospel, for the common good of the people of God.

In 2007, when these congregations came together, each of the seven founding congregations had between three and seven sponsored ministries. At that time,

they had been operated by the local congregations. So, suddenly overnight, we had almost 40 ministries that were spread across a large section of the United States, as well as in Japan and other parts of the world. The congregational leadership could not oversee all of these sponsored ministries or exercise the responsibility that the seven founding congregations had done. We felt we needed a new design to support, oversee, and attend to these sponsored ministries. As a result, CSJ Ministries was born.

Bill Gress

Associate Director, CSJ Ministries

CSJ Ministries is separately incorporated as the sponsorship arm of the Congregation of St. Joseph. We provide oversight and support on behalf of the Congregation to the sponsored ministries. Our board of directors is composed of members of the Congregation and the Congregation leadership team, sisters and lay persons with a broad range of professional experience. Our executive director is a sister of St. Joseph.

Our 28 sponsored ministries are quite diverse. There are six spirituality centers, three high school academies, two housings for seniors, two granting foundations, transitional housing for survivors of domestic violence, ministry of the arts, an adoption agency, and ministries that specialize in serving children, young mothers, seniors, immigrants, and the poor. They are in seven states in ten different dioceses in 13 cities or towns.

A few of the ministries are led by a sister. Some Sisters of St. Joseph work in the ministry, and some serve on boards, but the vast majority of the board members

are lay persons, so those responsible for the ministries are lay persons and sisters together. CSJ Ministries' role is to steward and guide the sponsored ministries in their desire for excellence in mission, operations, and governance. This is where our contact with the Leadership Roundtable is so valuable. We have been encouraging and resourcing the leaders and the boards to do strategic planning, financial planning, measuring outcomes, increasing the diversity on their boards and staff, etc. But your Standards for Excellence for Catholic nonprofits hold up a nationally recognized, third party comprehensive yet concise set of principles for effective and efficient organizations. They—and we—have found your Standards of Excellence very helpful.

Several of our ministries are working intentionally to improve their governance and operations by board and staff committees studying and implementing the Standards for Excellence with the goal of applying for the Seal of Excellence. They have expressed appreciation for your Partners in Excellence program, for the extensive resource packets that you have published, and for the personal assistance of Peter Denio. As an aside, CSJ Ministries, as an organization, is newer than all but one of our sponsored ministries. So as a relatively new organization, and as a model to the ministries, we formed a committee of our board members, the executive director and myself, and systematically used your Standards for Excellence and resource packets to put into place board-approved policies and procedures that we had not yet instituted. As a result of this work, our board at their meeting this month passed a resolution that we apply for the Seal of Excellence.

So, on behalf of CSJ Ministries, the Congregation of St. Joseph, and our sponsored ministries, Sr. Lucy and I are pleased to accept this award and its recognition, but we are more grateful for all the resources and services of the Leadership Roundtable that make our work so much easier. Thank you.

THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

PRAYER ON DAY 2



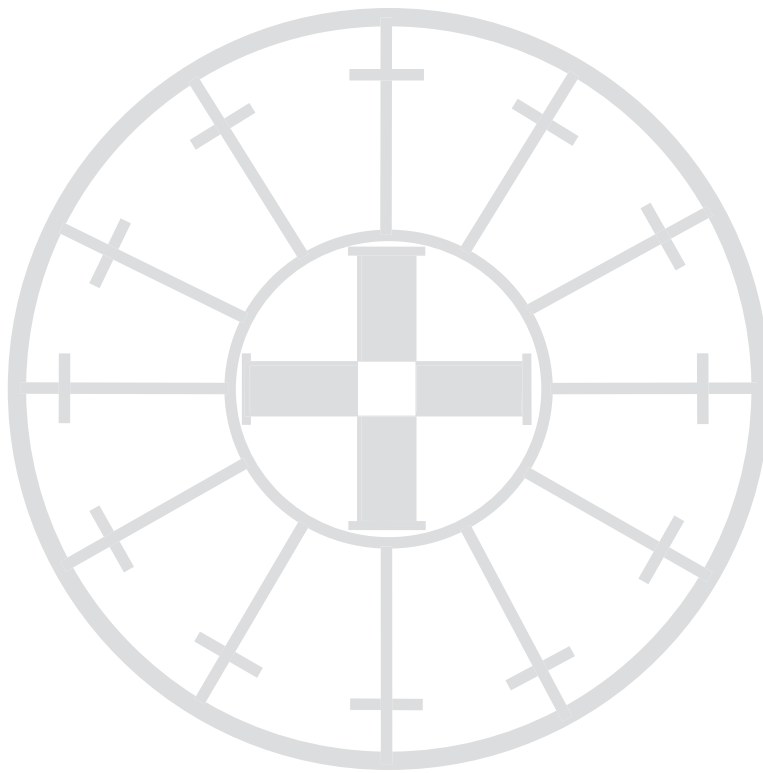
Darla Romfo

Trustee, The Leadership Roundtable

In the name of the Father, the Son, and the Holy Spirit. Dear Lord, we place ourselves in your presence and ask that our thoughts and our actions throughout every hour of this day be guided by your Holy Spirit. We thank you for giving us the Church and the Eucharist and for your promise that the gates of hell would never prevail against her. Please guide the work of the Leadership Roundtable as we seek to strengthen the Church through a deeper and richer understanding of the co-responsibility between the laity and the clergy.

Please give us the faith to trust in your promises, given to us in the holy scriptures and illuminated through your Church. May everything we do be animated by an ever-deepening love for you. We ask this all in Jesus' name and pray as you taught us.

Our Father who art in heaven, hallowed be thy name. Thy kingdom come, thy will be done, on Earth as it is in heaven. Give us this day our daily bread, and forgive us our trespasses, as we forgive those who trespass against us. Lead us not into temptation, but deliver us from evil. Amen.



THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

POPE FRANCIS AND REFORMING THE VATICAN

Rev. Thomas Reese, SJ

Columnist, National Catholic Reporter and former editor-in-chief, America



Fr. Tom Reese

I've been asked to talk about the impossible topic of reforming the Vatican. It's a very interesting topic because this is an institution that's been around for a long time. So as a social scientist and as a priest and theologian, it's a fascinating topic to explore.

This was one of the issues the cardinals discussed prior to the conclave. Everybody was talking about reforming the Vatican curia, and a lot of the discussion focused on various Vatican scandals, including the theft and leaking

of documents from the Pope's apartment, financial corruption, sexual misconduct, and internal bickering among the various cardinals in the curia. There were also calls for efficiency and better management.

Since Vatican II, there has been extensive discussion about reforming the curia, but nothing ever happened. The lack of progress in reform is due to institutional inertia, disagreements over what reform means, and fears that reform can lead to changes in power relationships. Does that sound familiar to any organization you've ever been involved in? This is not unique to the Catholic Church. There are, however, some barriers to reform that the Church faces in addition to what would be in any other institution.

First of all, they have the problem that their leadership has absolutely no training in management. They learn administration by working in Church bureaucracies and by watching others. So they learn both the mistakes and the good things from

others. As far as I know, not one cardinal has an MBA. The conservative theological training of these men makes them fearful that some of these reforms would actually undermine the very character of the Church.

I'm going to focus on what we mean by reforming the Vatican. I would distinguish between two types of reform: better management and comprehensive reform. Many of the recent scandals in the curia are simple management problems that can be dealt with by following best practices of business and government. In other words, this is not rocket science, nor is it theology. It is simply the application of good management practices that government and corporations have used.

For example, they have dealt with financial corruption for centuries. The solutions involve things like proper accounting systems, rules about conflicts of interest, competitive bidding, transparency in finances, and internal and external auditors. But part of the problem is

cultural. The Vatican is in Italy, where financial corruption is not uncommon, and who you know is often more important than what you know and what you can do. And part of the problem is that the leadership team – cardinals, bishops and priests – have no understanding or training in financial management. They have to depend on others. But the problem also results from the arrogance of thinking that the Church is somehow so different that it cannot learn from government or business practices.

On the other hand, some actions have been taken in terms of financial management. Early in his papacy, John Paul II removed the Italians from all leadership positions dealing with finances in the Vatican, and brought in Cardinal Edmund Szoka to modernize and computerize the Vatican accounting system. One of the reasons Cardinal Szoka was so successful was that he didn't really care what the other people in the curia thought of him, whether they liked him or not. But once Cardinal Szoka left, there was a lot of backsliding. Detailed financial reports were no longer issued. Systems can be put into place, but it takes people to make them work properly.

By the end of John Paul's papacy, the Italians were once again in charge of all the financial offices. In 2011, Pope Benedict took a huge step in financial reform by insisting that the Vatican follow the standards set by the international agency Moneyval. Although he could probably not balance his own checkbook – if he even had a checkbook—Benedict realized that the Vatican would not reform itself unless it was held accountable by outsiders. In the past, the Vatican always argued that it was unique and could not be judged by anybody else's standards. But Benedict insisted that the Vatican get on Moneyval's white list of good

countries, which means that it had to observe the international standards set up by Moneyval. His decision means that every year, outsiders will check up on what the Vatican is doing and give a public report. It is in the Vatican city-state and in the Vatican bank where financial reform makes most sense. These are entities that have secular counterparts, museums, stores, office buildings, post offices, security forces, etc., for which best practices are easily available in managing contracts, purchases, and other financial transactions. There is no excuse for not following best practices when it comes to financial administration in the Vatican. It is in this area that the business community can be most helpful in reform.

A second area of scandal was alleged sexual impropriety. There was a lot of talk about a gay lobby in the Vatican. Well, if there is a gay lobby in the Vatican pushing a gay agenda, it is the most unsuccessful lobby in the history of the world! Sexual impropriety occurs not just in the Catholic Church, but in governments, businesses and militaries. That is why there are rules against sexual harassment, sex between employees and supervisors, and against advancement in exchange for sexual favors. Sexual impropriety can also lead to blackmail. My personal opinion is that a lot of these leaks are a result of journalists blackmailing. The journalists are all writing about how these Vatican officials are subject to blackmail. Well, who do you think is blackmailing them? I think it's the journalists that get all this leaked information. In any case, this is another area where business and government have some experience. And again, rules are not enough. There have to be compliance officers investigating allegations and enforcing rules. And if these offenses are job related, the Vatican should treat them as causes for termination, not simply as sins.

What we are talking about here is human resource management. The Vatican is a human resource nightmare for a few reasons.

First, the Vatican follows Italian labor practices, which means it's almost impossible to fire anyone. Thousands of people want jobs in the Vatican, and no one ever quits. It's a great job. The current economic crisis is forcing Italians to reexamine their labor practices and, hopefully, this might help the Vatican. The Vatican needs HR expertise. When I wrote my book on the Vatican, the HR officer was a nice young Dominican with a degree in canon law and absolutely no training in human resource management.

Second, many of the Vatican employees are clerics. In theory, they can be fired by sending them back to their dioceses. But in reality, they often have cardinal patrons whom no one wants to cross. The sexual abuse crisis showed how poorly the Church deals with HR when it comes to clerics. Pope Francis' attacks on clericalism and careerism should help here, but human resource management is another place where the business community can help the Vatican.

Third, there were also complaints about petty infighting in the curia. I'm not one who thinks that everyone in the Vatican should think with one mind. It is useful for an executive to have subordinates who argue with each other so that he gets a variety of advice. Frankly, one of the problems with the papacies of John Paul II and Benedict was their unwillingness to listen to a variety of voices. But when the fighting is about power and prestige, it becomes dysfunction, and a strong hand is needed to get people back in line. Archbishop Giovanni Benelli played this role in the papacy of Pope Paul VI, where

he was the *sustituto*, a position similar to that of the White House Chief of Staff. He was Paul VI's alderman. Cardinals trembled in his presence and he got things done and kept people on message. Subsequent *sustitutos* did not play as strong a role as Benelli because the *sustitutos* did not want to make enemies among the cardinals. Many felt that Benelli never became pope because he made so many enemies in the College of Cardinals while he was *sustituto*.

The other key position for coordinating the curia is the secretary of state, a position more like a prime minister than the US secretary of state. In the papacy of Benedict, problems arose because of his appointment of Cardinal Bertone as secretary of state. Benedict appointed Cardinal Bertone as secretary of state because he was comfortable with him and because Bertone was loyal to the pope. Bertone did not come from the ranks of the Vatican diplomatic corps like most of his predecessors. The fact that he was an outsider and promoted his own protégés over the old-timers caused a lot of ill will in the secretariat of state. Especially among these Vatican officials, who considered him the most incompetent secretary of state that the Church has had in recent history. And many commentators note, of course, that most of the Vatican leaks put Bertone in a very bad light.

The fourth management issue is overlapping and confusing jurisdictions among Vatican offices. The division of responsibility among various Vatican congregations is incredibly complex and if you want to read more about it, go to chapter five of my book, *Inside the Vatican*. Some of the responsibilities, for example, are divided by churches: the Eastern churches, the Latin missionary churches, and the Latin non-missionary

churches. So you've got a bunch of congregations and offices that deal with those, and other offices that deal with issues like ecumenism, interreligious dialogue, doctrine, and liturgy. Then there are some offices that are divided by the people that are affected, bishops, clergy, religious, laity, even health workers. This means you've got all sorts of overlapping jurisdiction that demands coordination, which does not always happen.

The other problem is that often, the issues assigned to a particular dicastery have more to do with history than any theoretical scheme. For example, the Congregation for the Clergy was actually founded back in 1564 under the name of the Congregation for the Council, not the Vatican Council, but the Council of Trent. And what were the major reforms that came out of the Council of Trent? They had to do with clergy, seminaries, catechetics, and Church finances. Those issues are still dealt with by the Congregation for Clergy. Meanwhile, it doesn't deal with sexual abuse by clergy, because the only person in the Vatican that they could find that would deal with this in a serious way was Cardinal Ratzinger over in the Congregation for the Doctrine of the Faith. I mean, what does sexual abuse have to do with doctrine? Nothing.

The last example is relations with Jews, which is dealt with by the Council for Promotion of Christian Unity, of course. Why is this? It's because the Jews had a personal relationship with Cardinal Bea during the Second Vatican Council when he was the head of the secretariat for Christian unity. When the Council for Interreligious Dialogue was created, they thought, "Well obviously this is where the Jews should be. They're not Christians, so we'll move them over there." The Jews said, "No way, we like it and we've got a

relationship here." So, do you alienate the Jews for organizational purity? Of course not. So they're still dealt with in the Council for Christian Unity. So this is the kind of problems you have to deal with in management and where the organizational boxes are on the chart.

But when you get to comprehensive reform, what is involved there? Everyone in the Church seems to be in favor of reform. Even members of the Roman Curia will say, "I'm for reforming the curia." But what does that mean? To a curial cardinal, that means he gets more power but the guy down the hall who keeps fighting with him gets less power. That's what reform of the curia means in the Vatican!

For conservatives, reform means having a stronger curia that speaks with one voice in imposing the Vatican's vision on the rest of the Church. That's what reform of the curia means. For moderates, reform means decentralization of power and more collegiality in the Church. For liberals, it means more democracy in the Church. So what does reform mean? You can't reform the curia until you have a better idea of what the role of the curia is in the Church.

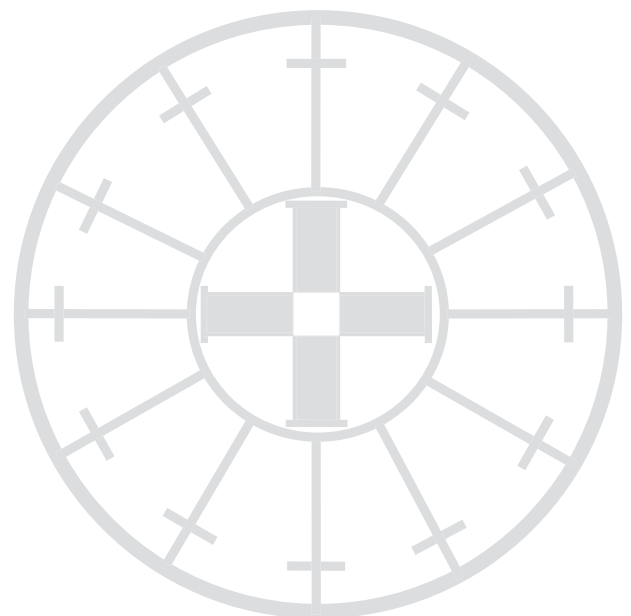
For example, many people talk about making the curia more efficient. How can you be against efficiency? But efficiency for what? I'm all in favor of having the Congregation for Doctrine of the Faith be more efficient in dealing with abusive priests, but the last thing I want is an efficient inquisition going after theologians and nuns. No thanks, give me inefficiency! I fear the day when the Vatican begins data mining the Web searching for heretics, just like the US government searches for terrorists. Bringing technology to the Vatican—do you really want this? *[Laughter]* Such efficiency we do not need.

My own prescription for reforming the curia is based on the supposition that it should be in service to the pope as head of the College of Bishops. It should be organized as a civil service, and not as part of the hierarchy of the Church. Thus, my reform would start with not making members of the curia bishops or cardinals. The current curia is organized like the royal courts of the seventeenth century, where princes and nobles helped the king run the nation. This governance is antiquated and dysfunctional. It breeds careerism in the Church. A Vatican that acts more like a civil service and less like a court would be more respectful of local hierarchies. It would also allow the pope to more easily remove and replace incompetent officials. Incompetent nobles and princes cannot be fired, they can only be poisoned, and we don't do that anymore! *[Laughter]*

Second, the Vatican operates like the absolute monarchies of the seventeenth century where the monarch held all the legislative, executive, and judicial powers. Modern governments recognize the need for a separation of powers. Agencies like the Congregation for the Doctrine of the Faith should not make the rules and then act as police, prosecutor, judge, jury, and executioner. When they are dealing with theologians and nuns, this is not due process in any modern sense of the term. And the role of the synod of bishops also needs to be strengthened to provide input on policy from the college of bishops. The synod should have standing committees to make recommendations on policy and to exercise oversight of the offices in the curia. No political theory today would leave everything to the executive without a role for a legislature or an independent judiciary.

Now, some would argue that this would be importing secular political models into the Church governance. Such comments ignore the history of the papacy, which is replete with examples of popes learning from secular governments and organizations. Church tradition does not forbid learning from secular counterparts. Church tradition demands it, and I have a whole section in my book, *Inside the Vatican*, recounting some of this history.

So, better management is needed in the curia and is certainly possible. Comprehensive reform, however, will be a real challenge. It will take someone with the simplicity of Saint Francis and the organizational skills of Saint Ignatius. Pope Francis' concerns about clericalism and careerism in the Church give me hope that reform is possible, but the obstacles to reform do not make me optimistic.



SELECTED QUESTIONS, ANSWERS, AND COMMENTS

Betty Anne Donnelly
Trustee, The Donnelly Foundation

You are the voice of such wisdom on this, and you have thought systematically through it and we see as a sign of hope that Francis has appointed the group of eight international cardinals to advise him. Have you spoken with any of them, or do you hope to impart some wisdom to Cardinal Rodriguez Maradiaga, the secretary of the group?

Tom Reese

Nothing has come through yet. I wrote an article in *Commonweal* that was translated into German, Italian, Spanish, and some other languages in the hopes that it might be helpful to them. We're just going to have to see. The great advantage to this particular group, as opposed to all the other reform commissions that the Vatican has had, is that practically all of these people are from outside Rome. No matter how conservative you are as a bishop or a cardinal in a diocese, you still want to be king in your diocese. You don't want some bureaucrat in Rome overruling what you're doing and telling you how you're supposed to run your diocese. No matter how liberal or conservative they are, there will be an impetus for decentralization and for greater collegiality. Now, whether they can pull that off or not, we're just going to have to wait and see.

But if all they do is move boxes around in the organization chart and say, Well, this office should really deal with this and that, that's a joke. It's hardly worth the trouble. Can they get outside of their mindset

and have a different vision of the Church and how the Vatican curia works within that vision, that ecclesiology? That's the question and that's going to take a new vision for them. We'll see.

Rev. Nathan Castle, OP
*Director, Catholic Community
at Stanford University*

One of the bishops I served has described the *ad limina* visit process, and he said that they had spent five years preparing all kinds of documentation and demographics and statistics. When he and his team got to Rome, to meet with Pope John Paul II, he was given only five minutes. And the bishop said that, in midsentence, people burst in, had him stand next to the pope, took his picture, and ushered him out of the room. That was the whole process. Yesterday, someone mentioned the problem of the pope having a thousand people directly reporting to him. One issue that bothers me is that when Catholic people have a grievance against their bishop, there's nobody to go to. There's not even a next level; they sort of assume that there's some next level of management where one can legitimately bring a grievance about a poorly performing bishop. Is there any chance of that changing?

Tom Reese

In the earlier part of John Paul II's career, the bishops probably had 15 minutes each with him, and the first time they went in they spent most of the time trying to find the diocese on this big map that the pope would have. The pope would have a series

of questions he would ask, and one year it was, "How do you get along with the nuns in your diocese?" This was when the nuns were under their first attack, during the papacy of John Paul II, and basically he wanted all the dirt on the problems with the nuns. This one bishop laughed and said, "You know, you really ought to ask the nuns in my diocese that question." That was not what the pope wanted to hear; that was a rather brave bishop. Most of them said, "Oh, it's how wonderful you are, Holy Father."

When they went to the Vatican congregations it was just as bad, if not worse. Usually, they would go in groups and they'd meet with the prefect of a congregation for about an hour. The prefect would speak for 55 minutes, lecturing them. When that ended, the prefect would say, "Oh, this has been a wonderful dialogue that we've had." It was pretty awful.

The one exception was actually Cardinal Ratzinger at the Congregation for the Doctrine of the Faith. When they would come in he'd say, "Well, these are three issues, what do you think about these? Let's talk about these." Now the more cynical felt that he then took notes and people who'd said the wrong things did not get promoted to be archbishops. But at least he was listening to them, and this was one of the reasons he was elected pope, because he actually listened to other people, as opposed to all the other prefects who just preached. All in all, it's not a very good system.

In terms of appealing, that's a very good question. In the old days, the fifth century, if you had a problem with your bishop, you went to the regional group of bishops, a council of bishops, and you'd work things out there. Councils of bishops could even judge other bishops, so there was a local or regional kind of relationship. You would only go to Rome when they couldn't get an agreement or when there were disagreements among various regional councils. There was this lower level.

There are very complex canonical procedures for appealing things like the closing of parishes, etc. These go to the Congregation for Clergy to decide. But on these things, the Vatican will never get into a question of substance. It will only be, "Did the bishop follow the proper canonical procedures?" One time, Cardinal Bernardin got in trouble for closing a parish. His wrists were slapped and he was told he couldn't do it because he did not follow proper canonical procedures. But what that really means is that it's just been delayed, because if the bishop goes back and follows all the proper canonical procedures, he can do what he wants.

We are not good at dealing with this and don't know how to deal with this because our theology says the bishop is the vicar of Christ in his diocese. When we don't like what the bishop does, we go to Rome and have them tell him to change. But on the other hand, we don't like Rome telling the bishops what to do all the time.

It's the old issue of subsidiarity, of what's regional or local, what decision should be made at what level in the Church. This is a complex problem with lots of prudential judgments that have to be made and we need to have a bigger discussion in the Church on how to do that.

Chris Lowney

Author, Heroic Leadership and Pope Francis: Why He Leads the Way He Leads

To a newspaper reader around the time of the conclave, there's been this drumbeat of suggestions that Vatican doesn't work. So the implication could be that the problem is really in headquarters and we got it figured out in the field. My perception would be that the real issues are in the field, in terms of how many people are reached and served. What do you imagine is the mentality of a lot of these guys? Do they have the idea that those guys at headquarters are the ones who are the problem and we have it under control out here?

Tom Reese

I think it's all over the place. Someone like George Weigel talks about reforming the Vatican. George is a lay intellectual conservative. For him, that means shutting up the Council for Justice and Peace. They shouldn't be talking about economic justice and the IMF and all of these things. On the other hand, more liberal people would say, Look at this English translation of the liturgy, which is an absolute disaster. You have a German speaking cardinal and pope deciding how English speaking people should speak English. This is nuts! *[Laughter]*

You've got criticism from both sides, motivated by whether they agree or disagree with the policies. It's quite ironic that most liberal Catholics who are politically liberal want more power to Washington in the central government, but at the same time they want decentralization in the Catholic Church. Conservatives are exactly the opposite. A lot of these judgments are based on, If

I were pope I would want total power, I would want to be an absolute monarch so I can impose my views on everybody. So we have to be self-critical in understanding if we're mad because we're not getting our way, or if we're mad because the system is dysfunctional. That's part of what goes on here. As many cardinals as you have, you would have as many views on how the curia should be reformed.

Geoff Boisi

Founding Chair, The Leadership Roundtable

Given the fact that we now have a pope who is a Jesuit, which is a first, what have been some of the most effective ways of getting things done positively within a Jesuit mindset? Who are the axis communicators, how should this group be thinking about developing a strategy for influencing some of these temporal matters that we're talking about?

Tom Reese

I think a key part of the Jesuit decision-making process is a wide consultation before a decision is made. The fact that the local superior is listening and meeting with the people and listening to them and know where they're coming from and what's going on before a decision is made is extremely important in the Church.

It's interesting that Cardinal Bergoglio, when he was archbishop in Buenos Aires, never had a number two guy that everything went through. He got on the phone and just called people and said, "What do you think about this?" Other people didn't know all of the people he was calling. He actively went out and sought information. My understanding is that he's on the phone about once a week to Cardinal O'Malley in Boston.

This is the kind of executive that he is. It's going to be interesting to see because he seemed to be willing in Buenos Aires to appoint people who disagreed with him to positions, and he appointed people who were competent in an area and then delegated to them the work that they were doing. He had to operate that way.

The key thing will be good judgment about people. The Jesuits have been very lucky in that, in terms of whom we have had as leaders in our general superiors and who have been appointed as leaders and provincials around the world. We've had some lemons, but we've been pretty lucky, especially in comparison with what you see as bishops. So maybe that's some direction in terms of how he could go.

The key thing will be how good his judgment is of people and how he makes these decisions about appointment of bishops. For example, this recent brouhaha about him not attending this concert in Rome, they had the picture of the empty chair at this Beethoven concert that he didn't attend, and all the people there felt like they got stood up. The reason was the *nuncios*, the papal representatives from all over the world, were in Rome for a two-day conference. These are his key people, and he decided it was more important for him to spend some time sitting down and talking with these *nuncios* and telling them what kind of bishops he wants them to recommend from around the world than it was for him to go listen to Beethoven. And I think that's pretty good judgment on how to use your time properly.

Rick McCord

Consultant, The Reid Group

In thinking about comprehensive reform and the possibilities of the impact of some new thinking on the role of synods and



episcopal conferences, would some new thinking have an impact on the question of comprehensive reform within the curia?

Tom Reese

I think the synods are absolutely essential. But just calling people around for once a month meetings and then sending them home just doesn't work. Legislatures don't work well unless they have an ongoing committee system. That's why the US Congress is one of the most powerful legislatures in the world. It's because of its use of committee systems to examine issues and to exercise oversight over government agencies.

Now, in addition, nobody in the curia should be a member in the synod. Just as there should not be bishops and cardinals, they should not be members of the synod. They can attend as staff to the synod, but the synod should simply represent the bishops from all over the world and not have cardinals and bishops from the Vatican curia who are telling everybody else what to think and what to do. I think there's a lot of work that has to be done in terms of the synod to make it functional.

Then there's the role of the conference of bishops. This is the classic problem of subsidiarity: at what level should decisions be made in the Church? What good are they? I think the role of the bishop's

conference has to be really strengthened so that they can make pastoral judgments in their regions. Even ultimately making pastoral judgments about whether we have married priests or not in their regions, this is a question of law, not doctrine. Why can't they make this kind of decision? I think Francis may be open to that. There are indications in some of his writings on that.

Rev. Brendan McGuire

Vicar General, Diocese of San Jose

The current process of selection of bishops is an opaque reality for most. We don't know or understand or even have an idea of those who are currently on the selection committee or appointment committee. They are still known as the kingmakers. How does the process need to change and what influence can Pope Francis have on that?

Tom Reese

I've written extensively on the appointment of bishops. It's a fascinating topic because if you look historically the way we would do it right now, is a modern innovation of having the pope appoint all the bishops in the world. This is a modern innovation in the Church. Think about it, how did they choose bishops in the first couple of centuries? The bishop died, the people gathered together in the cathedral, and said, "Who's going to be our bishop? Oh, you know he's a good father and he's bright and he's a nice guy. He prays a lot, he's holy, he understands the scripture. Let's make him a bishop. Yay! Okay. He's bishop."

Now that worked fine when you had consensus in the community on who ought to be bishop. But when you start having, "Well no, I think he ought to be bishop," you think the Shiites and the

Sunnis go after each other. You should have seen the riots in Rome over who would be the bishop of Rome! There was one point where the Christians were killing each other fighting over who would be the bishop of Rome and the pagan Roman soldiers had to come and break up the fights among the Christians in Rome. They took religion very seriously.

So as things evolved, they decided the system's not working out so well. "Why don't we get the priests to go into the cathedral, work it out. They know the priests better, who to choose, let them pick somebody." This became the system where a chapter or a synod of bishops would actually elect the bishop.

Sometimes that worked, sometimes that didn't. The ideal system, according to Pope Leo I, was that you could only have a legitimate bishop if he was elected by the priests, accepted by the people, and consecrated by the bishops of the surrounding region. This is a checks and balances system that the writers of the *Federalist Papers* would dance for joy about. This is perfect. So what would happen is the priests would gather in the cathedral, they'd elect somebody, they'd bring him out to the front door of the cathedral, present him to the people, and if the people cheered, he was the bishop. If the people started throwing tomatoes, uh-oh, we've got to go back and pick somebody else. The only place where that currently happens in the world today is Rome. The College of Cardinals is the virtual pretend College of Priests of the Diocese of Rome. They elect the Pope, they bring him out to the balcony, he says *bona sera* and they all cheer.

The third thing for Pope Leo was that a bishop has to be accepted into the college of bishops by the bishops of the surrounding region. Well, this is a very ancient and traditional way of choosing bishops. We could go back to that process or have something like it. In the oriental tradition, the synod of bishops would be the group that would nominate bishops.

So there's lots of ways, there's no divinely defined way of selecting bishops or why we got to the point where we are today. The reason we got to that point was the priests would be gathered in the cathedral chapter to elect a bishop and the doors would be broken down, the local noble would come in with his knights with swords and say, "I've got this bastard son who needs a job. Elect him bishop, and if you don't we are going to beat the crap out of you." So they elect him bishop. So what kind of freedom did they have when you had the political interference in the appointment of bishops because once the Church became rich, the power elite wanted access to the money and jobs.

So the reformers said, "We've got to stop this. This is disastrous." This is why we had the Reformation, because we had such terrible bishops. The Church had lost control of the appointment of bishops. So what do we do? Let's have the pope involved, let's have him appoint bishops because he's got his own army, he can protect himself from any interference from these people, and he will have the best interests of the Church at heart in the appointment of bishops, whereas the local kings and nobles don't. All they're after is money, power, and influence. So the reformers were the ones who said, Let's take it to Rome.

The French Revolution comes along and we no longer have Catholic monarchs and nobles interfering in the appointment of bishops, but the power and the appointment was all centralized in Rome. At one time, the king of Spain had control over the appointment of bishops in all of Latin America. This was the price we paid for free passage for missionaries on Spanish ships to Latin America. The reform took it away from the king of Spain and gave it to the pope. Well, now the question is, do we go back to the ancient tradition of allowing the clergy to elect, the people to accept, and the bishops of the surrounding region to appoint? I think it's time to start decentralizing that process.

THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

2013 ANNUAL MEETING CONCLUDING REMARKS

Lt. Gen. (Ret.) James Dubik
Chair, The Leadership Roundtable

It is my task to summarize the last day and a half. It's been exciting to listen and learn. As I look through my notes, I see a pattern of movement and action repeating over and over again. It started with [Susan King](#) describing the movement of the Leadership Roundtable from its initiation to a group that is offering substantial programs that form an integrated set that have the potential for transformational cultural change in temporal management affairs. [Chuck Geschke](#) talked about the movement from aspiration in our school system to action in the school system. [Geoff Boisi](#) described movement from the current, less stable, state of our capital base to a model of financial stability that can contribute to strengthening the Church.

The theme continued as [Chris Lowney](#) spoke about moving from a model of leadership as a small group with authority to a communal sense of active leadership.

The [ESTEEM panel](#) discussed the importance of moving toward a model of engaging and involving young Catholics, giving them the opportunity and the authority to participate now. The panel on Church finances reinforced models of action and co-responsibility. We need to move from a tactical approach of finances to a sustainable strategic model, ensuring ministries continue well beyond a year.

At Mass, Bishop Blaire continued the theme when he said, "By their fruit, by their actions, by what they do, you will know them. The test of authenticity is doing the right things, coupled with the complete trust in God." Fr. Brendan McGuire then reminded us that only together can we make Church and move from our present to our future. The movement from where the Church is, to where it ought to be. I'm proud and honored to be part of a group of leaders that take our baptismal duties seriously.

We should ask ourselves a series of

questions: What can I do in my part of the Church to encourage it to become a Partner in Excellence? How can we encourage our parishes and dioceses to use Catholic Leadership 360 in its evaluation, and encourage our priests to participate in the Toolbox for Pastoral Management or log-on to CatholicPastor.org? How can I help explain the opportunity to move the Church into a more stable financial situation? How can I open doors for the initiative and investment to better the church and to help the mission?

[Geoff Boisi](#)
*Founding Chair,
The Leadership Roundtable*

We approach the hierarchy and offer the intellectual capital, resources, and experiences that we have gathered. We ask them to tell us their issues and then we share our observations that might be applicable to helping them accomplish their goals. Cardinal O'Malley has been a supporter, friend, and honoree for us, and

he's experienced the quality of our work. I have to remind everybody that if we continually just focus on the bishops and cardinals we are missing the bigger vision. You all represent a huge portion of the Catholic community and many of the institutions and organizations that we represent have these same issues. The good news is that we are working on these things. We have to figure out how we can use our collective voice to gain the attention of the hierarchy, and more efficiently and effectively help them accomplish their goals.

We are present on the West Coast now, and we need to identify partners in other areas that are interested in working with us and bring them into the fold, enhancing the council. There is plenty of work to be done, and much of it needs to be addressed on a local basis. Help us find the axis leaders and communicators in your communities.

Identifying and including one hundred leading philanthropists in our work is just the tip of the iceberg. We need to identify the key-players across the board, because they will help us accomplish our goals. One of the reasons we honored the Sobrato Family Foundation last night at the Leadership Roundtable Best Practices Awards Banquet is because it is one of many examples of people doing really interesting things. We must contact more people and bring them into some of the strategies that we've initiated because they strengthen our organization and goals.

For those who are attending for the first time, from a regional standpoint, please help us identify other people that would be interested in any of the activities and strategies that we offer. Thank you.

Kerry Robinson

*Executive Director,
The Leadership Roundtable*

I would like to thank you all for your extraordinary participation over the last two days. I especially want to thank the speakers, presenters, and volunteers who made the Annual Meeting possible, especially the board of trustees and my extraordinary colleagues. As Geoff said, please stay involved, and identify those other leaders across the United States who can contribute, with you, to the Church and act as advocates of our mission. Finally, thank you to our local trustee hosts, Fred Gluck, BJ Cassin, Chuck Geschke, Betsy Bliss, and Kathleen McChesney. Thank you to Santa Clara University. Thank you, and safe travels.

THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

Appendix 1

2013 ANNUAL MEETING SPEAKER, PANELIST, AND PRESENTER BIOGRAPHIES

Geoffrey T. Boisi is founding chairman of the Leadership Roundtable and chairman and CEO of Roundtable Investment Partners LLC, a private investment firm with interests in various private equity, money management, real estate and corporate advisory organizations including Carleon Capital Partners LLC, a leading wealth management firm. In May 2002 Mr. Boisi retired as vice chairman of JPMorgan Chase, where he served as co-CEO of JPMorgan, the firm's investment bank, and a member of the JPMorgan Chase's executive and management committees. Prior to joining JPMorgan Chase, Mr. Boisi was founding chairman and senior partner of the Beacon Group, a premier merger and acquisition advisory and private investment firm, which was acquired by Chase in July 2000. Mr. Boisi is also co-founder of MENTOR/National Mentoring Partnership and serves on the board of many educational, charitable, and philanthropic organizations, including the Wharton School, Boston College, the Carnegie Corporation of New York, the Brookings Institution, Saint Thomas More Catholic Chapel & Center at Yale University, FADICA, and the Papal Foundation. He is a Knight of Malta and a graduate of the Wharton School and Boston College.

Michael Brough is the director of strategic engagement for the Leadership Roundtable. He works with Catholic leaders to create and implement resources that assist parishes, dioceses, and Catholic nonprofits to address the development and implementation of management structures and personnel policies and procedures that enhance the effectiveness of all those in Church ministry. Mr. Brough is also a presenter in the Leadership Roundtable's training for new pastors and a keynote presenter and workshop facilitator at national and diocesan conferences. He is certified by the Center for Creative Leadership to deliver the Catholic Leadership 360 assessment tool. Previously, Mr. Brough was executive director of RENEW International. He is an experienced presenter and teacher and worked for the Scottish bishops in the area of justice education. He has led training for Catholic lay ministers, priests, and bishops throughout the US and in 12 other countries. Mr. Brough holds degrees from St. Andrews University, Scotland, and Loyola University, New Orleans, with further qualifications in clinical and pastoral counseling and education.

Thomas Carroll is president of the Foundation for Opportunity in Education based in New York. Mr. Carroll has created a broad coalition to advocate for the passage of an Education Investment Tax Credit that would provide a dollar-for-dollar state tax credit for donations to Catholic and other K-12 scholarship organizations and public schools. He previously founded and led a network of high-performing charter schools in Albany, NY, that attained more than 30 percent market share, and he has run private scholarship initiatives in Albany and New York City. As a policy advocate, Mr. Carroll played a key role in the adoption of a 25 percent income tax-rate reduction in New York, a common core for the State University of New York, and New York's charter-school law.

BJ Cassin is founder and chairman of the Cassin Educational Initiative Foundation, launched in 2000 to establish private, college preparatory middle and high schools in economically-challenged communities throughout the country. Mr. Cassin has been a venture capitalist for nearly 30 years. He was a financial founder in a number of public companies, including Advanced Fibre Communications, Cadence Design Systems, Centex Telemanagement, Cerus Corporation, Endosonics Corporation, Equatorial Communications, Laserscope, Maxtor, Quantum Corporation, Quantum Health Resources, Racotek/Zamba, Scientific Microsystems, Stratacom, and Symphonix Devices, and the financial founder in companies sold as private companies, including CardioRhythm (Medtronic), Extricity (Peregrine Systems), Metricon (Johnson & Johnson), and Mountain Computer (Nakamichi). Mr. Cassin co-founded Xidex Corporation in 1969, which achieved Fortune 500 status in 1987 with sales of \$752 million and employing 7,000 worldwide. Mr. Cassin is a board member of the Leadership Roundtable, Cristo Rey Network, and FADICA, and he is a member of the California Jesuit Province Investment Committee. He is a graduate of the College of the Holy Cross.

Arturo Chávez is president and CEO of the Mexican American Catholic College (MACC) in San Antonio, Texas. He has been a member of the MACC faculty since 2000 and he was appointed president in 2007. Since then, Dr. Chávez has led the organization into its current transition from a cultural center to a Catholic college

that offers BA and MA degrees in pastoral ministry. Dr. Chávez has worked for over 30 years in a variety of ministries, including time as a teacher, youth minister, a chaplain to the incarcerated, and a community organizer. He founded a nonprofit youth organization called JOVEN and was instrumental in establishing other faith-based partnerships to address the urgent needs of families who are poor and disenfranchised. He was appointed by President Obama to serve as an advisor on the White House Council for Faith Based and Community Partnerships. Dr. Chávez holds degrees from the University of the Incarnate Word, the Oblate School of Theology of the Southwest, and the University of Denver and the Iliff School of Theology.

Katie Diller is the director of student outreach at St. John Catholic Church & Student Center at Michigan State University and the national program coordinator of ESTEEM (Engaging Students to Enliven the Ecclesial Mission), a joint project of the Leadership Roundtable and Saint Thomas More Catholic Chapel & Center at Yale University that engages young adult Catholics into the full life of the Church. As a post-graduate volunteer in the Alliance for Catholic Education (ACE), Ms. Diller served as a high school chemistry teacher in Phoenix, Arizona. She holds degrees from the University of Notre Dame, the University of Dayton, and Yale University.

Lt. Gen. James M. Dubik (US Army, Ret.), is a trustee of the Leadership Roundtable. Lt. Gen. Dubik assumed command of Multi National Security Transition Command-Iraq on June 10, 2007. During this final command, he oversaw the generation and training of the Iraqi Security Forces. Previously, he was the Commanding General of I Corps at Ft. Lewis and the Deputy Commanding General for Transformation, US Army Training and Doctrine Command. He also served as the Commanding General of the 25th Infantry Division. Lt. Gen. Dubik has held numerous leadership and command positions with airborne, ranger, light and mechanized infantry units around the world. He was commissioned a second lieutenant of infantry from Gannon University as a Distinguished Military Graduate in 1971, and he retired from service on September 1, 2008. He is a frequent writer and speaker and he holds degrees from Gannon University, Johns Hopkins University, and the US Army Command and General Staff College.

John Eriksen is the director of special projects for the Leadership Roundtable, overseeing the organization's programs focusing on Catholic schools and pooled strategic investment. He was previously superintendent of schools in the Diocese of Paterson, NJ. Mr. Eriksen began his career as a high school teacher in Notre Dame's Alliance for Catholic Education (ACE) before moving to the Leadership Roundtable, where he headed the organization's management consulting practice. He holds degrees from the University of Notre Dame and the Kennedy School at Harvard University.

Charles Geschke co-founded Adobe in 1982, driving technology innovations that forever transformed how people create and consume content across every screen. A respected and inspiring industry leader, Dr. Geschke was instrumental in developing some of the software industry's most pioneering technologies. Through his vision and passion, Dr. Geschke helped build Adobe from a start-up into one of the world's largest software companies. Today, he is co-chair of Adobe's board of directors and he continues to shape direction for the company with more than \$4 billion in annual revenue. Among many awards, Dr. Geschke was the recipient of the National Medal of Technology and Innovation, one of the nation's highest honors bestowed on scientists, engineers, and inventors. He holds a PhD in computer science from Carnegie

Mellon University as well as a master's degree in mathematics and an AB in classics, both from Xavier University. He is a trustee of the Leadership Roundtable.

Bill Gress is associate director of CSJ Ministries. Mr. Gress had been executive director of Sisters of St. Joseph Dear Neighbor Ministries, Inc., an organization that delivers services to the vulnerable, including food and emergency assistance, home visitation, representative bill paying services for people with mental disabilities, volunteer income tax preparation, transitional housing and support services for survivors of domestic violence, a food purchasing cooperative and a community garden. Mr. Gress was a Peace Corps volunteer in Romania and Macedonia and, prior to that, he worked for the Catholic Diocese of Wichita as youth program director, in various positions with Catholic Charities directing shelters, serving as Catholic Charities director of immigration and refugee services and, then, as director of operations for Catholic Charities.

Tom Healey is a partner at Healey Development, LLC, and treasurer of the Leadership Roundtable. Mr. Healey was formerly adjunct lecturer at the Kennedy School at Harvard University, where he taught the course in financial institutions and markets. Mr. Healey joined Goldman, Sachs & Co. in 1985 to create the Real Estate Capital Markets Group, and he founded the Pension Services Group in 1990. He became a partner in 1988, a managing director in 1996, and he remains a senior director of Goldman Sachs. Prior to joining Goldman Sachs, Mr. Healey served as assistant secretary of the US Treasury for Domestic Finance under President Reagan. Before joining the US Treasury, Mr. Healey spent eight years at Dean Witter Reynolds, Inc., where he was head of the Corporate Finance Department. Mr. Healey has served on the US Department of Labor's ERISA Advisory Council, and was a Presidentially-appointed director of the Securities Industry Protection Corporation. He is chairman of the Rockefeller Foundation Investment Committee and is actively involved with other charitable institutions. Mr. Healey holds degrees from Georgetown University and Harvard Business School.

Rachel Hochstetler is community relations associate for the Lucile Packard Foundation for Children's Health, the sole fundraising arm of the Lucile Packard Children's Hospital at Stanford. Prior to her work at the foundation, Ms. Hochstetler launched local and international education programs as assistant director of the Stanford Institute for Innovation in Developing Economies (SEED). Previously, she helped lead international service learning trips for MBA students at the Stanford Graduate School of Business. Before Stanford, she ran a cross-cultural education program in Benin, West Africa, and also worked for World Vision International. Ms. Hochstetler is a former ESTEEM participant at Stanford and holds degrees from the University of Notre Dame and the Stanford Graduate School of Education.

Brian Hughes is president and founder of Hughes Growth Strategies, LLC, and project manager for Leadership Capital. Mr. Hughes was previously head of business development for the Threshold Group, as well as a managing director and the national director of business development for Pitcairn, a privately owned multi-family office, where he led the firm's business development efforts on a global basis. He has more than 28 years of experience in the financial services industry, including 15 years with Lincoln Financial Advisors. Previously, he served as regional CEO for Lincoln and Sagemark Consulting, a fee-based financial planning firm in St. Louis, Missouri. Mr. Hughes is a national speaker on issues of wealth management and he holds degrees from Tampa University and the Wharton School.

Rev. Mr. John Kerrigan is the chief investment officer at Santa Clara University. Prior to joining SCU in June 2002, Rev. Mr. Kerrigan spent 25 years on Wall Street, at Salomon Brothers, Inc. and Merrill Lynch. Since 2005, he has been a director and trustee of BlackRock's iShares, a \$650 billion exchange traded fund (ETF) complex. Rev. Mr. Kerrigan is a member of the board of trustees of Sacred Heart Schools in Atherton, California, and he chairs the board of directors of the BASIC Fund (Bay Area Scholarships for Inner City Children). In May 2012 he was ordained a deacon by San Jose Diocese Bishop Patrick J. McGrath and he currently serves as a deacon at the Catholic Community at Stanford, where he implemented the Leadership Roundtable's ESTEEM program.

Susan King is secretary of the Leadership Roundtable board of directors, dean of the University of North Carolina at Chapel Hill School of Journalism and Mass Communication, and John Thomas Kerr Distinguished Professor. Prior to joining UNC, Ms. King was vice president for external affairs for Carnegie Corporation of New York. She worked for nearly five years in the US Department of Labor as the assistant secretary for public affairs and as the executive director of the Family and Medical Leave Commission. Her journalism career included stints with ABC, CBS and NBC. Ms. King was also an independent journalist reporting for CNN and ABC Radio News. She was a local television news anchor at stations in Buffalo, NY, and Washington, DC. She has hosted the "Diane Rehm Show" and "Talk of the Nation" for NPR. Ms. King holds degrees from Marymount College and Fairfield University.

Chris Lowney, formerly a Jesuit seminarian, is chair of Catholic Health Initiatives, one of the ten largest healthcare systems in the US, with more than 70 hospitals in 19 states. He previously served as managing director of JP Morgan & Co. in New York, Tokyo, Singapore, and London until 2001. Mr. Lowney's first book, *Heroic Leadership: Best Practices from a 450-Year-Old Company that Changed the World*, has been translated into eleven languages. He is also author of *Heroic Living: Discover Your Purpose and Change the World*, and *A Vanished World: Muslims, Christians, and Jews in Medieval Spain*, which was nominated for La Corónica award. Mr. Lowney was featured in the PBS-aired documentary, *Cities of Light*, which echoed many of the book's key themes. He helped launch Jesuit Commons-Higher Education at the Margins, which offers online-enabled university education in refugee camps and the Ignatian Camino (www.caminoignaciano.org), a pilgrim trail tracking Ignatius of Loyola's 1522 journey to Manresa. Mr. Lowney holds degrees from Fordham University and he has been awarded several honorary doctorates.

Jim Lundholm-Eades is director of services and planning for the Leadership Roundtable. Previously he was director of parish services and planning as well as associate director of education for the Archdiocese of St. Paul and Minneapolis. He was director of Catholic Social Services in a diocese in his home country, Australia, similar to Catholic Charities in the US. Mr. Lundholm-Eades speaks nationally on issues affecting the Catholic Church, including school planning, diocesan planning, presbyteral councils, and parish councils. He teaches graduate-level courses, including strategic planning for Catholic parishes and schools, administration and stewardship, and Catholic school finance for the Murray Institute at the University of St. Thomas in Minneapolis. He holds graduate degrees in pastoral counseling, counseling, educational administration, and business administration.

Patrick Markey is founding executive director of the United States Conference of Catholic Bishops' Office of National Collections. He has created more efficient and cost effective fundraising and grant making procedures as well as starting and developing the Solidarity Fund for the Church in Africa. He oversees and directs all bishop and staff site visits, grant training, and due diligence. As the lead staff to the subcommittee on the Church in Africa, Mr. Markey developed the bishops' Solidarity Fund for the Church in Africa. He has worked with the University of Notre Dame, Georgetown University, and other Catholic universities to build church personnel capacity in Eastern Africa. Mr. Markey is a CPA and holds an executive MBA degree from the University of Loyola in Baltimore. Mr. Markey has served many Catholic organizations, including six years as a regional director of the Focolare Movement and he is currently on the board of the Catholic Volunteer Network. His volunteer work has largely focused on leadership development, especially youth and young adult faith formation.

Katie McKenna is communication and development officer for the Leadership Roundtable and an executive committee member of ESTEEM, a Leadership Roundtable national initiative aimed at involving young adults more fully into the life of the Catholic Church. She was previously the ESTEEM project manager, leading two years of annual growth and further implementation at a number of colleges, as well as managing successful \$160,000 fundraising drive. Prior to joining the Leadership Roundtable, Ms. McKenna worked as a senior sales consultant and has volunteered in development and fundraising services to LIFT Communities and the Lead the Way Fund. She attended Denison University.

Very Rev. Brendan McGuire is pastor at Holy Spirit Parish in the Diocese of San Jose, where he also serves as vicar general. In this role, he is responsible for special projects, including the implementation of the diocesan pastoral plan. Before being ordained a priest in 2000, Fr. McGuire was executive director of PCMCIA, the PC Card trade association that promoted the international computer standard for laptop computers. Fr. McGuire has a master's degree in theology from St. Patrick's Seminary and University in Menlo Park, CA. He also has an undergraduate degree in electronic engineering and a master's degree in computer science from Trinity College, Dublin.

Megan O'Neil is university relations recruiting coordinator at Apple and a recent graduate of Stanford University, where she was president of Delta Delta Delta, winning the Outstanding Philanthropy Award for her work to raise money for the St. Jude Children's Research Hospital in Memphis, Tennessee. Ms. O'Neil was a participant in the Leadership Roundtable's ESTEEM program while at Stanford, and she recently wrote ESTEEM's first alumni newsletter.

Mary Quilici Aumack is executive director of the Catholic Community Foundation of Santa Clara County, which develops funds to provide long-term financial support of Catholic ministries in Santa Clara County. Prior to joining the foundation, Ms. Quilici Aumack worked in high tech, retiring as vice president of enterprise distribution from Hewlett Packard. She is an emeritus board member of Catholic Charities of Santa Clara County and a member of the board of fellows of Santa Clara University. She has been honored by the Association of Fundraising professionals, Silicon Valley chapter, and in 2012 she was named a Woman of Impact by Notre Dame High School. Ms. Quilici Aumack holds degrees from

Gonzaga University and Stanford University.

Rev. Thomas J. Reese, SJ, is a widely recognized expert on the Catholic Church and he is frequently cited by journalists. Fr. Reese entered the Jesuits in 1962 and was ordained in 1974. He was educated at St. Louis University, the Jesuit School of Theology at Berkeley, and at the University of California Berkeley, where he received a PhD in political science. He worked in Washington as a lobbyist for tax reform from 1975-1978. He was an associate editor of *America* magazine from 1978-1985 and editor in chief from 1998-2005, where he wrote on politics, economics and the Catholic Church. He was a senior fellow at the Woodstock Theological Center from 1985-1998 and 2006-2013. While at Woodstock, he wrote the trilogy on the organization and politics of the Church: *Archbishop: Inside the Power Structure of the American Catholic Church* (1989), *A Flock of Shepherds: The National Conference of Catholic Bishops* (1992), and *Inside the Vatican: The Politics and Organization of the Catholic Church* (1996). He also edited *The Universal Catechism Reader* (1990), an analysis of the first draft of the Catechism of the Catholic Church, and *Episcopal Conferences: Historical, Canonical and Theological Studies* (1989).

Paul Reilly is CEO of Raymond James Financial and a Leadership Roundtable trustee. He was executive chairman of Korn/Ferry International, a global provider of talent management solutions with more than 90 offices in 39 countries throughout North America, Latin America, Europe, the Middle East, Africa and Asia Pacific. Prior to Korn/Ferry, he was CEO at KPMG International, a firm of more than 100,000 employees with annual revenues of \$12 billion. Based in Amsterdam, he was responsible for the overall strategy and implementation of the firm's products, services and infrastructure on a global basis. Before being named CEO at KPMG, he ran the firm's financial services business and earlier had held senior management positions in its real estate consulting group. Mr. Reilly earned his bachelor's degree and an MBA in finance from the University of Notre Dame and holds the Certified Public Accountant designation.

Rev. William Rewak, SJ, is chancellor of Santa Clara University. He was president of both Santa Clara University and the Jesuit college of the South, Spring Hill College, in Mobile, Alabama. He earned his doctorate in English literature from the University of Minnesota in 1970.

Kerry Robinson is the executive director of the Leadership Roundtable. She is a member of the Raskob Foundation for Catholic Activities and Foundations and Donors Interested in Catholic Activities (FADICA). She has served as a trustee for several organizations, including the Education for Parish Service Foundation, the Gregorian University Foundation, the National Catholic AIDS Network, the Institute for Religious Education and Pastoral Ministry at Boston College, the Center of Applied Research in the Apostolate, the Center for the Study of Church Management at Villanova University, Busted Halo, *America* magazine, the National Pastoral Life Center, the Catholic Campaign for Human Development, and Jesuit Volunteer Corps. Ms. Robinson served as the director of development for Saint Thomas More Catholic Chapel & Center at Yale University where she led a successful multi-million dollar fundraising drive to expand and endow the Chapel's intellectual and spiritual ministry and to construct a Catholic student center. She holds degrees from Georgetown University and Yale Divinity School.

John Sobrato is founder and principal of the Sobrato Organization, one of the most successful real estate development organizations in California. Mr. Sobrato's career in real estate dates to 1957, when he began selling homes in Palo Alto while attending Santa Clara University. Building on his success in the residential marketplace, he soon expanded into commercial real estate, working with his mother in the development of industrial properties nearly a decade before the name "Silicon Valley" was coined. Among his many board positions, Mr. Sobrato is a trustee of the University of Santa Clara and vice chairman of the Latino College Preparatory Academy. In 1998 he was named the NSFRE's Philanthropist of the Year.

Sr. Lucy Silvio, CSJ, is president of the CSJ Ministries Board and she has served on the staff of the Archdiocesan Spirituality Center in New Orleans. Currently she is on staff of the St. Joseph Spirituality Center in Baton Rouge and she is the vicar for religious and associate director of seminarians for the Diocese of Baton Rouge. Sr. Silvio holds master's degrees in educational administration from the University of New Orleans and in Christian spirituality from Creighton University in Omaha. She has extensive experience in the fields of education, leadership, spiritual direction and retreat work.

THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

Appendix 2

2013 ANNUAL MEETING PARTICIPANTS

Thomas Baker is publisher of Commonweal Magazine.

Rev. Robert Beloin is chaplain at Saint Thomas More Catholic Chapel & Center at Yale University.

M'Lis Berry is director of development at the Catholic Community at Stanford.

Most Rev. Stephen E. Blaire is bishop of the Diocese of Stockton.

Betsy Bliss is managing director for JP Morgan and a trustee of the National Leadership Roundtable on Church Management.

Geoffrey T. Boisi is founding chairman of the National Leadership Roundtable on Church Management as well as chairman and CEO of Roundtable Investment Partners LLC, an independent private investment partnership.

Alexander R. Boucher is program & operations coordinator for the Catholic Apostolate Center.

Michael Brough is director of strategic engagement at The Leadership Roundtable.

Richard Burke is president and senior executive consultant of Catholic School Management, Inc.

Raymond Burnell is an education specialist for California Catholic Conference.

William Cahoy is dean of the School of Theology-Seminary at Saint John's University.

Thomas Carroll is president of the Foundation for Opportunity in Education in New York.

Samuel Casey Carter is executive director of Faith in the Future.

Kevin Carton is former senior practice partner at Price Waterhouse Cooper and a trustee of the National Leadership Roundtable on Church Management.

B.J. Cassin is chairman and president of the Cassin Educational Initiative Foundation and a trustee of the National Leadership Roundtable on Church Management.

Rev. Nathan Castle, OP, is the director of the Catholic Community at Stanford.

Arturo Chavez is president and CEO of the Mexican American Catholic College, Inc.

John Coleby is general manager at St. Joseph's Pastoral Centre.

Mary Cunningham Agee is president and founder of the Nurturing Network.

Rev. Anthony Cutcher is president of the National Federation of Priests Councils.

Peter Denio is coordinator of Catholic Standards for Excellence at The Leadership Roundtable.

Patrick Devine is vice president of Global Compensation, Oracle Corporation.

Katie Diller is director of student outreach at St. John Catholic Student Center, Michigan State University.

Elizabeth Donnelly is a trustee of the Mary J. Donnelly Foundation.

Jim Dubik is chairman of the Leadership Roundtable and Lt. Gen. (Ret.) of the US Army.

Mary Dunn is executive director of The Catholic Foundation of the Archdiocese of Santa Fe.

Rachel Elginsmith is executive director of The BASIC Fund.

John Eriksen is special projects director for the Leadership Roundtable.

Deborah A. Estes is chair of Specialty Family Foundation.

Charles Geschke is chairman of the board of Adobe Systems, Inc. and a trustee of the National Leadership Roundtable on Church Management.

Ron Ginder is director of human resources for the Diocese of St. Augustine.

Frederick W. Gluck is former managing director of McKinsey & Co. Inc. and a trustee of the National Leadership Roundtable on Church Management.

Thomas Gordon is chief operating officer of Catholic Extensions.

Bill Gress is associate director of CSJ Ministries.

Kirk O. Hanson is professor at Santa Clara and executive director at Markkula Center for Applied Ethics.

Thomas Healey is partner at Healey Development and treasurer of the National Leadership Roundtable on Church Management.

Rachel Hochstetler is community relations associate at Lucile Packard Foundation and an ESTEEM alum.

Brian J.D. Hughes is Catholic investment initiative project manager at the Leadership Roundtable.

Rev. John Hurley, CSP, is executive director of evangelization for the Archdiocese of Baltimore.

Rev. Mr. John Kerrigan is the CIO at Santa Clara University.

Susan King is dean of the UNC-Chapel Hill School of Journalism and Mass Communication, and secretary of the National Leadership Roundtable on Church Management.

Msgr. Murray Kroetsch is chancellor of the Diocese of Hamilton.

Stephanie Lane is a member of St. Raymond Parish.

Jim Long is comptroller of the Diocese of Hamilton.

Chris Lowney is chair of Catholic Health Initiatives.

Jim Lundholm_Eades is director of services and planning at The Leadership Roundtable.

Bernie Luongo Hoye is director of communications for the Diocese of San Jose.

Rachel Lustig is senior vice president of mission and ministry at Catholic Charities USA.

Gary Macy is chair of the religious studies department at Santa Clara University.

Patrick Markey is executive director of the national collections office at the USSCB.

Rev. Thomas Massaro, SJ, is dean of Jesuit School of Theology at Santa Clara University.

Kathleen McChesney is CEO of Kinsale Management Consulting and is a former trustee of the National Leadership Roundtable on Church Management.

Patrick McClain is office manager at The Leadership Roundtable.

Richard McCord is a consultant with the Reid Group.

Kevin McGowan is chief financial officer for the Catholic Extension.

Rev. Brendan McGuire is vicar general and pastor in the Diocese of San Jose.

Katie McKenna is development and communications officer for The Leadership Roundtable.

Lori Mirek is parish council chair at St. Raymond's Church.

Mark Mogilka is director of stewardship and pastoral services for the Diocese of Green Bay.

Charlie Moore is president of Coleridge, Frost & Associates and a trustee of the National Leadership Roundtable on Church Management.

Glenn D. Mueller is chairman of Catholic Textbook Project.

Anthony Mullen is regional director for Porticus North America.

Cathy Murphy is retired associate professor of Religious Studies at Santa Clara University.

Rev. Mr. Bernie Nojadera is executive director of the Secretariat for Child and Youth Protection at the USSCB.

William O'Connell is a financial advisor at Ameriprise Financial.

Rev. James Placid O'Keefe is episcopal vicar for the Diocese of Hexham and Newcastle.

Michael J. O'Loughlin is communications manager at The Leadership Roundtable.

Rev. Con O'Mahony is episcopal vicar for education at the Diocese of Hamilton.

Megan O'Neil is a recent Stanford graduate and ESTEEM participant who now works as a university relations recruiting coordinator at Apple.

Rev. Peter Pabst, SJ, is president of Cristo Rey San Jose Jesuit High School.

Ron Pelzel is board treasurer of Catholic Foundation of Santa Clara County.

Dominic Perri is program manager of the Leadership Roundtable's Catholic Leadership 360 program.

Martin Peyer is president and CEO at TADS, a service organization for Catholic Schools.

Rev. Stephen A. Privett, SJ, is president of the University of San Francisco.

Mary Quilici Aumack is executive director of the Catholic Community Foundation of Santa Clara County.

Rev. Tom Reese, SJ, is an author and journalist.

Kerry A. Robinson is executive director of The Leadership Roundtable.

Darla Romfo is president of Children's Scholarship Fund and a trustee of the National Leadership Roundtable on Church Management.

Stephanie Saroki is managing director of Seton Education Partners.

Sr. Katarina Schuth, OSF, is professor at St. Paul Seminary, University of St. Thomas.

Sr. Lucy Silvio, CSJ, is president of the board at CSJ Ministries.

Kathleen M. Smith is chief operating officer in the Diocese of Hexham and Newcastle.

David Smy is chief accountant for Archdiocese of Westminster.

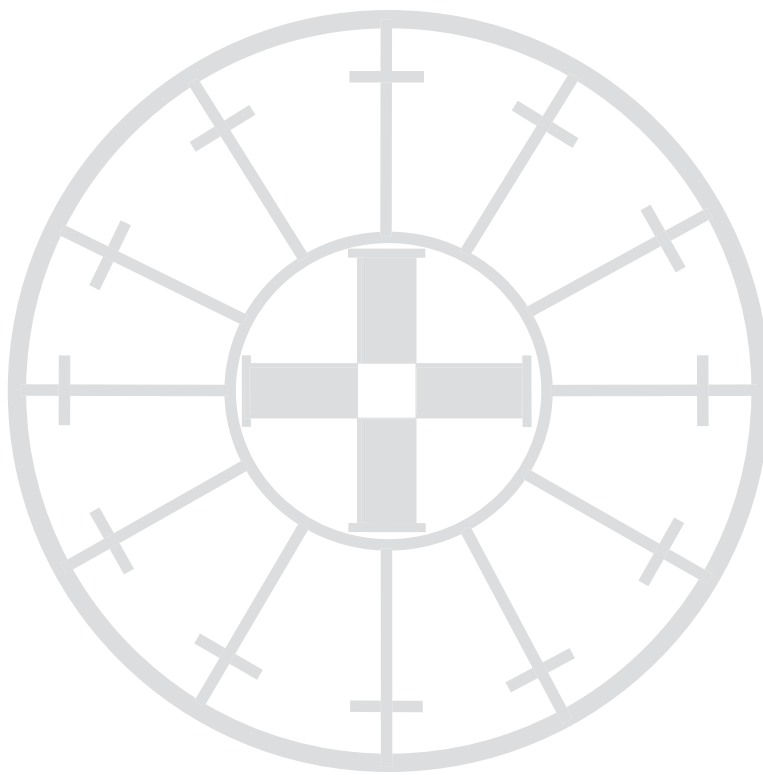
Anthony Spence is director and editor-in-chief of Catholic News Service.

Sally Vance-Trembath is professor of theology at Santa Clara University.

Rev. Jeffrey von Arx, SJ, is president of Fairfield University.

Rev. John J. Wall is president of Catholic Extension and a trustee of the National Leadership Roundtable on Church Management.

Penny Warne is pastoral associate at Holy Spirit and Our Lady of Refuge Parishes in San Jose, CA.



THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

Appendix 3

LEADERSHIP ROUNDTABLE MEMBERSHIP COUNCIL

Richard A. Abdoo is president of R.A. Abdoo & Company, LLC.

Joseph Amato is president of the Amato Family Foundation.

Christopher Anderson is former executive director of the National Association of Lay Ministry.

Harold Attridge is professor and former dean of the Yale Divinity School.

William F. Baker is president emeritus of Thirteen WNET.

Rev. John P. Beal is professor in the School of Canon Law at the Catholic University of America and a former trustee of the National Leadership Roundtable on Church Management.

Rev. Robert Beloin is chaplain at Saint Thomas More Catholic Chapel & Center at Yale University.

Betsy Bliss is managing director for JP Morgan and a trustee of the National Leadership Roundtable on Church Management.

Geoffrey T. Boisi is founding chairman of the National Leadership Roundtable on Church Management as well as chairman and CEO of Roundtable Investment Partners LLC, an independent private investment partnership.

Joseph J. Bonocore is chairman and CEO of Impresa Technologies.

Kurt Borowsky is chairman of Van Beuren Management and chairman of the Seton Hall University Board of Regents.

Mary M. Brabeck is dean of the Steinhardt School of Culture, Education, and Human Development at New York University and a former trustee of the National Leadership Roundtable on Church Management.

Anthony Brenninkmeyer is former CEO of American Retail Group, a trustee of FADICA, and a former trustee of the National Leadership Roundtable on Church Management.

Kathleen Buechel is retired president of Alcoa Foundation and senior lecturer at the University of Pittsburgh's Graduate School of Public and International Affairs.

Anne Burke is a justice of the Illinois Supreme Court.

Richard Burke is president and senior executive consultant of Catholic School Management, Inc.

Jane Burke O'Connell is president of the Altman Foundation.

Francis Butler is president emeritus of FADICA.

Rev. William J. Byron, SJ, is professor of business and society at St. Joseph's University.

Nicholas P. Cafardi is dean emeritus and professor of law at Duquesne University Law School.

Lisa Cahill is professor of theology at Boston College.

Guido Calabresi is Sterling Professor of Law emeritus and former dean of the Yale Law School, and a judge on the U.S. Court of Appeals, Second Circuit.

John Caron is retired president of Caron International.

Kevin Carton is former senior practice partner at Price Waterhouse Cooper and a trustee of the National Leadership Roundtable on Church Management.

B.J. Cassin is chairman and president of the Cassin Educational Initiative Foundation and a trustee of the National Leadership Roundtable on Church Management.

Anthony J. Cernera is former president of Sacred Heart University.

Arturo Chavez is president and CEO of the Mexican American Catholic College, Inc.

Denis Cheesebrow is the president and founder of Teamworks International.

Charles Clough, Jr. is chairman and chief executive officer of Clough Capital Partners, LP.

Michael D. Connelly is president and CEO of Catholic Healthcare Partners in Cincinnati, OH.

John M. Connors, Jr. is chairman and CEO of Hill, Holiday, Connor, and Cosmopolos.

Mary Cunningham Agee is president and founder of the Nurturing Network.

John P. Curran is a trustee of the John P. and Constance A. Curran Charitable Foundation.

Barbara Anne Cusack is chancellor of the Archdiocese of Milwaukee.

James Davidson is professor of sociology at Purdue University.

John DeGioia is president of Georgetown University.

Daniel Denihan is principal of Denihan Capital and a trustee of the National Leadership Roundtable on Church Management.

John DiJulio is a professor of law at the University of Pennsylvania.

Ned Dolejsi is executive director of the California Conference of Catholic Bishops.

Elizabeth Donnelly is a trustee of the Mary J. Donnelly Foundation.

Jim Dubik is chairman of the Leadership Roundtable and Lt. Gen. (Ret.) of the US Army.

Sr. Karin Dufault, SP, is general superior of the Sisters of Providence International Community.

Rev. Robert D. Duggan is a researcher at the Catholic University of America.

Cynthia Lee Egan is president of retirement plans at T. Rowe Price.

Elizabeth Eisenstein is a member of the Amaturio Family Foundation and a member of FADICA.

Sr. Janet Eisner, SND, is president of Emmanuel College.

Marilou Eldred is the President of the Catholic Community Foundation.

Mary Jane England is president emeritus of Regis College.

Sr. Sharon Euart, RSM, is executive coordinator of the Canon Law Society of America.

Geno Fernandez is executive vice president of Zurich North America and a trustee of the National Leadership Roundtable on Church Management.

Joseph F. Finn is a partner of Finn, Warnke & Gayton.

Peter M. Flynn is chief financial officer for the Diocese of Fort Worth.

W. Douglas Ford is the former chief executive of refining and marketing for BP.

Carol Fowler is former director of the department of personnel services for the Archdiocese of Chicago and a former trustee of the National Leadership Roundtable on Church Management.

Zeni Fox is professor at Seton Hall University.

Norman Francis is president of Xavier University of Louisiana in New Orleans, and a trustee of the National Leadership Roundtable on Church Management.

William P. Frank is senior partner at the law firm Skadden, Arps, Meagher & Flom LLP.

Rev. Michael J. Garanzini, SJ, is president of Loyola University Chicago.

Charles Geschke is chairman of the board of Adobe Systems, Inc. and a trustee of the National Leadership Roundtable on Church Management.

Frederick W. Gluck is former managing director of McKinsey & Co. Inc. and a trustee of the National Leadership Roundtable on Church Management.

Sr. Doris Gottemoeller, RSM, is senior vice-president, mission values integration, for Catholic Healthcare Partners.

Sr. Katherine Gray, CSJ is former general superior of the Sisters of St. Joseph of Orange.

Thomas Groome is chairman of Boston College School of Theology and Ministry.

Mary Ann Gubish is director of the department for envisioning ministry for the Diocese of Pittsburgh.

Michael J. Guerra is past president of the National Catholic Education Association.

Ken Hackett is former president and executive director of Catholic Relief Services and nominee for United States Ambassador to the Vatican.

Patrick T. Harker is president of the University of Delaware and a former trustee of the National Leadership Roundtable on Church Management.

Alice B. Hayes is former president of the University of San Diego.

Thomas Healey is partner at Healey Development and treasurer of the National Leadership Roundtable on Church Management.

Rev. J. Bryan Hehir is secretary for social services for the Archdiocese of Boston and a trustee of the National Leadership Roundtable on Church Management.

James Higgins is senior advisor for Morgan Stanley.

Rev. Michael Higgins, CP, is director of the development office for Holy Cross Province.

Rev. Dennis Holtschneider, CM, is president of DePaul University.

Lori Hricik is director of The Depository Trust and Clearing Corporation.

Rev. John Hurley, CSP, is executive director of evangelization for the Archdiocese of Baltimore.

Frank J. Ingrassia is former managing director at Goldman, Sachs & Company.

Rev. Msgr. Thomas P. Ivory is pastor emeritus of the Church of the Presentation in Upper Saddle River, NJ.

Marti Jewell is former director of the Emerging Models of Pastoral Leadership Project.

Sr. Mary Johnson, SND, is professor of sociology and religious studies at Emmanuel College.

Br. Thomas Johnson, FSC, is vicar general of the Institute of the Brothers of the Christian Schools.

Sr. Carol Keehan, DC, is president and CEO of the Catholic Health Association and a former trustee of the National Leadership Roundtable on Church Management.

Joseph Kelsch is director of business operations for St. Anne Catholic Community.

Victoria Reggie Kennedy is a trustee of the National Leadership Roundtable on Church Management.

Rev. J. Cletus Kiley is director for immigration policy for UNITE HERE.

Susan King is dean of the UNC-Chapel Hill School of Journalism and Mass Communication, and secretary of the National Leadership Roundtable on Church Management.

Dolores Leckey is senior fellow at Woodstock Theological Center and advisor to the U.S. Conference of Catholic Bishops.

Rev. Paul Lininger, OFM Conv., is former executive director of the Conference of Major Superiors of Men.

T. Michael Long is a partner at Brown Brothers Harriman.

Michael Madden is principle partner at BlackEagle Partners, LLC.

Rev. Msgr. James T. Mahoney is vicar general of the Diocese of Paterson.

Kathleen Mahoney is former president of Porticus North America Foundation.

Rev. Edward A. Malloy, CSC, is president emeritus of the University of Notre Dame and a former trustee of the National Leadership Roundtable on Church Management.

Josephine C. Mandeville is president of the Connelly Foundation.

Alfred Martinelli is former chairman of the Buckeye Pipeline Company.

John H. McCarthy is senior fellow at the Hauser Center at Harvard University.

Margaret W. McCarty is executive director of the Christian Brothers Conference.

Elizabeth McCaul is a partner at Promontory Financial Group and partner-in-charge of the New York office.

Kathleen McChesney is CEO of Kinsale Management Consulting and is a former trustee of the National Leadership Roundtable on Church Management.

Owen McGovern is president of Catholic Solutions.

Anne McNulty is a private investor.

Rev. Joseph M. McShane is president of Fordham University.

Charles Millard is director of the Pension Benefit Guaranty Company.

Robert Miller is director of the office for research and planning for the Archdiocese of Philadelphia.

Sr. Patricia Mitchell, SFCC, is executive director of Silicon Valley FACES.

Rev. J. Donald Monan, SJ, is the chancellor of Boston College and is vice-chair of the National Leadership Roundtable on Church Management.

Michael Montelongo is senior vice-president of strategic marketing for SODEXHO, Inc.

Paul M. Montrone is chairman and CEO of Fisher Scientific International, Inc.

Carol Ann Mooney is president of St. Mary's College in South Bend, IN.

Charlie Moore is president of Coleridge, Frost & Associates and a trustee of the National Leadership Roundtable on Church Management.

Mary Jo Moran is executive director of the National Association of Church Personnel Administrators (NACPA).

R. Michael Murray, Jr. is a member of the advisory committee for McKinsey & Company, Inc.

Michael Naughton is director of the John A. Ryan Institute for Catholic Social Thought at the University of St. Thomas.

Joan Neal is Organizational Development Consultant at JF Neal Consulting.

Rev. Robert Niehoff, SJ, is president of John Carroll University.

Margaret O'Brien Steinfels is co-director of the Fordham Center on Religion and Culture at Fordham University.

Ralph A. O’Connell is provost of New York Medical College and the dean of the School of Medicine.

William O’Connell is a financial advisor at Ameriprise Financial.

John J. O’Connor is CEO of JH Whitney Investment Management, LLC.

Leon Panetta is former secretary of defense and a former trustee of the National Leadership Roundtable on Church Management.

Sr. Catherine M. Patten, RSHM, is former coordinator for the Catholic Common Ground Initiative.

Roger Playwin is national executive director of the Society of St. Vincent de Paul.

R. Robert Popeo is chairman of Mintz, Levin, Cohn, Ferris, Glovsky & Popeo, PC.

James Post is past president and co-founder of Voice of the Faithful.

Richard Powers, III is a trustee of the National Leadership Roundtable on Church Management.

Rev. Tom Reese, SJ, is an author and journalist.

Paul Reilly is CEO of Raymond James and a trustee of the National Leadership Roundtable on Church Management.

Sr. Terry Rickard, OP, is director of RENEW International.

Kerry A. Robinson is executive director of The Leadership Roundtable.

Gerard R. Roche is senior chairman of Heidrick & Struggles.

Darla Romfo is president of Children’s Scholarship Fund and a trustee of the National Leadership Roundtable on Church Management.

Cynthia Rowland is a partner of Coblenz, Patch, Duffy & Bass LLP.

Joseph Roxe is chairman of Bay Holdings, LLC.

Michael Schafer is the executive director of the Catholic Finance Corporation.

Br. Robert Schieler, FSC, is general council of the De La Salle Christian Brothers.

Sr. Katarina Schuth, OSF, is professor at St. Paul Seminary, University of St. Thomas.

Rev. Msgr. Robert T. Sheeran is former president of Seton Hall University.

Marianne D. Short is a partner with Dorsey and Whitney, LLP.

Rev. John Sivalon, MM, is former superior general of Maryknoll Fathers and Brothers.

Rev. Thomas H. Smolich, SJ, is president emeritus of the Jesuit Conference and president of the Conference of Major Superiors of Men.

Rev. Larry Snyder is president of Catholic Charities USA.

Anthony Spence is director and editor-in-chief of Catholic News Service.

Rev. Msgr. John J. Strykowski, STD, is rector of the Cathedral-Basilica of St. James in the Diocese of Brooklyn.

Br. Stephen Synan, FMS, is president of the Religious Brothers Conference.

Richard F. Syron is former chairman and CEO of Freddie Mac and a trustee of the National Leadership Roundtable on Church Management.

Dominic Tarantino is retired chairman of PriceWaterhouseCoopers, LLP.

Thomas Tierney is chairman and founder of the Bridgespan Group.

Sr. Kathleen Turley, RSM, is former chancellor of the Diocese of Albany.

Rev. Richard Vega is former president of the National Federation of Priests’ Councils.

Fay Vincent is former commissioner of Major League Baseball.

Rev. Jeffrey von Arx, SJ, is president of Fairfield University.

Rev. John J. Wall is president of Catholic Extension and a trustee of the National Leadership Roundtable on Church Management.

Don C. Watters is a former director of McKinsey & Company.

John A. Werwaiss is CEO of Werwaiss & Co., Inc.

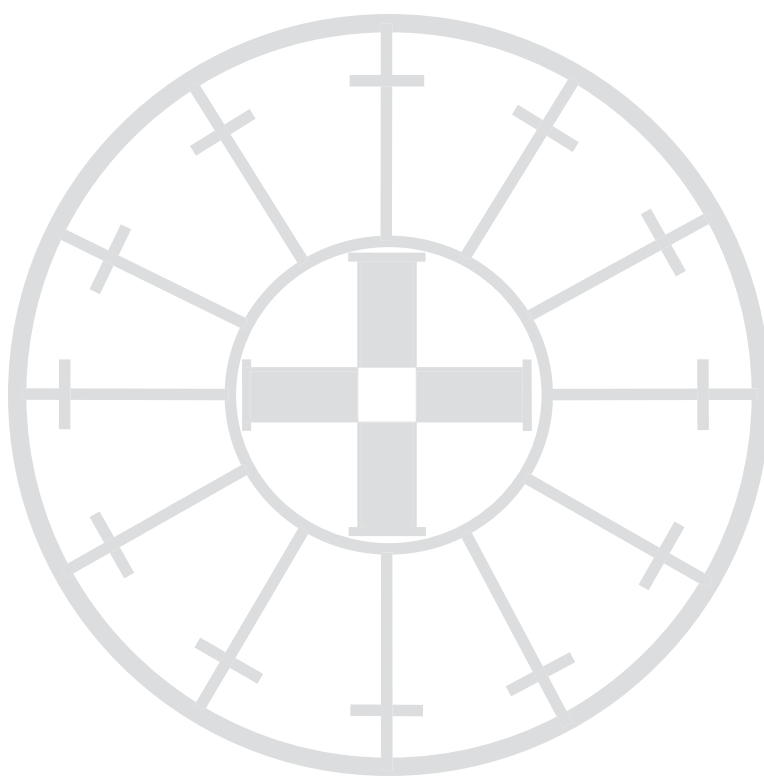
Paul Wilkes is a writer and editor.

Charmaine Williams is a consultant to the Diocese of Fort Worth.

Sr. Susan Wolf is internet and social media strategist of Catholic Web Solutions

Carolyn Woo is president and CEO of Catholic Relief Services.

Charles E. Zech is director of the Center for the Study of Church Management at Villanova University.



THE NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

A CALL TO COMMUNION: CO-RESPONSIBILITY FOR THE GOOD OF THE CHURCH

2013 Annual Meeting | Santa Clara University | June 25-27, 2013

www.TheLeadershipRoundtable.org/AnnualMeeting

Appendix 4

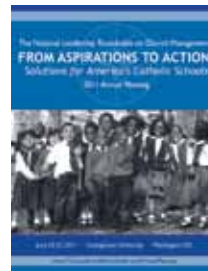
LEADERSHIP ROUNDTABLE PUBLICATIONS

Visit www.TheLeadershipRoundtable.org/Publications
to download copies of previous publications.



Managing for Mission: Building Strategic Collaborations to Strengthen the Church

Topics include partnership, connecting with funders, lessons from the US Army, and the end of assumed virtue for nonprofits. (2012)



From Aspirations to Action: Solutions for America's Catholic Schools

Topics include the case for Catholic schools, creating a culture of excellence, and 94 recommendations to strengthen Catholic schools. (2011)



A Blueprint for Responsibility: Responding to Crises with Collaborative Solutions

Topics include the case for transparency and accountability in a global church, the lessons learned from the sex abuse crisis in the US, and philanthropy and accountability in uncertain economic times. (2010)



Clarity, Candor and Conviction: Effective Communications for a Global Church.

Topics include the future of communications, the growing Catholic Latino population in the U.S., and transcripts of keynote addresses from Prime Minister Tony Blair and Bishop Gerald Kicanas. (2009)



Managerial Excellence: Engaging the Faith Community in Leadership in the Church Today.

Topics include a parish ministry assessment tool, best practices from model parishes, and challenges and solutions in Church strategic planning. (2008)



Give Us Your Best: A Look at Church Service for a New Generation.

Topics include identifying the next generation of Church leaders and ministers, and recruiting the very best for Church service. (2007)



Bringing Our Gifts to the Table: Creating Conditions for Financial Health in the Church

Topics include effective diocesan planning and the power of economies of scale in the Church. (2006)



The Church in America: Leadership Roundtable 2005 - A Call to Excellence in the Church (2005)

**The National Leadership Roundtable
on Church Management**

2014 ANNUAL MEETING

Loyola University Chicago
Chicago, Illinois

JUNE 24-26, 2014

Registration Opens in January 2014 at

www.TheLeadershipRoundtable/AnnualMeeting
