

## LEADERSHIP ROUNDTABLE

Service. Excellence. Church Management.

# The Francis Effect and Changing Church Culture: Advancing Best Managerial and Leadership Practices

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**June 29–30, 2016**

Inn at Penn, Philadelphia, PA

### **LEADERSHIP ROUNDTABLE**

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*Connelly Foundation*



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2016 ANNUAL MEETING

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# Welcome

**Kerry Alys Robinson**, Executive Director, Leadership Roundtable

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**KERRY ALYS ROBINSON:**

Welcome to Philadelphia. Welcome to an extraordinary opportunity to make a substantive, innovative, creative, and faithful contribution to the Church at the local diocesan, national, and now global level. Thank you for being here. Thank you for your leadership in the Church and in the world. Thank you for your pastoral effect and your analytical acumen. Above all, thank you for your evident care of the Church, our beloved Church, and for your faith and your magnanimity reflected in the generosity of your time, expertise, financial support, inspiring witness, and advocacy of the Church you want to see and you know is possible, a Church that is trusted, accountable, transparent, ennobling, Christ-like, humble, powerful, effective, ethical, and irresistible.

One does not have to think long on the heartbreaking, deeply serious challenges facing our nation and the world to realize what an important asset the Church globally is, its explicit religious mission we attest as salvific. It is the largest global humanitarian network in the world. Its commitment to bearing witness to hope, to compassion, to mercy, and to reconciliation and justice, these are the

reasons it matters to work on behalf of the Church, to ensure that the Church has every resource at its disposal to care for, account for, and carry forward its mission. What we collectively do matters, and it matters deeply. Our work is not for the faint of heart. There are no quick fixes, and it doesn't intuitively pull at the heartstrings. But every day that we contribute to a change in consciousness about the importance of best managerial practices; every week that we advance the importance of utilizing the managerial expertise of laity; every month that we help Church leaders solve complex temporal challenges; and every year that we establish positive managerial reform, accountability, transparency, ethics, and excellence as constitutive of what it means to be Church, is time very well spent.

Twelve years ago, Geoff Boisi, our founder, convened hundreds of leaders from the Church and world in this very city. A conference entitled "Church in America," in the aftermath of the devastating sexual abuse crisis, was designed to answer one important and deeply faithful question: How can we collectively effect healing and reconciliation in the Church, restore

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*How blessed we are to have the leadership of Pope Francis, who is making positive managerial reform a signature of his Pontificate.*

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trust, solve temporal challenges, and create the conditions and the culture that would allow the Church to benefit from contemporary managerial practices and protocols of ethics and excellence? For many of the founding trustees and for me, returning to Philadelphia is nostalgic. We can appreciate how far we have come in 12 years. No longer an experiment, we are trusted and respected by Church leaders. These are exciting days for the Roundtable, new days requiring new strategic commitments, new leadership, new marketing, new philanthropic investors, new programmatic approaches, and new partnerships. How blessed we

are to have the leadership of Pope Francis, who is making positive managerial reform a signature of his Pontificate. We have duly chosen the theme, **The Francis Effect and Transforming Church Culture: Advancing Best Managerial and Leadership Practices.**

And now before we formally begin the program, it is my pleasure to introduce a colleague in Catholic philanthropy and a friend over many years now, a local host, Vice President for Planning at the Connelly Foundation, Tom Riley. The Connelly Foundation has been a model and an inspiration, a remarkable support

to the Church in Philadelphia, truly a sister foundation to my own family's philanthropy, the Raskob Foundation for Catholic Activities. Tom has graciously agreed to lead us in prayer. His family has generously helped to support this gathering today, and we are very grateful.



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# Opening Prayer

**Tom Riley**, Vice President for Strategic Planning, Connelly Foundation

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**TOM RILEY:** Thanks, Kerry, and thank you for all you do for this organization. You have really been inspiring to all of us for a number of years. Thanks, everybody, here too for coming to this excellent meeting - and welcome to Philadelphia.

Philadelphia, of course, is a city rich with history. One of the most interesting elements of that history, I think, is the history of the Church in Philadelphia. It is interesting that a lot of people think of Philadelphia as a particularly Catholic city, probably because of the many different Catholic colleges, universities, and institutions here and the large Catholic population. But of course, that wasn't always the case. At the time of the American Revolution, Catholics made up less than one percent of the population of Philadelphia.

In fact, it was at that time that John Adams was in Philadelphia for the Continental Congress, and he attended for the first time a Catholic Mass at Old St. Mary's. This is how he described that exotic experience to his wife, Abigail, in a letter: "The music, consisting of an organ and a choir of singers, went all the afternoon, except for sermon time, and the assembly chanted most sweetly and exquisitely. Here is everything that can lay hold of eye, ear, and imagination, everywhere which can charm and bewitch the simple and ignorant. I wonder how Luther ever broke their spell."

So, almost 250 years later in a gesture that surely would have astonished Adams, the Catholic Pope himself came to Philadelphia, and spoke to the world from here last fall on the important topic of religious freedom. And he spoke from the very steps of Independence Hall where Adams and his colleagues were arguing about that topic.

"Prayer," says Pope Francis, "is the way out of a closed heart and mind." So I think it is fitting that we begin today's meeting with Pope Francis's prayer from the World Meeting of Families:

"God and Father of us all, in Jesus, your Son and our Savior, you have made us your sons and daughters in the family of the Church. May your grace and love help our families in every part of the world be united to one another in fidelity to the Gospel. May the example of the Holy Family, with the aid of your Holy Spirit, guide all families, especially those most troubled, to be homes of communion and prayer, and to always seek your truth and live in your love. Through Christ our Lord. Amen. Jesus, Mary, and Joseph, pray for us."



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# A Renewed Vision: Agility in a Changing Landscape

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

**David Melançon**, Managing Director of Corporate & Public Affairs, NY Office, Edelman

**Michael O'Loughlin**, Author, *The Tweetable Pope: A Spiritual Revolution in 140 Characters*



**JAMES DUBIK:** I first want to thank the Connelly Foundation and other donors for their generosity that made this meeting possible. Thank you very much.

The topic of our first panel is: **A Renewed Vision: Agility in a Changing World.**

There are some assumptions behind the title of this session. I'll list four of them.

First, that leadership takes place in the space between "is" and "ought," where

a leader's organization is and where that organization ought to be, which, of course, means that the leader has to understand where his or her organization is and figure out where it ought to be and why, because a leader can't really generate followers without explaining, why the organization has to move in a compelling way. A leader without followers is, well, the Lone Ranger. Second, leadership is about figuring out how to move from "is" to "ought," and to be complete and accurate, a leader can't usually figure this stuff out alone, which leads to the third assumption; that is, leadership is a collaborative effort.

And then, last, leadership is about putting structures and processes in place to manage and adapt initial decisions as the organization learns in the process and reality unfolds. There is no agility unless you have a sufficiently effective management structure and processes in place.

So, with this in mind, I want to describe what Leadership Roundtable itself has

been up to in the last year-plus. Our initial 10-plus years were spent in three major categories: 1) building trust in the Roundtable; 2) creating a set of services and resources that were properly adaptive from the corporate world or the secular world so that they could fit in the Church culture and the Church needs; and then 3) overcoming inertia with respect to systemic, transparent approaches to temporal management within the church.

About two years ago, the staff and the Board, as a result of our annual strategic review, realized that our strategic landscape was starting to shift, and some—not all, but some of what we were seeing is this. First, the demand for our services and resources

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*Leadership is about  
figuring out how to move  
from “is” to “ought.”*

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was going up—Catholic Standards for Excellence, Catholic Leadership 360, executive leadership coaching for bishops, priests, and lay leaders—all demands going up. The demand for Toolbox for Pastoral Management is also going up. In particular, the latter was being delivered not just in many new places, but in several varieties to meet the specific needs of those who were attending. And seminaries started to come to us for a discussion about how to incorporate temporal management into their programs. ESTEEM, our leadership program for young adults, took off, and business leaders, philanthropists and clerical leaders from another nation had come to talk to us about replicating the Roundtable approach in their country, and since then, three other countries have come to us with the same request.

So all that came together when Pope Francis came to the scene, and of course, his reform program and his pastoral example has just accelerated all of that and motivated so many of us, inspired so many of us to get on with reform and change and adaptation. So we could have concluded in the discussion, the Roundtable Board and the staff, that all this was evidence that what we were doing was good and right, and we should continue to do what we were going. That might have been kind of the normal organizational approach, but the Board made a different conclusion. The Board decided that what we had to do was some serious thinking about where our organization was and where it ought to go, and the Board set in place a year-long, extensive strategic review. Some of the Board and staff worked on our strategic plan and our priorities and our approach. Some looked at our organizational capacity, not just in terms of size and composition of our staff as it was, but also

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*Agility in a changing world is  
a demand on all of us as leaders.*  
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what were the new skill sets and the new set of procedural disciplined processes that we have to put in place to meet this new landscape. And then others looked at our current financial status and projected future requirements.

And in all, what we came to understand is, organizationally, Leadership Roundtable was entering a new period. We described it as moving from Roundtable 1.0, kind of startup mode, to 2.0, and we define 2.0 as accelerating the momentum that we saw building around the country and around the world.

To meet this new requirement, to make sure that we could both meet the demands that we were seeing and to do our part in the “Francis effect,” we came to several conclusions. One, we had to update or reaffirm our mission, vision, and guidance principles, which we have done. Second, we wanted to shift from an executive director to a CEO, and we’re in the final stages of hiring a CEO. Don’t worry. Kerry Robinson is not going anywhere. We also thought that we needed to create new directorates—a marketing directorate, a communication directorate, and a development directorate—which we’ve taken the preliminary steps and will move along those lines once the CEO is on board. We began the work on rebranding and re-messaging, hence, our new website ([leadershiproundtable.org](http://leadershiproundtable.org)), our new name, our new logo, our new tagline, and David is going to talk a little bit about that. We also wanted to expand our donor base and our foundation base and build a bigger set of philanthropic partners,

which we have begun to do, but we still have some work to do on that. And the Board decided that we wanted to create a leadership position and then give that person the responsibility to figure out what is the appropriate international partner mode so that we don’t dissipate our focus in the United States but, again, do our part for the global Church. And we intend to give that position to Kerry once the CEO is on board, so she will still be very much the face of our organization and involved in everything that we do.

And, last, we wanted to narrow the scope of our resources and services during this transition from 1.0 to 2.0 as we take all these actions, and we’re in the midst of every one of these changes. It’s taken a bit longer than all of us would have liked, but we’re dedicated to pick the right people. We’re dedicated to see this through, and from our perspective, that’s what agility in a changing world looks like. Rather than resting on laurels, an organization has to be willing and able—and that probably will be the hardest thing—to see the changes in the environment, define the difference between where the organization is and where it ought to be, figure out how to make that move, and do that together with staff, Board members, and partners, and then manage that move into completion, and through the management always to be ready to adapt as necessary because reality does not stand still. Just because we looked at it and defined it once, a timepiece of one, time moves on and things change. So opportunities will pop up, and obstacles will as well.

So, even if you're having success, our view is that agility in a changing world is a demand on all of us as leaders and if an organization doesn't adapt constantly, well, Darwin starts looking at that organization. And at the very least, the organization will start losing its edge and perhaps its relevancy.

**DAVID MELANÇON:** Thanks, Jim. I'd like to show you some of the brand work that we've been referencing. I want to talk about it, not just because I want to show you the work. I want to use that as a leaping-off point to talk about how you reach all your stakeholders, how you connect with them. Words like "marketing" and other sort of brand-building words seem like they belong to the commercial world and don't necessary belong to us in the Church. But they actually do. It's the way that people interact today. It's the way that young people especially think, and even though we say young people, it's really all of us. We all react to brands in the same way, and so I want to show you how this works.

The first step in building a brand, is figuring out the space that Jim talked about, the space between "is" and "ought." That really is what brand-building is about. The first thing you have to do is to decide what kind of organization are you, what kind of organization do you want to be, and then how do you get there, because in a brand, you can message where you want to go as well as where you are. Those brands that jump ahead and go to where they want to be without referencing where they are often lose people, because they don't seem authentic, but if you start from who you are and where you want to go, you can build a strong brand foundation.

What we did with Leadership Roundtable was figured out who they were and who they wanted to be. There are three parts of



their brand: It's a humble, powerful, partner to those it serves.

Once we determined this, the staff and the Board asked themselves: what does that mean? They were able to think about how to manifest this. They can now ask themselves when they are entering into an engagement: Is this how a partner would act? Is this what humility is in being a partner to those we serve? And by going through this process, an organization can actually figure out what its brand should be and how to build on that brand.

Take the logo for example. The purpose of the logo is to obviously invoke some of the equities that the Roundtable already had—round table, that's pretty easy—to simplify the name, to create a tagline underneath that could convey what Leadership Roundtable was about. So humble, powerful partner, that's who we are, but

that's not necessarily what we say. We should just show that, and we show that by providing service, excellence, and Church management. That's our tagline.

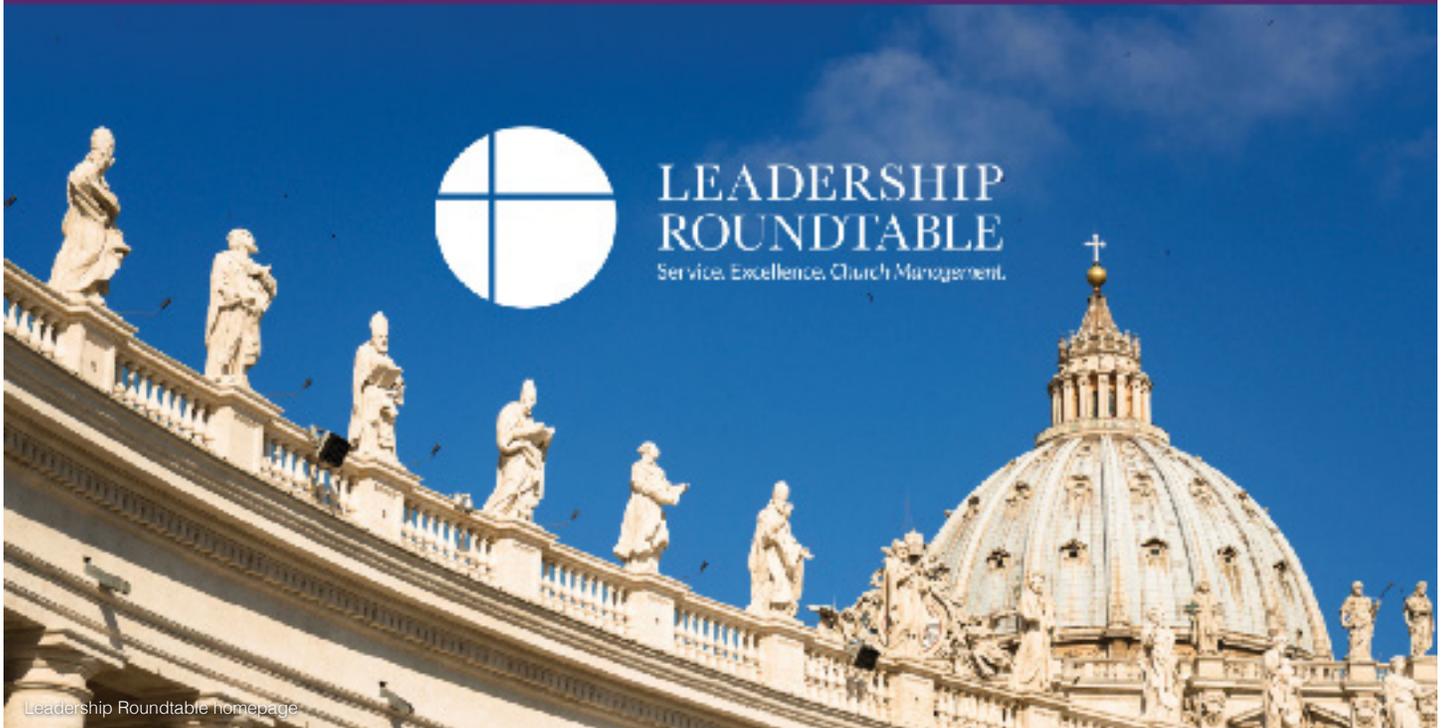
The mark invokes a couple of additional things. You can look at it different ways. Some people look at it and they see the host. Some people look at it and they see a pie chart. Some people see four factions of different sizes coming together. All of those things are true, and all of those things work, depending on what you see.

From that, we built a set of brand guidelines that allows the staff and the Board to create other touchpoints and materials. The guidelines answered questions like: What should our photography look like? How should we be talking? What's our voice as a staff, as an organization? All of those things are brand touchpoints that you have to bring to life.

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*We've got to be where our stakeholders are if we want to connect with them.*

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Leadership Roundtable homepage

The brand touchpoint that I think is key, though, is the website, [leadershiproundtable.org](http://leadershiproundtable.org), which is the most prevalent way that people are going to see us. This is the number one way that people are going to reach any of our organizations today, whether or not you're a business, whether you're a Church. We all know it. They're reaching us through their phones. They're reaching us online, and so we've got to be where our stakeholders are if we want to connect with them. That's why the website was critically important.

When you go to the website and look through some of the pages, you'll see that we've got all of the background that you'd find on any website. You've got all of the same information that you had before, but it's organized in a way that feels on brand. This is where the choices that you make from a brand perspective are so important. We made the decision to go with original photography. For instance,

we show churches and all of the photos on programmatic pages include people because we really wanted to show—if you think about humble, powerful partner—that there is a humanity there; it's not just organizational.

Those things are what are right for Leadership Roundtable. They're not necessarily right for every brand, every organization, but it's that sort of thinking; everything counts, everything communicates. And it's that sort of thinking that goes into building a brand, and that sort of conscious thought and rigor is something that we should all be giving to all of our brands. And that's one of the temporal points of excellence that we need to start thinking about beyond just management.

**MICHAEL O'LOUGHLIN:** Before I begin, I just want to thank Kerry for inviting me to be back here. I worked for Leadership Roundtable for about 5 years. It was my first job out of grad school, and

I left a couple years ago to go write for the *Boston Globe* to cover the Catholic Church, and now I'm headed to *America* to continue covering the Church for them.

I was asked to talk a little bit about agility and communications and to highlight some examples of leaders in the Church who lead with certain attributes that we might take to our own organizations. I just wanted to share a quick story with you that does have a point, I promise. A couple of years ago now, I was sent to Rome to cover the Synod of Bishops on the Family. You might remember that this was this meeting that Pope Francis called of bishops from around the world to come to Rome and talk about family issues, some controversial issues, some contentious issues, that if they were talked about before at all, it was kind of hush-hush, and now Pope Francis was bringing these issues out into the open and asking how the Church can respond to modern family situations.

This was my first trip to Rome as a reporter, and going over as a professional and also as a practicing Catholic, it was a really moving week to be over there interviewing cardinals, learning how the Vatican works, getting to know the Vatican Bank, the Vatican bureaucracy. It was really an overwhelming week.

Toward the end of the week, I found myself at dinner with a priest who works with Vatican officials. He knows the Pope. He has the ear of the Pope when he wants it, and we were at dinner not far from St. Peter's. We had had a couple glasses of wine—which in Rome is cheaper than a can of Diet Coke, which is nice—and as we were wrapping up, we realized that we were going in the same direction. My hotel was near where he was staying. So he said, "Let's walk together, and I want to show you something." So we walked to St. Peter's, and he takes me to a spot right in the middle. And for anyone who has ever been there, there is this kind of circular piece of concrete in the middle, and when you stand there, everything lines up perfectly symmetrical. So we're there on a beautiful October night. It's cool, crisp, clear. The dome of St. Peter's is illuminated behind us. The columns of Bernini are lined up perfectly, and it's a little emotional. This week has been a little overwhelming for me. And I have this priest here who says, "Michael, I want to tell you something." So I get ready. Maybe he's telling me something about the Pope, or a little bit of wisdom that I can think about on my long flight back to Chicago. He says, "Michael, take a look around," and he points up at the dome. "Nowhere else can you cram more dysfunction into one square mile. Welcome to the Vatican!"

I tell that story for a couple of reasons. It sticks with me because I think it sums up how I view the Church in my own work.



The Church is at once incredibly inspiring to countless millions of people around the world. It's how we connect with God, connect with each other, form our communities—and at the same time, it's dysfunctional in many ways. It's a human institution, after all. And the fact that you are all here because you're committed to improving that dysfunction, I think is a testament to your own faith, and it's inspiring to people like me who want to see the Church thrive and survive.

Now, that dysfunction is also a cause for concern for Pope Francis as well, and as many of you know, he's undertaken several reform efforts to improve the Church's operations, including communications. The Vatican has a sprawling, if somewhat bumbling communications program, and Pope Francis for the past year has challenged Vatican leaders to consider ways to use their resources more effectively to get the Church's message out. And we're in the

middle of that process now, and we're all eagerly looking to see how the Church might improve its communications efforts.

Speaking of the Pope, I returned to the Vatican about a year later, last October, only by then, I had written a book about Pope Francis.

It's called *The Tweetable Pope*. It's an examination of Pope Francis' Twitter account and how he uses social media to communicate the Gospel and his own goals for his papacy.

So, this priest I know had arranged a short meeting where I would be able to give the Pope a copy of my book and explain to him what it was all about. During a coffee break one morning, we were whisked into a side room. We had about 20 minutes with Pope Francis, and as I explained what the book was about, he started smirking. He said that he was amazed that I found anything of value in his tweets, that I

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*We spend so much of our time in front of screens on our phones and computers, and if the Church isn't there, we're not with people.*  
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could write a whole book about them, in fact. He went on to call it “an interesting idea,” which I think is a great papal endorsement for a book.

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*If Twitter is good enough for Jesus, who are we to say no?*

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I tell that not only to plug the book, but because I think it shows how he leads. This is a man who is a self-described dinosaur when it comes to technology. He says that he doesn't know how to operate a computer. He has somewhat of a grasp on what social media is, but he certainly is not punching out his own tweets. And yet he's risen to become the most influential global leader on Twitter just 3 years into his papacy. That means his followers on Twitter are engaging his tweets at a much higher rate than other world leaders. While he has far fewer followers, about 30 million now, than people like Katy Perry or Justin Bieber, the Pope's followers are much more engaged. They want to share his message. They want to promote it to their own friends. They might think about what he's saying throughout the day, and I think that that shows he's confident enough to rely on advisors who say, “You need to be out on social media. You don't know how to do it. We'll do it for you.” And he says, “Go. Do it. This is where we need to be. You'll carry out my message for me.” So it takes that kind of confidence to know that you need to surround yourself with the right people who know how to get your message out for you.

Now, when I was promoting the book, I was often asked what the impact of social media would be for religion. Should religion, should the Church, be engaged in

this sphere at all, or is it kind of damaging to the Church to be out in the Wild West of the Internet? And I always laughed when I got that question because it assumed that we had a choice at all, that we could either engage with this or we could stay away. My answer was always Pope Francis himself says that we need to be where people are; we need to get out into the streets and be with people. Now, that has a lot of layers and a lot of different meanings for sure, but for so many of us, where we are is on the Internet. We spend so much of our time in front of screens on our phones, computers, and if the Church, if faith leaders, leaders of Catholic organizations aren't there, we're not with people. And the people will keep doing what they're doing in front of their screens, whether we're there or not, so we have this opportunity to engage with them, to evangelize, to draw them into our mission, to communicate, to listen to what they have to say in ways that has not been possible, even a decade ago.

People would ask, “Can you really get much across in social media?” Whether it's Facebook or Twitter, you don't have a lot of space to get your message across, and some people think it's a bit shallow in the messages you can put out there.

So I went to the Gospels, and I looked at some of Jesus' most well-known sayings, such as, “Blessed are the poor for theirs is the kingdom of heaven.” They're all well below 140 characters. So my answer was always if Twitter is good enough for Jesus, who are we to say no?

Again, it's getting where people are, using social media, perhaps, in surprising ways. One of my favorite ways the Pope uses Twitter is to remind us to look up from our screen. For example, I might read one of his Tweets saying, “Engage with people around you,” as I'm zombie-like scrolling through my phone, and I look up for a minute or two.

Pivoting a bit from social media to agility, I want to talk a little bit about how Pope Francis engages the press. As a journalist, it's kind of a godsend how Pope Francis engages the press. Here's an example: for anyone who pays attention to papal travel, you know that there's a little bit of a routine now. The Pope will fly to his destination, and then on the return flight to Rome, he'll hold a press conference. Now, depending on your point of view, these are either a blessing or a curse because this is when Pope Francis is at his most candid. Just last week, for example, when he was flying home from Armenia, Pope Francis was asked by a reporter to respond to the suggestion from a German cardinal that the Church should apologize to gays and lesbians for past mistreatment. And the pope kind of got on board with it and said not only to them, but to women, to children, to exploited workers, to anyone we have not stood up for in the past, we owe an apology.

Now, this drew huge headlines around the world. Of course, anytime Post Francis kind of goes off script, it's great for journalists, but not so great for Vatican communications people because they're trying to clean up the confusion that

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*News is something that's new and out of the ordinary.  
That's what makes the headlines. So be surprising!*

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might be caused. But I think the press conferences where Pope Francis is at his most candid, they give us three lessons, especially as we think about how to communicate with the press, the people covering our organizations. The first is to be available. The fact that the Pope is willing to engage the press, even though it causes some work for his advisors, that's an important step and one that the Vatican has not always embraced.

The second is to be surprising. A lot of times, we get frustrated that the press doesn't cover our work because we're doing really good things and people should know about it, but that's, unfortunately, not the nature of news. News is something that's new and out of the ordinary. That's what makes the headlines. So be surprising! Pope Francis is always surprising during these press conferences, and the amount of coverage he receives is testament to that.

And a third lesson is to be human. It used to be that you could distribute a whitewashed, bland press release and hope for some coverage. It was all very by the book, done through committees. But that's not going to work anymore. Be human. Form relationships. Show that you know what your constituency or your flock is thinking about, and be willing to comment on those issues.

Coming back to the United States a little bit—that's what I cover, the Church in the United States—I want to highlight a communications aspect of a recent decision in the Archdiocese of Chicago, where I live.

The archbishop there, Archbishop Blase Cupich, who is a friend of Leadership Roundtable, announced a couple weeks ago that the Archdiocese would now offer

paid family leave to new parents, whether they are giving birth or adopting a child, to all employees of the Archdiocese. And this came at an interesting time because the Archdiocese is facing a lot of challenges financially. Parishes will be closing. Schools are closing, and this policy will cost a million dollars a year. So it was kind of a delicate balance to announce this great new policy while weighing the reality that the Church there is struggling.

And I highlight that not for the policy which, of course, is good, but instead because the Archbishop there is pretty good at this communications game. He realized that this policy, while great in itself, presented a huge opportunity for the Church there to tell its story. The announcement came through local Catholic media. It was picked up by local secular press. It was on all the TV stations, and then it kind of bubbled up to the national level too. There was an NPR feature interviewing Archbishop Cupich a couple weeks ago.



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*Be human. Form relationships. Show that you know what your constituency or your flock is thinking about, and be willing to comment on those issues.*

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I highlight this as an example of how important it is to have your communications people around the table with you when you're making strategic decisions. If your model is to make a decision and then hand it off to communications, you've already lost. You need to have people there explaining how your decisions are going to impact your ability to tell your story, to broaden your reach, to engage more people.

And as David said, this isn't something to play the press or play communications people to kind of build your own brand. Instead, it's a way to communicate your own message, which I think leaders of organizations have a duty to do.

One more example of a more local leader engaging his flock well, was following the shooting in Orlando a couple weeks ago. You might remember this happened early on a Sunday morning—very late Saturday night, early Sunday morning, so most of us woke up to the news. By then, several

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*We have to be able to respond in real time  
to what's going on in the world.*

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bishops, several faith leaders had already tweeted out or published on Facebook responses that, unfortunately, was to become a script in these situations, sending thoughts and prayers, offering condolences to victims. But I think the fact that that happened on a Sunday was very important because their communications teams weren't with them in most cases, but they were agile enough to respond to the news themselves, or they were confident enough to let the team they had put in place respond to that news. And I think that's very important, and again, it's because as leaders, we owe something to the people who follow us, and we have to be able to respond in real time to what's going on in the world.

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*Marketers are also looking  
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Another response came from the Bishop of Pittsburgh. So if you think of the Bishop of Pittsburgh, Bishop David Zubik, at all, you might think of him as being the lead plaintiff in the Catholic Church's lawsuit against the Obama administration's contraception mandate. Now, for many, that means he's squarely in one camp. He's a conservative. We don't have a lot of time to think through the nuances of many issues, so that's where he's going to be placed in our minds. But when he released

his statement, it was notable for a number of reasons. He was one of only a handful of bishops to call attention to the identity of most of the victims—most of them identified as gay—and he called for prayers for that community. He also talked about, at length, the need to adopt stronger gun control laws. I think for a lot of people who cover the Church, this was surprising because it showed that the Church does not fit squarely into this left-right divide that we have, so he was surprising. He raised some eyebrows, and I think, again, that's an important lesson for us here.

To wrap up, I would say as we think about our communications, we need to be available, be timely, be surprising. I think that's one of the most important ones, be surprising, and be on social media. And when you're on social media, follow me @MikeOLoughlin, and we can stay in touch. Thank you.

## Participant Comments

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**GEOFFREY BOISI:** I'm curious: What apps or social media networks should we be on? I mean, everybody sort of knows about Facebook and LinkedIn and some of the more—initially more prominent ones, which those of us in business realize that they're sort of passé now. What are some of the names of social media apps or communication mechanisms you are seeing that we as Church leaders should be thinking about using or interacting with in order to challenge the group in terms of our knowledge of it, and how do we go about finding out about these things?

**MICHAEL O'LOUGHLIN:** It's a good question, and it's funny because I'm 30 years old, but I sometimes feel incredibly old, like when I'm still trying to learn all these new apps, because it feels like the crowds are getting younger and younger on apps such as Snapchat and Instagram, and I'm trying to keep up on learning all those. I think it's still important to have a presence on Twitter and Facebook.

Twitter especially, I think, is underused because, in terms of press, it's an essential tool for journalists. That is where I get a lot of tips about stories, a lot of people responding to events that I then go to for further comments. So while it's kind of aging out and I think it's not as popular as it once was, it's still a professional tool that we need to be on to engage media.

And then there's things like Instagram, which is great for brands to promote

themselves and engage with users. Snapchat is, for those who don't know, an app on which you can send photos and stories to people, and they automatically delete themselves after the recipient views them. And this is increasingly popular with younger people.

So it's one of these things where you have so many resources, but you still need to be kind of on the cutting edge and experimenting with what's coming up next.

**DAVID MELANÇON:** Michael is exactly right. I think the one thing I'd say—and Michael is a millennial, right? So he's one of those illusive things that we're all looking for in the marketing world. We're looking for millennials. But, increasingly, marketers are also looking for the next generation, the tweens that aren't actually millennials, because everybody wants to reach them and talk to them.

I actually think you need to be on all these places. It doesn't mean that your message needs to be diffused or you need to be



Geno Fernandez

scattered. It means that you need to know where people are going today. You need to know what they're doing, and more than that—and I think what Michael is pointing out—is you need to know how they're consuming.

The thing about Snapchat that I find fascinating is that, yes, the images do go away, but it allows you to track your whole day. And anybody that's a follower of yours or a friend of yours gets to see quickly in images or videos kind of what you've done, and more and more young people are thinking about this. They're broadcasting their day to their friends, and they're looking at their friends' days. So understanding that this is the way they're consuming media is so important. Let's go to really old media. Let's go to TV. The fact that people are binge-watching, the fact that people are taking control and looking at what they want to look at, when they want to look at it is really important. So if you think about just the way they're consuming media and being there, I think it's important.

Facebook, they definitely get it. The people on Facebook are older. The people on Facebook are in their 40s and 50s. That's becoming more and more the prevalent user there. That's still a place you need to be. That's still a community that you want to talk to. So it doesn't mean you stop talking to them. It just means you have to be open to all these new ways to reach people.

**GENO FERNANDEZ:** I might take a slightly contrarian question to Michael and to David, since we have communications experts here. There is a theory that says that all of these types of social media are really limiting people's

ability to do critical thinking, and you quoted "Blessed are the poor in spirit" as the introduction to the largest, longest, sustained discourse in the Gospels from the Lord, The Sermon on the Mount. So it isn't 140 characters. It's four chapters, right? But, in a Snapchat and Facebook culture where you're consuming tweets, how do we actually engage with the more substantial method of the faith, which may take more than 140 characters and take lots of explicit reflection? Is it simply an entry point, and then that's how we get the crowds to do the serious reflection, or do you believe it's actually part of a new apostolate?

**MICHAEL O'LOUGHLIN:** It's a good question and a challenge for sure. One of my responses to this kind of question is I think it's fairly easy for a lot of people to write a lengthy essay or op-ed to try to get your point across. If you have several paragraphs, you can include a lot of sources and a lot of different viewpoints and a lot of different people's thoughts and ideas, and I don't think that's difficult, probably, for anyone in this room to do. I think it's a lot harder to cut through all the noise, to offer a few words that are going to stick with you throughout the day. We're constantly bombarded with information. When Pope Francis tweets something that sticks with me, I might think about it a couple of times during the day, and then when I have more time, look up where that line came from. And then maybe by then, I'm reading a longer document that he wrote, or I'm reading a piece of church teaching that he's pointing to.

So, I don't think that we can shift away from preaching the Gospel and doing our own kind of education about our faith and only follow people on Snapchat and Instagram

and Twitter. But I go back to my point that online space is where we are, where we live much of our lives. We can't reject that reality. We have to be part of it, and I guess we're still figuring out the best way to invite people to take a deeper look into things.

**DAVID MELANÇON:** I absolutely agree. I think it's way harder for anybody who's tried to write a tweet that's cogent. It's way harder to say something in 140 characters, but at the same time, I think you're addressing a bigger issue in our society, people losing sometimes the ability to focus, that ability to go deep and to really have the attention span necessary. In that way, you can use this as an entry point. It's not going to solve that problem. It's not going to make people start to read weighty tomes if they're 14 years old.

Does anybody know what Global Citizen is? Global Citizen is an organization that

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*One of Pope Francis' tweets is 'Look around you. Get your face out of the phone.'*  
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does a concert every year in Central Park. Last year, it was Beyoncé and Coldplay. We helped them launch their organization and their app, but what their app does is it allows young people, mostly, to earn points to get into a drawing to actually win a ticket to the Beyoncé concert. The tickets aren't for sale. You have to actually earn your way into the concert, and one of the things we found is that the way you earn that—in the marketing world, this is called “gamification”—is you have to go do something. In this case, we wanted them to engage with the UN's Millennium Development Goals, and we'd send out white papers on topics like women and

girls. And we would ask them to read that, and there would be a way, obviously, since they're reading on an electronic device that we'd know if they had read it before they got the points.

Now, does that mean they absorbed it? They just flicked through the pages? We don't know, but the good news about this media is that you can learn what people are doing. That's also the scary part, but you know where they've been. You know what they've read. You know what they've looked at. You know which points of your argument or your article they're interacting with, and therefore, you can either give them more of that, or if they're not interacting with the right stuff, you can figure out a way to re-present that to them in a different format.

I do think technology is a learning mechanism for us, certainly, as people who are trying to build organizations, and



I think that's the good of it. Addressing the bigger issues of how to make people more contemplative in this world, I'm not sure about.

**JAMES DUBIK:** As the dinosaur on the panel, I wanted to come back to Geno's question because I'm also an author. I write normally 750- to 2,000-word op-eds or essays. I've written quite a few, maybe 200 published essays and a couple dozen op-eds. At any rate, I find it very troubling that on the kinds of issues that I read about, generally national security issues, that the demand of the editors is less and less when the problems are more and more complex and find that the medium is enforcing less understanding, whereas the medium should enforce more.

So my conclusion from listening to both Michael and David in response is that we're not in an either/or world. You've got a variety of mediums that we really have to leverage, and we can't avoid or push back on the longer kinds of understandings and writings, or we will lose quite a bit.

**PETER PERSUITTI:** I'm struck by, Geoff, your thinking that social media is a little passé and what should we do, and I am encouraged by what Mike is saying about the surprising and the human aspect. And I recall years ago being a leader in an independent school in Connecticut where we had several students arrested and it was a crisis for us. And, quite frankly, we skyrocketed as a result and we became very proactive about drug abuse. And I suppose that if there's anything I would advise, it's that maybe as dioceses and archdioceses, we think about these opportunities for healing, for the human touch, and all of these crises are opportunities. They're windows, and I applaud the Pittsburgh

bishop for doing that sort of thing. The more you can be agile and start teaching out, the better, because unfortunately, these things are happening all the time, and we need voices of folks who can help us filter through them. And our faith is one of those great wells of hope, if you will. So just a thought in terms of the opportunity, even, for the Roundtable to be part of, to fill that void when these tragic events happen.

**DARLA ROMFO:** The other word that comes up for me with a lot of these apps is "narcissism." I mean, it's your whole life. You're showing everybody your life every minute, and that's exactly the opposite of what the faith is about. Everything about the faith is about silence and being self-sacrificing. I think it's interesting that one of Pope Francis' tweets is "Look around you. Get your face out of the phone." I'm just thinking about how we can be reflective. Instead of buying into and trying to be just like everybody else on social media, how can you do it differently, still be active, but do it in a way that's not narcissistic and that emphasis the way that we need to be all the things that were brought up in the previous question.

**MICHAEL O'LOUGHLIN:** It's a good point. I think you always have to be aware of what you're trying to do. Are you trying to build up your own brand, your own celebrity? Are you pointing back to yourself, or are you using—in the case of Pope Francis, are you using your celebrity to point to something bigger and better? So, for him, he has an Instagram account now, for example, and it's all pictures of himself. So is that narcissistic? Maybe, but it's pictures of him serving the poor, embracing the disfigured, being in places with refugees. So it's pointing to a bigger message. Do we live in a narcissistic culture?



Probably. But, again, I don't think we can separate ourselves from that where we risk not being in front of people where they are. So it's using this kind of technology in a way to point to the bigger message, but it is a challenge. I'll grant you that.

**DAVID MELANÇON:** I also think that we run the risk—and, Darla, I totally respect what you're saying, and given my age, I sometimes think it's very narcissistic as well, especially when I see some of the more popular people in addition to the Pope on social media. But I think we really risk something if we dismiss most of it as narcissistic because I do think the younger people that are spending time there, they're looking at it as a normal way of sharing. It's the way they're interacting. I'm not saying it's right or wrong, but it is an interaction for them that feels real. And so we have to get beneath that and understand that simple narcissism is not what it's about for a lot of the younger people that are on social media.

**GEOFFREY BOISI:** We have been spending a fair amount of time in our business trying to figure out how to reconcile what you've been saying here



about social media. Somebody said something to me a couple of weeks ago particularly in terms of trying to deal with millennials and the younger generation. We have, unfortunately, in a lot of ways, lost their trust, and what this guy was saying is they make decisions differently than we did. And when they're trying to comparison shop, they comparison shop among themselves. The other insight that I got was that it is narcissistic, but it's a self-branding culture. And the reason why you have so many younger people going to concerts and things like that and taking selfies is to prove to each other that they actually were there, and it's part of a self-branding thing in the way that they communicate and think about things.

And so if we want to regain the younger generation to the Church, we've got to learn about this, and that's not to say that we dumb down what we do. But we have to figure out how to do it differently, to engage them where they are and try to reshape that and deepen it and bring it up, but I have to say myself, in all of the businesses that we've ever been in, we've always tried to figure out how to use technology as a mechanism to enhance the mission and the business that we are in. And that's all we're really trying

to do here is to educate each other and to expose each other to that—both what Geno and you have said are an important part of the challenge. But I think what David and Michael have been saying is that we really do have to learn how the different generations learn and make decisions in order to figure out how to engage with them.

**BISHOP THOMAS DOWD:** A bit of personal history, I was the first priest in Canada to have a blog—and if you look at the back of my business card, it's got all of my social media contacts on it. So I really believe in the importance of this.

A little insight from my experience, if I may, and I think it touches on Geno's point and Darla's point. When the whole blogging reality started, it was very important for bloggers to know that they had people offering comments on their blog. They wanted whatever they put up there to initiate a conversation. When newspapers took over the blogging format, they started to use it with their newspapers. They wanted the same thing until they found out that a whole lot of those people put really nasty, disgusting, horrible things, and so you see a shift away from that. Either they don't do it at all, or they shifted to self-selecting groups,

like they use Facebook as the commenting medium.

I bring that up because there are really two ways I have seen of using the social media. One is to push out a message, and I have heard a lot of that discussed today, how we use it to get out our message, but the second is how to create a community around a message. So you can tell which way social media is being used depending, in my experience, on what kind of commenting possibilities you find. If the commenting possibility is we don't want it or we want it in the manner that we have to monitor the least, then it's really about pushing out a message. But when you see the person who puts up the original post, then moderating the conversation afterwards, you're actually creating a community of engagement around a particular message. It's extremely intensive, which is why once I was made a bishop, I actually had to drop that because I just didn't have the time in my calendar.

But what people are looking for is both truth and empathy. I think the communities that people build around Snapchat, showing their friends to each other, that kind of thing—how many times when there's a crisis, suddenly, the Facebook background image gets overlaid with the flag of France after the terrorist attack in Paris or what have you or Orlando, the rainbow flag? They are looking to build communities of empathy, and they're asking each other, "What should I think?" Very few people are saying why you should think it and actually engage the thought process. Like what Geno pointed out, how do you get people to start to think critically, I think you can in that medium but only if you're willing to invest in the ongoing conversation. If

it's about getting out a message and then moving on to the next message, then people will absorb it as, okay, this is yet another message that I am supposed to absorb and figure it on my own, and they do what everybody else does. They talk to their friends and say, "What do you think?" If, on the other hand, we engage the message, a bit like teachers engage a classroom, with empathy, bringing truth with empathy, that shifts the whole nature of the conversation itself. It becomes more like the cocktail party we had last night, where people wander around. They talk to each other. They meet each other, but they engage with each other. And so our social media effort, to the extent to which we see the difference between those two approaches, the pushing out the message will always be necessary because crises will hit, and people will want to know what we think right away. They're already processing through all the stuff that's happening. But to the extent to which we're trying to initiate a conversation, that's where we've got to be willing to stick around and keep the discussion going and keep animating that discussion.

So different tools are good for different aspects around that, but I think communities seeking truth with empathy, that's a key—I guess almost a kind of measurable you want to look at it, and, one of the factors I see is how we engage the conversation and comments. And I'll tell you, a lot of people read the comments. They won't read them if it's

full of bile because it's disgusting. They don't want to swim in that, but they will read the occasional angry comment if they see the angry comment there had a point. And what they look for is how you answer, and that's significant.

I'll conclude with one quick story. I wrote a blog post once on the whole process of marriage annulments, and, boy, did I get an angry response from somebody who had a whole crisis around that in his personal life, and it was really an angry comment. So I thought, "Do I delete it? Everybody will see that I deleted it. I'll have to explain why I deleted it. I might as well keep it up there, but then how do I engage it? How do I respond to it?" And the manner of engaging it actually affected people more than the engagement in some ways. They said, "Bishop, this person was hurting, but you engaged them in a way that was respectful," and most of the people who said that to me didn't say it on the blog because they afraid of him blasting them. They just sent me private messages. But I realized there's an invisible community around these issues. It's about taking what's under the service. There's an iceberg effect. We only see the top 10 percent, but the other 90 percent is there. That's the group we want to engage, but we've got to do it by engaging them. Thank you.

**THOMAS HEALEY:** I think the Bishop's comments was so thoughtful, I'm a little reluctant to follow after that. And I do want to change the topic a little

bit to branding and how does the Church brand itself, and indeed, who thinks about branding the Church, and who creates the brand? It's difficult, and the Pope obviously doesn't have time to do that. And the anecdote I would give you, last week I had the pleasure of taking most of my grandchildren on a Disney cruise, highly recommended to anybody who has grandchildren. But we went to an informal Mass last Sunday, and the priest who just happened to be on the boat with his family in his homily talked about branding. And he said, "Look where we are, and look at Disney and the brand that Disney has created, and look at Mickey Mouse and what kind of brand that is. And how should the Catholic Church think about branding? How can we, which is a much more powerful spiritual experience and world experience than Disney—how can we—can we learn anything out of that in terms of how we are perceived and how we create perception of the Church in the world, in today's world?"

**JAMES DUBIK:** Thank you for that comment, Tom. That is a perfect lead-in to our group table discussions. Thank you.

*We engage the message, a bit like teachers engage a classroom, with empathy, bringing truth with empathy, that shifts the whole nature of the conversation itself.*

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# Table Discussion

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## Themes from Table Discussion Question #1

### What do you identify to be the biggest challenge in communicating your mission today?

- Capacity for agile and robust communications and data analysis operation, particularly social media
- Difficulty conveying response to delicate pastoral situation (like a terrorist attack) or complex teaching in 140 characters or less
- Articulating mission and vision: Vision needs to be simple, as does the message about vision
- Devising a communications strategy that doesn't just reach millennials but older generations as well
- Not getting lost in the noise
- Creating atmosphere of welcome in communications
- Speed with which Church leaders are expected to respond to crises
- Internal control - who oversees/approves messages?
- Geography: the expanding nature of some dioceses and providing a coherent message to all constituencies

## Recommendations from Table Discussion Question #1

- Assume that everything can come to light, including business dealings, planning and even pastoral relationships
- Meet people where they are, and on the social platforms they are on
- Movement to new media doesn't necessarily mean sunseting of old media (eg parish bulletins). We need a strategy, not just a new technique.
- Pope has great tweets and internal controls around social media communications. Why reinvent something when you can retweet him?



## Themes/Recommendations from Table Discussion Question #2

### **What strategies have you found effective in your organization for institutionalizing best practices?**

Engage those around us, do not wait for them to come to you

Fostering communities of trust and empathy, including online, are what encourage the building up of the Church

Invest in better systems of management

Involve communications team in discussion/decision-making process and on core leadership team.

Promote the candidate (Jesus) and they will join the party (Church)

Creative destruction helps create an ecosystem where venture capital is used for the emergence of good ideas



2016 ANNUAL MEETING

*The Francis Effect and Changing Church Culture:  
Advancing Best Managerial and Leadership Practices*

June 29–30, 2016

Inn at Penn,  
Philadelphia, PA

[leadershiproundtable.org](http://leadershiproundtable.org)

## From the Vatican to Washington, DC: a Commitment to Best Managerial Practices and Financial Accountability

**Geoffrey Boisi**, *Chairman and CEO, Roundtable Investment Partners*

**Danny Casey**, *Director, Office of the Prefect for the Secretariat of the Economy*

**Elizabeth McCaul**, *Partner-in-Charge, NY Office, Promontory*

**GEOFFREY BOISI:** I want to thank you all for being here, and I particularly want to thank Jim Dubik for his leadership in succeeding me as Chairman. He's done a fabulous job, and you can tell from not only the insight, but the commanding presence and the way that he has energized and taken this organization to the next level, I think the Catholic Church in the United States and around the world is going to be benefitting from this for many years. So, Jim, thank you so much.

We are really blessed and privileged to have today, in my opinion, two of the most influential lay Catholics in the world today and particularly as it impacts the temporal affairs of the Church around the world. For the next hour or so, we're going to engage in a conversation with the two of them based on the experiences that they've had over the last several years.

First, we're going to hear from Danny Casey, who is in Rome today.

Danny is someone that I've gotten to know over the last several years and have tremendous regard for. He's had a lot of experience in the business world in terms of the energy business, the accounting world, the insurance world, and the legal

world. And for the last 13 years, he has served the Church in a number of critically important ways, working with Cardinal Pell when Cardinal Pell was the Archbishop of Sydney in Australia and then for the last several years in the Vatican in terms of executing on the transformation of the temporal affairs of the Church at the Vatican and, as we'll hear, how it hopefully



Geoffrey Boisi

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*What is not measured is not managed. The Church has got no excuse for not being precise about its measurement.*

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will impact the rest of us around the world. So he is a tremendous talent and a great human being and someone, I'm sure, we're all going to enjoy hearing.

The other person is Elizabeth McCaul. I've known Elizabeth for 20 years now, and she not only worked at Goldman Sachs, but she was the Superintendent of Banks for New York and in that responsibility oversaw literally trillions and trillions of dollars, of capital of some of the major institutions of the world, and particularly after 9/11 was instrumental in getting the financial system back up working from a supervisory standpoint. And for that as Americans, we should be really thankful for the work that she and her colleagues have done. Elizabeth is currently the partner in charge of the New York office of Promontory Capital, and Promontory was engaged by the Vatican in the early stages and up until really recently in terms of the transformation of the compliance side and helping give advice on how to structure many aspects of the transformation that Danny and she will talk about. She's a great friend, a great Christian and is a fellow parishioner.

So, with that, Danny, perhaps you could kick us off and educate us as to what's been going on in the Vatican.

**DANNY CASEY:** Thank you, Geoff, and thank you everybody for having me here today.

People have often said to me, "How did you get to do what you do? How did you end up here doing this?" and I have to say,

on occasions, I've found myself asking exactly the same question.

What I thought I'd do today is paint a little bit of a picture of the journey from Sydney, and how it relates to the journey here in Rome. I think Elizabeth is going to cover very well the sort of mechanics and details about what has been done in the wonderful work that she and her colleagues did in 2013 and 2014 and a little bit beyond.

One of the first things I want to reflect on is an interesting article that the Cardinal and I have widely quoted around here in the Vatican, and it was an article that appeared in one of my professional journals, and it was written by Jacob Soll, who is the author of a book called *The Reckoning: Financial Accountability and the Rise and Fall of Nations*. As an accountant, which is where I was originally trained and probably still am, this is not some plea for relevance about how important that profession is. It's actually a pretty interesting analysis of just

how important financial accounting and management reporting is.

There are a number of points made in this article. One was that good accounting builds stronger societies, and poor accounting actually leads nations astray. Greece was actually seen for the first few years of its membership of the EU as the star performer, outperforming everybody else in the EU, until more accurate financial reports started to emerge in 2009 and people started to see more of the reality. Louis XIV refused to replace his top accountant, and by the time of his passing, France was broke; Soll argues that may well have been one of the causes behind the French Revolution. But another message to draw this together is that poor measurement and inadequate accounting have contributed very much to some of the current challenges that we face by disguising debts and deficits in governments. One of the key conclusions that is also emphasized is that what is not measured is not managed. If there was one point that comes through in our discussion today, that is the Church has got no excuse for not being precise about its measurement. The Church has absolutely no excuse for not knowing where it is, and what I'll paint for you is a



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*What gives us the right to be sloppy in our administration? We're entrusted with a patrimony that's not our own.*

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bit of a picture of the journey where I think we've made an interesting contribution to helping that happen.

It was around 14 years ago that I was first asked by a headhunter to consider putting my name forward to work with Cardinal Pell in the Archdiocese of Sydney. I had worked with many organizations. The Church just wasn't on my list, and I said to the headhunter, "Look, I'm not really that interested." And he said, "The job is made for you. You'll love it. You'll stay there for many, many years." I said, "Every time you've approached me over the last 10 or 15 years, you've told me the same thing." He said, "But this time, I mean it. This time, I really do. I'm telling you the truth." He persisted, and I decided to throw my hat in the ring. And after my eighth or ninth meeting, I was having a one-on-one with Cardinal Pell, and the Cardinal said to me that he wanted to create this role of the business manager, the first layperson to hold the role in Sydney as a business manager and the canonical financial administrator. He said what he wanted us to be, fully acknowledging we weren't a business, was businesslike in the way we administer our affairs. He said, "I think that we need to be striving for far better business administration, business performance."

I said, "Well, what are your benchmarks? What sort of standards do you aspire to?" I had images of the Church and the Leaning Tower of Pisa as a classic example of where things can go wrong, and Cardinal Pell said, "My benchmark is at least as good as the very best." Now, I was stunned with "at least as good as the very best" as a benchmark, and he said, "Well, I want my business manager to be able to deliver that for the Church." So I said, "That's one heck of a high standard to set." He came straight back to me, "Well, think of who we are. Think of who we're working for. What gives us the right to be sloppy in our administration? Why shouldn't we negotiate well and hard like everybody else does in business? We're entrusted with a patrimony that's not our own." We then went on and chatted about a number of things, and some of this conversation of many years ago had enormous impact on me.

The obligations we have in the Church and administration are extreme. We don't just have obligations to people we serve today. The Church is eternal. We actually have inherited much from the people who came before us, and they're watching from the Church eternal as to how are we, the stewards of today, administering ourselves.

But we go on. If we don't do a good job today, we compromise and make life more difficult for the people that follow us. So we actually have stakeholder management through time, which is something that I've never encountered in my corporate life. I tried to look after the shareholders of the day. I tried to make our companies

attractive so that people would pay more to be a part of it tomorrow, but I never worried too much about those who sold out yesterday. They're off my radar at that point in time, but not so in the Church. So, when I started in the Archdiocese, we had some considerable work to do. We had around 600,000 Catholics, 135 parishes, 10,000 staff, and 1 in 5 children in Sydney went to one of our schools, 1 in 10 people were in one of our hospitals. We had 2,500 people working every week as catechists teaching the faith in government schools and a range of other support and welfare programs that we had in place. We had a central treasury with hundreds of millions of dollars invested of agencies' funds, and we used to put that out on the market and managed liquidity through the whole Archdiocese. And while there was nothing particularly improper about the way it was administered, it was not as efficient as it could have been. It could have been done better. We didn't have the skills and experience that we needed. The whole market had moved and demanded greater skills than what we had before. It became very clear to me why the Cardinal had felt that he wanted to find qualified lay people to sit as his advisors.

As we went on over the journey, we started to concentrate on a number of different areas. We started to look at procurement practices. We developed standards for how we would contract with suppliers of goods and services. We included the introduction of Catholicity clauses in many of the contracts that we put out, which actually opened up a dialogue about why the Church believes what it believes. We took the view, as we must, that we're Catholic 24/7. We don't actually set it aside when we're trying to do a business negotiation. We have an obligation to live by the teachings of

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*There is nothing inconsistent between Church teaching and good business practice.*

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*Money may be seen as a tainted thing, but the Church does need it to do its good works, and those of us who are entrusted with administration of that have a very special and heavy obligation.*

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the Church and have got no right to be conducting administration in a manner that is contrary to Church teaching.

I think the other thing we might emphasize, is that there is nothing inconsistent between Church teaching and good business practice. The thing we did was establish a Business Network of business leaders, because we actually feel we have a right to a seat at the table, and we also felt that we had an obligation to reach out to leaders who may not have had the formation and to discuss these sort of issues with them. And what you start to realize is that there are a whole lot of business leaders and government leaders who are worried about the next generation, who are worried about where things are, and they weren't aware of the voice of the Church in many of these areas.

We particularly focused on "lazy assets." We looked at areas where we felt we weren't getting a return. We had a binary approach to assets that are either involved in the mission or that were involved in generating commercial return for the mission. There was no hybrid position. It was one or the other.

Now, if there was a decision to use some of the commercial returns to support a pastoral activity, that is a separate decision to what happens to the return on an asset. If you start to blur things and allow for a lack of precision, you can't measure performances as accurately as you might need to. So we unlocked income streams, and the whole plan was to try and build up effectively a sovereign

wealth fund that would generate regular income, that would underwrite programs. At the end of that 10 or 11 years together in the Archdiocese, we had more than doubled the value of our net assets, not by taking over other dioceses, but by working the asset base harder. But more importantly than that, we had increased annual expenditure on good works by 250 percent per annum. This was a substantial lift over time and left behind a diocese that was much stronger, and had much more capacity to do good than perhaps the one we inherited.

We also hosted the Holy Father for World Youth Day. We built a retreat center. We built a pilgrim house here in Rome, a range of different new initiatives that would not have been possible if we hadn't have taken control of the business administration. Money may be seen as a tainted thing, but the Church does need it to do its good works, and those of us who are entrusted with administration of that have a very special and heavy obligation.

Now, in 2014, the Holy Father announced reforms and called Cardinal Pell to Rome.

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*The main objectives of the reforms were to provide a consistent set of financial management policies and practices across all entities because it was not consistent in the past.*

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Elizabeth will outline the work that was done and the reasons behind it, so I won't go into that too much. But I will pick up a few points and talk to you a little bit about the work we've been doing in the last few years here, which is built upon the wonderful groundbreaking work undertaken by Elizabeth McCaul and a number of other extraordinarily dedicated people in 2013 and 2014 in particular. Some of the key findings were to establish the four-eyes principles in the way in which we work here in Rome, to separate the concentration of power that had emerged in the Vatican over a number of years, and to devolve authority to local levels with appropriate accountability, to adopt international standards in the way we conduct ourselves and our reporting.

The main objectives of the reforms were to provide a consistent set of financial management policies and practices across all entities because it was not consistent in the past. It was to facilitate decision-making at a local level. How can we hold people accountable? How can we actually ask people to develop plans when we've got no way of measuring progress towards those plans or the resources they have? Strengthening the planning process was an important aspect of the beginnings of our work, which we initiated in 2014. And why are we doing all this? Not just for the wonderful nature of sound professional standards, as good and meritorious as that may be, but because we want to make more resources available for the good works of the Church, and especially for the poor. If we leave money on the table at a negotiation because we haven't got the courage to argue for it, or if we cut corners in the way in which we tender or if we don't demand performance on the way we use resources, then someone is missing out. As Cardinal Pell said in Sydney, our philosophy is to maintain the asset base in

real terms, and spend every other dollar or euro here that we make doing good work. We've got no right to steal from the future. But, by the same token, we've got no right to leave money idle when it should be working to do good.

The new principles are applied to all entities and are consistent with relevant international accounting standards. Furthermore, the Secretariat has to support entities in change management, and commenced training programs here in late 2014. And it has been well publicized that 1.4 billion of assets was uncovered once we insisted all assets had to be reported.

Now, people knew that this gap existed, and none of us has ever suggested that it necessarily meant that it was skullduggery behind the scenes, but what it certainly was, was a lack of visibility about the way things are being managed and perhaps a lack of opportunity to leverage scale in the way certain investments were being made and transactions are being incurred and now on the books. But, on top of that, we have a much more complete list of entities here, because not only did we have assets off the books, we had entities that existed that weren't included in the consolidated financial statement, so two elements that had a lack of visibility have now been corrected.

If there's one thing that we're more confident about, we've got a much better handle now on where we are. We've got a much more complete list of entities, and we've got a much greater visibility, in fact, almost complete visibility on the assets and investments and liabilities that entities have.

Another thing we did was introduce the custom of signing the declarations of

each of the financial returns, and while some people managed to forget to sign once and even twice and in one case three times, we started sending things back because we wanted a declaration of completeness, again, as part of the whole question of governance and accountability that people have as stewards of Church resources.

To do all this, clearly, it required a massive effort in change management, communication, and training, and it is a long, long journey. This is all a big part of what the Secretariat is putting in place. We are building front-line, level one controls and procedures in high-risk areas, ensuring separation of duties, ensuring consistency of practice from one dicastery to another. We are also then using the whole control of vigilant structures to help engage with people about budgeting and planning.

We introduced a new budget process that started with a dialogue about what you do and what you hope to do. Before we get into any numbers, let's talk about plans. Let's talk about achievements. Let's talk about how we manage success. How else do you ration finite resources if you're not certain of the merits or how they are proposed to be spent? And if someone wins a bid for resources, then they won at the expense of someone else, so they have an enormous responsibility to deliver what they have promised. So the notion of a budget of being not solely an accounting exercise, but being a management plan or promise to the Holy Father, has been introduced as the basis of our budgeting process.

We have adopted IPSAS as the international standards, and we will transition to that over several years. Now recognizing we are a sovereign and not a corporation, we've used IPSAS, the Public Sector Accounting Standards, which are uniquely shaped around the special needs and accountability framework associated with public entities.

We developed financial management policies to underpin our work and to guide the various entities, so we summarized IPSAS down into a smaller set of financial management policies, the first set of integrated policies ever developed. And with that, we deployed a new budgeting process to get a much more precise estimate of existing activities and where things are.

Apart from accounting and budgeting, we've started to look at policies in other areas; in particular, two things of great interest are ethical investing and slave or forced labor in our supply lines, two particular areas where we think the Church and the Holy See in particular needs to take a leadership position. And many, many Church entities and others have done wonderful work in this field, and we're engaging with people about this so that we can look towards reshaping our practices in this area and then perhaps provide through some moral authority and leadership recommendations for how these issues might be dealt with.

One of the other initiatives that Cardinal Pell has always felt strongly about is

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*We are building front-line, level one controls and procedures in high-risk areas, ensuring separation of duties, ensuring consistency of practice from one dicastery to another.*  
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developing the talent base here in the Holy See. Clearly, as you transition from one model to another, there's going to need to be a significant injection of external talent to help facilitate the change process. But our hope and ambition is that we can also develop the skills internally through that process, and we've recently started with the support of Georgetown University, a leadership development program for middle managers to start to unlock potential and to start to help develop critical thinking and other aspects that they haven't been given before. These things have not been put in place here in the past, and Cardinal Pell is very committed to making certain that we do all we can to grow the skill base.

The task we're doing is not optional, and the task you're doing as Church administrators is not optional either. We owe it to all we serve to implement best practices in administration. It doesn't mean we're a business, but there's no excuse for not being businesslike. And once you start on a journey, there's no turning back. The hardest thing about learning the rules of a new game is forgetting the rules of the old game. And so we need to constantly reinforce the learnings of the new game, and this is a long-term project we're engaged in here at the Holy See.

It's important to note that a small improvement in efficiency or investment practice can make an enormous difference. So many more people can be helped and, for instance, are being helped in Sydney as a result of the work we did from some of the negotiations that we had when we unlocked potential and value that was latent in the balance sheet. I don't know how many more people were reached. I don't know how many more poor we reached. I don't know how many

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souls we saved because of that work. But what I do know is the Archdiocese has got much more capacity to underwrite more robust programs over an extended period of time than it had when Cardinal Pell and I joined.

Transparency with regards to meeting international standards is a very good benchmark, and for us, transparency is coming. Whether we like it or not, it is the way of the future, and it needs to be. What may have happened in the dark will be seen in the light, and so we need to be ready, and we need to be clear, and really to ask questions. If we're ashamed of conduct, then we better be asking questions about why we've allowed that conduct to occur.

As I said, the Church is not a business, but it needs to be businesslike. So the starting point of our journey was about drafting principles based upon the wonderful work that have been done by the Commission for Reference on the Organization of the Economic-Administrative Structure of the Holy See (COSEA) and their advisors. With those principles, we developed policies and plans and set priorities to implement change and to take people with us. It's in the early days still, but by any measure, we think we've made a good start. Cardinal Pell says that the ambition we have, our target, is to make us boringly successful, to take us out of the media, and we're certainly doing our best to reach that goal.

**GEOFFREY BOISI:** Danny, thank you so much. What we're going to do now is have Elizabeth speak, and then we're going to have questions from the audience for both of you.

**ELIZABETH MCCAUL:** Danny, you are a brave, brave man. I know very well how hard your job is, and thanks for telling all of us today about some of the specifics of what you've been able to do. And His Eminence would not be able to proceed without you on his right hand, I'm 100 percent sure, so thank you.



I'm going to talk about some of the history and explain in a bit more detail what some of the reforms are. My role was really as a servant, in Church language, to be an advisor and to use my skills as a lay person to assist the incredible efforts that really are undertaken by the Holy Father, Cardinal Pell, and Danny Casey, and recognizing that whatever each of

us can contribute, we're supposed to do that in our time. And this moment was something that I was certainly trained for and had a chance to do.

I will take you back to those dark days before the light of 2013 and remind all of us that when the Papal Conclave met in 2013, there was a crisis of confidence in the Church. This was born of the real lack of transparency, the continuing, very negative news that Danny is referencing, the stuff of the front-page news journals around the world and continual drumbeat of problems that were occurring from a lack of controls, of transparency, of adherence to international regulatory practices, of observance to standard financial practices that are there to create confidence. These are just some of the headlines, "Three arrested in Vatican Bank scandal," "Vatican Bank director, deputy resign amid scandal," "Vatican Bank faces fresh money-laundering scandal," "JPMorgan closes their accounts." This is what was happening to the sovereign entity of the Holy See; there was a closing of the world's doors from a financial point of view, and that meant that the trust was not there in terms of their ability to control the access to the use of the financial system, such that it wasn't being used for nefarious purposes, terrorism financing wasn't going through the accounts, money laundering wasn't going through the accounts. And, frankly, the message that was there was exactly the opposite. So almost immediately after the Holy Father was elected as Pope, he identified financial reform as one of his top priorities, and it's no accident. The reason to address that as a top priority was to really get underneath and into the weeds and fix and make transparent the issues that were occurring in the Vatican so that confidence in the Church and the very important work of the Church to serve the

poor, to spread the good word would be allowed to continue.

Danny said it very well that this is about doing your job well now, so that in the future, the good works of the Church can continue around the world, and we were really at an inflection point at that moment.

The Holy Father immediately established a pontifical commission to harmonize the mission of the Institute for the Works of Religion (IOR), commonly known as the "Vatican Bank," with the Holy See. He set up five members of this organization called Commission for Reference on the Institute of Religious Works (CRIOR) to study what it was doing and to really set it on a much more positive course. The idea of this CRIOR was to collect documents and information, get management to cooperate so that they could get underneath what was actually happening inside the IOR, and then present the Holy Father with a plan that would ensure that the Vatican's financials going through this part of its structure would be pristine, and that doors to internationally active financial services institutions around the world would not be closing because if those doors shut, the funding activities and the serving the poor could not continue.

The Holy Father also enlisted another commission and set forth COSEA, and Danny referenced this as well. COSEA was put in place to look at the entire organizational and economic structure of the Holy See and to make sure that the government itself was set up so that it had the appropriate administration, checks and balances, governance and accounting. Ultimately, COSEA released a report setting forth the Minister of Economic Affairs, and this was, of course, Cardinal Pell's role, which was not in existence at all inside of the Holy See. It was not

a separate economic framework for the Holy See that was in place at all.

He set forth through the work of COSEA to strengthen the legal and the institutional frameworks, with the real role of aspiring to move toward internationally accepted practices. That seems like a low bar, but the bottom line is there was no framework in place to coordinate with the regulatory structures, and in fact, we had government agencies from outside of the Holy See bringing into question the finances of the Vatican and putting forward reports that ultimately led to the closure of accounts in Italian banks and the access for European banks being closed. They ultimately found in the beginning that the Vatican was not in compliance with standards and regulations aimed at preventing money laundering or standard processes for ensuring that the people running those things had appropriate skills, appropriate authorities, or even that there was a regulatory framework in place to govern that overall process.

So the Financial Information Authority (AIF) was created. The AIF is a regulatory agency just like the Federal Reserve, for example, where it has oversight over the bank and the financial institutions inside of the Vatican, and it has set forth under the leadership of René Brülhart, who was brought in as a layperson to lead that effort and to put in place structures that would match the best in the international markets. Why was that important? It was the fundamental piece that led in the end to the bank not having to shut its doors; it was able to access funding because it had a recognized regulatory framework. René Brülhart, by the way, was a crisis regulator, very well-known across Europe; he was also brought in to Lichtenstein when the doors to the agencies and financial services institutions in Lichtenstein were being closed.

# Pope Francis Strengthened Legal and Institutional Frameworks by Fostering International Cooperation and Transparency.

The Financial Intelligence Authority ("AIF") is the competent authority of the Holy See and the Vatican City State for supervision and financial intelligence for the prevention and countering of money-laundering and financing of terrorism.

In 2014, AIF signed Memoranda of Understandings with multiple countries to formalize the cooperation and exchange of financial information to fight money laundering and combat terrorist financing across borders between the competent authorities of both countries.



*"With the introduction of Regulation No. 1, we have completed the prudential supervisory framework of the Holy See and Vatican City State. By signing Memoranda of Understandings with other Financial Intelligence Units of 13 countries, including Australia, France and the UK as well as with the Regulators of Germany, Luxembourg and the United States of America, we have also massively strengthened international cooperation."* René Brüllhart, President of AIF

## AIF's performance indicators help display the success of the Holy See's financial reforms...

Indicators of Financial Crime Prevention and Operational Performance	2012	2013	2014	2015
Suspicious Transaction Reports Received	6	202	147	537
Cases of Bilateral Cooperation between AIF and Foreign Authorities	4	81	114	380
Declarations of Outgoing Cash above EUR 10,000	1,782	1,557	1,111	1,196
Declaration of Incoming Cash above EUR 10,000	598	550	429	367



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On the slide above, you see some boring data, but I want to make it not so boring for just a minute, because it's extraordinary that we even have this type of a report. Anti-money laundering efforts require that you have controls in place and that you're able to detect the potential for suspicious activity. If you look at 2012, the number of suspicious transaction reports filed was six, and then you can see what happened as the whole system was built out and computer programs with scenarios were put in place. The reporting numbers increased in 2015 to 537. Now, that's not an indication that there is a huge amount of increasing bad activity. It's, rather, an indication that they have the ability to look at variances that need to be observed

and make sure that they're okay. This is fundamental to being recognized as an institution that operates with internationally accepted practices, and you see on the bottom the numbers about the cash. And Danny was very articulate in saying, "Do we have to tell everybody about the cash that we're operating in?" It's required to have reports in place, currency transaction reports, for cash that's going in and cash that's going out so that you ensure that your economy is not being used for nefarious purposes. It's not a tax avoidance location. It's not a money-laundering haven. So these checks to have these reports put in place, people know now that there's cash that's being used, and you have to indicate what it's being used for.

This is a quick snapshot of the incredible work that has been done by Cardinal Pell and Danny Casey and many others and with the Holy Father ultimately adopting a significant new legal regime inside the Holy See. Beginning in 2013, new laws on anti-money laundering were adopted, moving towards the requirements for public balance sheets and accounting standards, and ultimately resulting in treaties being signed for tax purposes with important neighbors, such as in Italy, which mean that they are increasing as a matter of law, the transparency that's required within the government and within the banking institutions.

# The Reforms Provide a Roadmap for Achieving Success and Changing Public Perception.

## Transparency



## Quality



## Governance/Risk Best Practices



## Sustainability



## Regulatory Compliance



After reviewing the reforms with you, I thought it was a useful exercise to look at the news headlines as some of this work began to take root and grow. I've organized some of these headlines into what I think are the key pillars of the reform, seen above. On transparency, one headline read: "Shining a Light on the Vatican Bank and its Financing." You see headlines about the Vatican closing the book on the financial practices from the Middle Ages. Another featured regulatory compliance with the Holy Father himself on the front page of the newspapers with the headline, "Vatican Bank Agrees Landmark Tax Treaty with Italian Regulators." On the subject of

quality there was a look toward accessing the very important resource that the Church has, which is in part its lay people that are expert in some of these areas and looking across the clergy to find people that are really trained in these areas and who can contribute. Naming Cardinal Pell, bringing him from Sydney, and the good work that was done there with the business management skills, bringing him in to run at the whole new structure to provide much more transparency and sustainability was one example of this. And the final headline shows that the ways the reforms are ultimately adopted that the days of ripping off the Vatican are over. If you got one

message from Danny it's that they're going to negotiate hard, they're going to negotiate clearly, and they're going to do that because they understand they are here to serve the poor.

I think it's worthwhile, in your parishes, dioceses and religious organizations to think about what these five tools—transparency, governance, regulatory compliance, quality, sustainability—really mean.

**Transparency** means, in your own organizations, conducting comprehensive reviews, reporting to relevant stakeholders, and at the parish level,

presenting information about the financial picture in a very comprehensive way.

**Governance** and risk best practices means having checks and balances in place so that if mistakes are made we don't have to think that there is bad behavior necessarily, but even just catching and correcting mistakes so that the appropriate reporting can take place up to boards that are qualified and understand the issues.

**Regulatory compliance** may be the most boring words on the planet, but today are strategic. What you see is that the regulators around the world have realized that whether you're a charitable organization or worldwide international bank, you have to have regulatory compliance in place in order to be able to operate. And why is that? If we just think about the financial crisis and we move away from the Church, what we understand is that there's a crisis of confidence even in the financial services

sector broadly, so there has been a plethora of regulations that have been adopted, aimed at making the processes inside the banks much stronger, to create more confidence in them.

**Quality** means bringing in people who are qualified, have accounting backgrounds, have communications background, understand, with expertise, been trained for 20, 30, 40 years to do a job that's needed by the church.

## Five Key Areas of Learning Can be Discerned from the Vatican Reforms.



1

### Transparency

- Conducting **comprehensive reviews**, reporting findings to relevant stakeholders and being **fully transparent** with results at each stage of the reviews, creates credibility.

2

### Governance/Risk Best Practices

- Good governance relies on a system of **checks and balances**, **segregation of responsibilities** and **introduction of independent structures**. Adopting policies and procedures that comport to international standards promotes governance best practices.

3

### Regulatory Compliance

- Close adherence to regulatory requirements is **good business**. Regularly **review and update key policies and procedures** and **keep abreast of developments**.

4

### Quality

- **Hiring and retaining of professionals and outside experts** with relevant and robust experience is vital to business and operational quality.

5

### Sustainability

- **Success is synonymous with sustainability**.

And finally, **sustainability**, because, at the end, success is not going to be achieved if there is not a sustainability component there. It will just be a couple of years of history and it won't be there for our children and for the poor.

The first balance sheet that was published and provided to the public and the regulators, first ever, was in July of 2014. That's a landmark. It means that these reforms are real. And I'll say this—what I want to do today is just bear witness to things that I know have been done and are being done on a regular basis, and that we can have confidence in.

Reforms also took place at the Central Bank, known as APSA, and COSEA performed a whole governance review, so that those structures are being put in place. It's morally wrong that a leader of the Church disregards the accounts because they say they do not understand money. We have to understand the money because that's how we'll create confidence in the populations that we need to serve.

Part of the work that we did was to do an anti-money laundering and anti-fraud review, down to the very meticulous, very detailed, in-the-weeds, looking at every single account. We had 35 people there, sitting and looking through every single account; they gained access to every single one and were able to put the right standards in place that are expected internationally.

Various laws are now in place for regulatory compliance, the *motu proprio*, Law 18. These are significant milestones

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*It's morally wrong that a leader of the Church disregards the accounts because they say they do not understand money. We have to understand the money because that's how we'll create confidence in the populations that we need to serve.*

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in the international world. And here's that point about quality. It's people, at the end. Are the people qualified? These are just some of the reformers, and Danny, you're right there, right below Cardinal Pell, with a significant background. That means that we can have faith and trust in what you're doing and know that the Vatican is on the course to have a very tight ship, and that's what we need in order to be here, around, relevant, and able to serve the poor for a much longer period of time.

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*The first balance sheet that was published and provided to the public and the regulators, first ever, was in July of 2014. That's a landmark. It means that these reforms are real.*

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Joseph Zahra was the head of the COSEA Commission. He was brought in as a financial expert to run that commission. It was populated with people from all around the world—investment managers, former Central Bankers from Singapore, et cetera, to look at and study the issues, and correct them. Jean-Baptiste de Franssu

is an asset manager by training for many years, head of the European operations of a major asset manager, currently running the bank. René Brülhart is the President of the Regulator. Ernst von Freyberg, the first President of the IOR, under whose leadership many of the account were cleaned up. And we were the servants, the outside advisers, to COSEA, in the first place, to help them put their reports together, but then, secondly, to do the real roll-up-the-sleeves work and put those 30 people on the ground to make the cleanup.

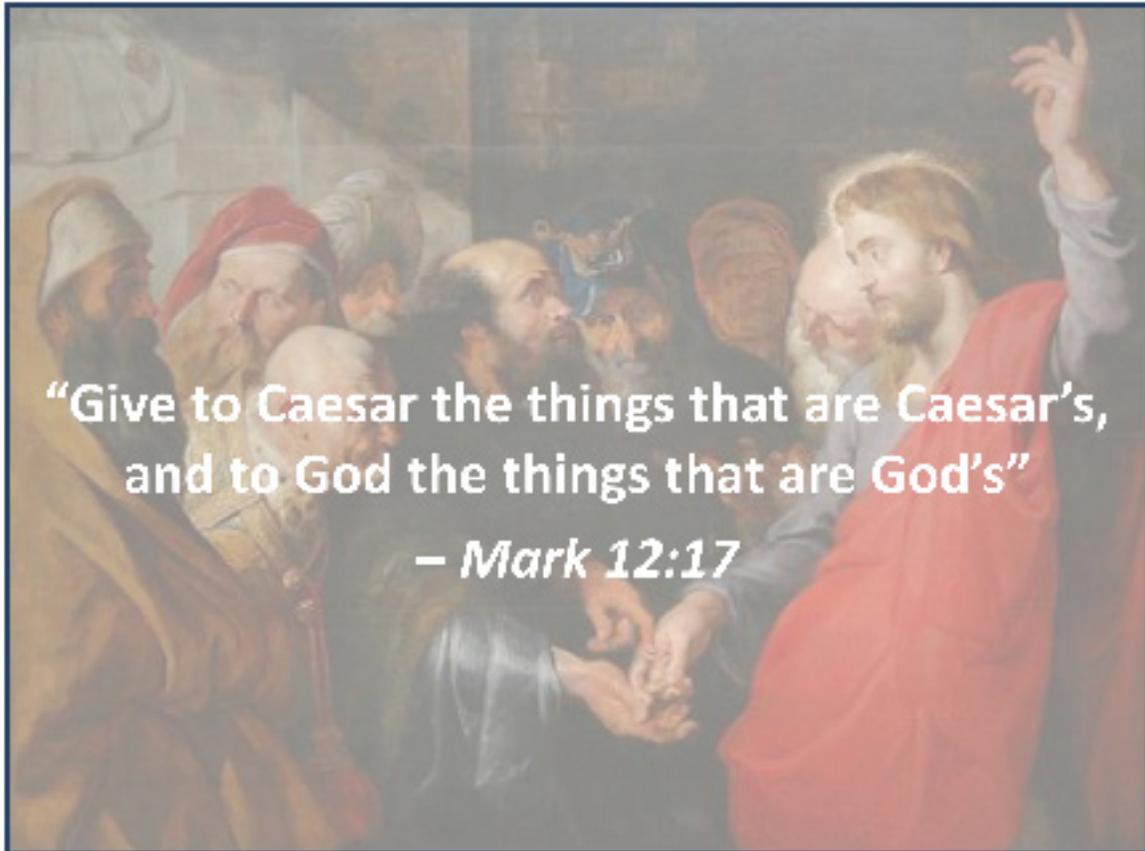
The last point here is to bear witness. Part of our engagement was to make sure that once we did the work—and we're not a lobbying firm or an advocate—to bear witness to its accuracy, to its meeting the international standards, and to be able to tell key stakeholders that are in the lay world, like other banks and regulators, that this is a clean shop.

These buildings blocks—transparency, best practices, compliance, quality—are all designed to achieve sustainability, and they have to be continually renewed. The best practices with the four-eyes principles and compliance is a strategic matter, and need to be there to continue to respond to the changing environment.

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*Part of our engagement was to make sure that once we did the work to bear witness to its accuracy, to its meeting the international standards, and to be able to tell key stakeholders that are in the lay world that this is a clean shop.*

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*The “Render unto Caesar” is something that was always a reminder to us as we were doing our work, that there’s a higher authority and that we’re doing the work for the longer term.*

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The image above is a painting that is hanging in the office of then President of the IOR, and it’s just an interesting thing for you to know. It wasn’t a normal assignment. There was certainly a lot of resistance. So when we showed up with our international team to start to go through the accounts, there was nowhere to sit, and there were no computers available, or the electricity couldn’t handle the computers. Finally, the President of the IOR said,

“Well, I have a very large office with this beautiful painting in it. I can take this closet office down the hall.” And that whole team of 30 people set up in his office, and we worked under this painting. The “Render unto Caesar” is something that was always a reminder to us as we were doing our work, that there’s a higher authority and that we’re doing the work for the longer term.

The slides below are some take-home things that, in your organizations, you can look at making improvements and reforms like the Holy Father did. I've put together four of them on the risk management side, with how you can achieve some of the same changes, with some specifics of what you can do, and also on the governance side, with focus on the roles and responsibilities and the oversight.

The bottom line is that the Vatican reforms really have set a precedent, and this is precedence that's being put together at a moment when there's a tsunami of regulatory change taking place. All around the world financial services firms and charitable organizations are being asked to do their work at a much higher standard with much more process and control put in place, and the Vatican is no different.

## To Achieve Best Practices, Financial and Charitable Institutions Can Adopt Key Risk Management Principles...

Risk Management Principles	How Can This Be Achieved?
<b>1</b> Risk Framework and Profile	<ul style="list-style-type: none"> <li>Define risk and adopt the definition across the entire organization</li> <li>Develop a risk management framework and articulate a risk appetite that aligns with organization objectives</li> </ul>
<b>2</b> Roles and Responsibilities	<ul style="list-style-type: none"> <li>Standardize risk management infrastructure throughout the organization</li> <li>Clearly define roles and responsibilities</li> </ul>
<b>3</b> Risk Culture	<ul style="list-style-type: none"> <li>Prioritize risk management at the top and actively oversee implementation of risk management programs</li> <li>Monitor and report on risk management effectiveness to governing bodies</li> </ul>
<b>4</b> Communication	<ul style="list-style-type: none"> <li>Define escalation protocols and reporting lines</li> <li>Seek internal and independent assessment of risk assessment management</li> </ul>



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## ...and Key Governance Principles.

### Governance Principles

### How Can This Be Achieved?

1

**Roles and Responsibilities**

- **Clearly define roles and responsibilities**
- **Determine and assess appropriate performance categories and indicators**

2

**Goals**

- **Define clearly the mission and strategy of the organization**

3

**Oversight**

- **Include an appropriate mix of skill, knowledge and experience on the board**
- **Enhance board effectiveness through forward planning of board-related activities and regular assessments of board performance**

4

**"Tone-from-the-Top"**

- **Maintain transparency and accountability to external stakeholders**
- **Set a strong tone for ethical and responsible decision-making throughout the organization**



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The Holy Father saw this, that the mundane world of regulatory compliance and achieving international practices, from a transparency point of view and financial accounting methods, would mean that you would be able to operate, and that it was a strategic moment to put these things in place.

I want to remind you that it's almost a mathematical equation. Enhancing credibility and achieving long-term success are the new normal, and it means putting these building blocks together—transparency, governance, regulatory compliance, and quality. It equals credibility at the end of the day, and as boring as those things may be, when put against some of the gospels, they allow the gospels to be fulfilled and for all of us to do the

work that the gospels ask us to do. And, in the end, the challenge for all of us is to take that credibility that's now being achieved and add to it sustainability, and that's what's so amazing about hearing Danny speak today. You can see that there are ongoing efforts in the Vatican and that these will equal the long-term success, which means the Vatican will have the confidence it needs to spread the good word.

**GEOFFREY BOISI:** Thank you so much. Our watch words here are service, excellence, and Church management, and I think we saw the personification of those three things in these two people.

# Participant Comments

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**BISHOP THOMAS DOWD:** As a bishop who has some responsibility for temporal administration in the Church and who has to try and, frankly, convince some of the priests to be more involved in the temporal administration in a competent way, there are two messages that we get that sometimes seem contradictory. One message is, like what Cardinal Pell had said, that you quoted, that we have to know something about the money, despite the fact that we get really no training in it whatsoever. And the other message is, since you have no training in it, you should make sure there's lots of room for the laity who have lots of expertise so that they can come in and add their contribution, which I agree with 100 percent.

A bit of personal background: I have a degree in international business and finance so the money doesn't frighten me one bit. I see the importance. But in order to get these kinds of positive changes through, and in order to make it happen, what is the proper role of clerical leadership in partnership with the laity? Could these reforms have happened at the Vatican without a cardinal pushing them through? With all of the experts in the world—forget about the individual, Cardinal Pell—could it have happened without that kind of senior clerical leadership? Where is the place of that clerical leadership in trying to bring these kinds of things forward?

**DANNY CASEY:** Your Excellency, thank you. It's a very good question, and

I suppose I come from the school that says it's very important that the Church is clergy lead and that good leaders attract others around them and build a team and skills to address their own strengths and their own weaknesses. But I think there's got to be leadership and ownership of the obligations that come with the stewardship entrusted to the clergy. To be a parish priest, there's got to be an engagement of lay advisors and lay staff that respect that leadership but also, then, deliver and interact and engage to support good administration.

I had very similar issues. Having been the first layperson in Sydney in the role, I was initially suspected by many of the clergy. One in particular brought to me a proposal for an act of extraordinary administration, when I'd only been there a few days, and the method and the approach was that it had to come through me to get to the cardinal for approval and he wanted my view on what it was. This was a long-term lease that the priest wanted to have renewed. In fact, it was a 10-year lease. They were 3 years into the lease and the tenant had wanted to hand the lease back in, in return for a 10-plus-10. And he kindly offered, the parish priest told me, a 10 percent increase in rental. Now, that all sounded fantastic to the priest, and this guy was a good parishioner and he's running a business on parish property, et cetera, and he wanted to increase his rent from \$45,000 a year to \$49,500, and the priest was beside himself. He wanted to get this signed up and get the extra money as quickly as possible.

It didn't smell right to me. Handing back a 10-year lease 3 years in and offering, kindly, to give an extra 10 percent—it smelled to me like this was a below-market transaction. I had nothing to go on

other than instinct and the fact that where I'd come from it just didn't sound or smell right. Now, the priest went absolutely ballistic when I said I wasn't prepared to recommend it without thinking about and exploring the market values.

Anyway, 6 weeks later we settled a new lease, a 10-plus-10, and the starting rent was \$137,500, not the \$49,500 that was offered, but \$137,500 per year, with annual increments and market reviews every 5 years. So the good parishioner got his 10-plus-10 but he had to pay something that more reflected the market values of the transaction. Now I suspected that what he was doing was negotiating with who he was negotiating with. I've got no issues with him trying to do what he did. And the parish priest reluctantly accepted that I might have added some value in that transaction. So he conceded through gritted teeth that perhaps he overreacted, and I said the really sad thing with this is that \$270,000 is in your parishioner's pocket and not doing good work in the parish, because this should have been done on day one. It should never have happened this way.

He's the parish priest. He's never been counseled on this. He'd never been advised on this type of transaction. He'd never been coached in this. To help, I did

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encourage a framework around priests that would actually support them. We set some guidelines for finance committees. If the finance committees didn't have the skills, then I or my staff went out to help the parishes, to help grow those skills, to try and locate the people to guide the priests, respecting the clergy leadership but also bringing their expertise and working in partnership.

That's one example of what we did. It's not an easy ride. I come at this from the point of view of the Church being clergy-led. To answer your very specific question, could the reforms have happened here without the leadership of the Cardinal? I think absolutely not. They needed the leadership of a cardinal. But I also think they wouldn't have happened without the leadership of Cardinal Pell, in particular. He is someone very, very special. I've met and dealt with many cardinals and archbishops around the world, and I've also met with some enormously talented CEOs, but I haven't met too many that held a candle to Cardinal Pell, particularly in this field. It was an inspired choice by the Holy Father.

**BETTY ANNE DONNELLY:** We are so grateful for everything that you have done in the last few years. It's just extraordinary. I've had the privilege to get this kind of report as a member of FADICA. But I'm thinking about especially U.S. Catholics in the pews, and once a year they're asked to contribute to Peter's Pence. I'm wondering, are you

working with the new communications apostolate to distill this good news in a clear fashion for people in the pews? Where does their money go, when they give to Peter's Pence? To increase the sense of transparency, someone could go to the Vatican website to see the amazing reforms that have been implemented, to help you know that when you give to Peter's Pence this is where the money is going, and the transparency of showing the budget to people in the pews in the United States and other countries.

**DANNY CASEY:** Thank you for that question. The hardest thing about learning the rules of a new game is forgetting the rules of the old. We actually requested and received the first-ever Peter's Pence report internally for 2014, and, in fact, what we received was a statement of income, not a statement of expenditure. But that was the first time we'd actually been given a statement at all, so that was a good start.

If we are soliciting donations for a particular purpose, we owe it to the people who generously give that money to explain what happened to that money, and to point to precisely where it went. Now, those views have been strongly and firmly

put in various forums, and I anticipate that, in time, these things will occur. We cannot raise funds for one purpose and use them for something else, whatever might be in the fine print. The views being expressed by Cardinal Pell and I and others in the Secretariat and the Council are very clear that we need to progress with transparency, around Peter's Pence and around all the collections that occur. There needs to be the rigor. If you actually do that you tend to get more. If you demonstrate a connection between the giver's motivation and the causes that are served, it tends to work better all around. That's where we are, but it's an unfinished piece of work.

**GEOFFREY BOISI:** Do you feel, and do you feel the cardinal feels, and do you feel the Pope feels, that it's part of the mission of the new Secretariat of the Economy to disseminate these best practices throughout the Church and around the world? I'd also ask you to comment on whether or not you are seeing similar organizations to ours trying to affect the quality and best practices of temporal affairs in other parts of the world, because following up on the bishop's comment, you found how hard it was initially, being a leader in Australia.



Betty Anne Donnelly

You've seen how hard it is at the Vatican. We've seen how hard it is in the United States. We're starting it here. Other countries have started to be interested in it. But if we had the bully pulpit or the prophetic pulpit, however you want to call it, of the Vatican, of Cardinal Pell to call lay leaders from around the world to provide the service and the professionalism and the capability that you have, we may be able to move the ship a lot faster. Maybe both you and Elizabeth could comment on what you're seeing, hearing, and what you think is needed. We have some ideas on how you could help us, but do you sense that there's a vision there to have organizations like us do what you're doing?

**DANNY CASEY:** We're very focused on our competence and authority and role within the Vatican, but we're also very focused on the fact that we have a moral leadership position. As I have described to many a monsignor inside the Vatican, you might think we're some isolated community of 4,000-5,000 staff but there 1.2 billion Catholics out there who are relying and hoping and trusting and praying for the fact that we will do the right thing, we will do the very, very best that can be done.

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*If the Church is strong, if we do this well, the world will be a better place to be.*

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But on top of that, if the Church is strong, if we do this well, the world will be a better place to be. So, in fact, there's a lot riding on this, and when my wife and I were praying and contemplating whether to make the move to Rome, one of my

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close friends said, “You've got a shot at helping strengthen the Church, and if you strengthen the Church you'll strengthen the world. You've got to go for it.” And I remember that as being one of the most persuasive inspirations that was given in a deep and dark moment when I really wasn't sure whether to do it or not.

We're also very conscious that our house is not yet fully clean and in order. Not yet. We've made enormous progress but we've got a long way to go. So when we produced our financial management policies, all distilled, based on IPSAS, it looked beautiful and we were very, very proud of it. But it was produced as a document to help deploy and help deliver change management at a local level.

Immediately a number of cardinals and bishops said, “Can I take it home? Can I use it at home?” Of course you can. But at this stage until we've really started to get a few more runs on the board, we don't feel that we are competent to be able to be preaching to people on the other side of the world about what they should be doing.

**ELIZABETH MCCAUL:** There's a very strong sense in Rome that what is being done is being done not for Rome, not for Vatican City, but for 1.2 billion Catholics around the world. I was asked that question, “Are you ready to do this work on behalf of 1.2 billion Catholics around the world?” This work is so, so important.

I would suggest that Cardinal Pell, and Danny as well, are almost too humble, because I don't think you need a perfect house to be able to go out, for those 1.2 billion Catholics, and explain the great work that you've been doing, the very particular, detailed processes that are being put in place, the way to negotiate a real estate lease so that it's done very well and the highest amount of market value is being brought to all of the coffers of the Church for the poor.

I don't think it needs to be a finished project to go out there, if there's time, and I recognize that because you're still in the building mode, that time is very scarce. But to me it would be so important to have Rome really advocate that an organization such as Leadership Roundtable could be replicated and could work with you to help deliver the messages to the dioceses and religious organizations and parishes about how to do this, and also that it's being done, because that will make it also sustainable. It won't be something that could disappear, and there's so much good that's being done. I would so strongly encourage to build a way to get those messages out because they're good.

**MARCOS RAMIREZ:** I represent the CSJ Educational Network, which is a network of elementary Catholic schools with the Sisters of St. Joseph of Orange. I appreciate the contrast between the



Elizabeth McCaul and Geoffrey Boisi

financial lens and the pastoral lens and how they balance and blend. It's really what's going to help us create a journey of transparency, accountability, and participation. Just a quick example, when we talk about sustainability and success and we apply that within the sustainability of elementary Catholic schools in California, for example, the interpretation of sustainability and success from a financial perspective may lead a diocese to consider merging and eliminating a number of the poorest urban schools that are not financially sustainable in the long term. However, the pastoral perspective says we must sustain those schools, even if we have to subsidize them, because it is the morally right thing to do from a pastoral perspective.

So, balancing both a pastoral and a financial lens to make good decisions for the good of all, how would that play out as we assume some of the practices based and guided by the standards?

**ELIZABETH MCCAUL:** I don't think that there is a prescription about strong financial practices that would in any way, shape, or form command the closing of schools that serve poor, needy children.

The two are not, by any stretch of the imagination, exclusive. It's, rather, the other level that I'd like to just ask you to think about: are you doing the best with the dollars that you have in order to be able to ensure that they can reach as far as they can? Strong practices that attract more donations because there's trust and confidence in them will allow you to serve more underserved children. It doesn't mean you have to make a for-profit decision with every investment that you make. It means that you have to do the very best with the dollars that you have and not squander them; put the processes in place.

**DANNY CASEY:** I absolutely agree. I spoke about the need to make a clear distinction between the pastoral mission-related work and activities that are commercial. Running a school particularly for the poor, but any sort of school—we do that for pastoral work. We do that to save souls. I would not be putting financial benchmarks around that. But I would be requiring high level of sound management and administration to make sure that the monies that are gifted and in the program are being well spent, well managed, and there are tight controls.

But my great delight at what we've done here and certainly what we did in Sydney was the opportunity to enter into business discussions and to actually squeeze money out that could then be put towards more schools. Not long before Cardinal Pell and I left, we helped establish a school for street-based aboriginals, indigenous people. We are a fortunate community in Australia, but we've got certainly some disadvantaged in certain indigenous communities. And one of the things about this is that just attracting a special school model that would encourage people who are living on the street to actually start entering into education. Education would be the pathway out of poverty for them, and in fact, the school is full. It's only small numbers, but it's full. The ambition, the targets that were set are full, and yet we could not have put our financial resources into a wonderful measure like that if we had not had some very tough conversations with some business people on long-term leases and other things that had nothing to do with the mission work. That distinction, exactly how Elizabeth put it, is so fundamental, but I wouldn't blend the two.

**GEOFFREY BOISI:** Danny are there any practical pieces of advice that you could give the group in terms of the working relationship that you developed with Cardinal Pell, whether in Sydney or more recently, in your evolution of your working relationship that you think were absolutely critical to the successes that you've had and how he educated you or you educated him, or what were some of the more practical, tougher kinds of things that you had to iron out?

**DANNY CASEY:** I did ask Cardinal Pell why he wouldn't take a priest for the role

and then have someone more junior with him, and he said, "If I had a priest with a CV exactly the same as yours, I'd take the priest, but I couldn't see how a priest could have your CV and be a faithful priest so it's the CV I'm after."

He then said to me, "Look, I suppose there's a number of things we need to get right if we're going to work well together, and one is that I'm actually Archbishop, and I have the final say. But what I will do is I will not be straying into your area of competence, certainly, without having a dialogue and discussion, and I want your commitment to make sure that you will always tell me what you think. Even if you know it will upset me, I need you to tell me what you think." Now, I would think probably 99 times out of 100 when I said what I thought, the Cardinal consented, agreed, conceded, didn't proceed. Maybe 1 in 100, he said, "Well, I hear you, and thank you for saying that. But I'm still going to do something else." That happens. He's the boss. That's the way it works.

I would think the advice within that is to make sure that we're very clear. I never wanted to be the Archbishop of Sydney. I don't want to be Prefect of the Secretariat for the Economy, but it's my great privilege to have served the man who is so devoted in his roles, as the director of his office here, giving advice, implementing things. I mean, he does not challenge or question the way in which I am analyzing the cash flows or the policies we're writing to make sure they're consistent with IPSAS. He's relying on me to do that.

But, in fact, I respect and want and believe in clergy leadership, but I also think the leadership, good leadership requires that people around address your own lack of

competence or experience, and good leadership encourages a dialogue where your staff can tell you what they think. So if there's one thing that matters, it's actually that if you can see something that you think your boss can't see, then as respectful as you can, you tell them that's what it is, but you also respect their right to make the decision. The arrangements that we had with the Cardinal were very clear. It was his decision. I had to leave him to make it. I give advice. If it was mine, in my area, he's very happy for me to make it, and so that was the way in which we worked and worked well for all those years.

**MICHAEL MONTELONGO:** I'm a new Board member with Leadership Roundtable, and I add my thanks along with others to both of you and your peers for the great work that you've done. I want to go back to a discussion thread that I think, Geoff, you had begun and want to be very clear about the challenge that I think is before us now that you've completed much of this work and you've had this success. And that is the cascading challenge of essentially spreading this on a wider basis and having very explicit knowledge transfer and knowledge management strategies so that we can leverage the great work that you've done, and so that others don't have to reinvent wheels that you've already invented.

**DANNY CASEY:** That's absolutely true. We've got to cascade. This forum and the fact that we're able to engage like this is part of that process. Some practical things at this end, you would have heard that Cardinal Pell has suggested a change in the curriculum in what is known as "baby bishops school" to actually introduce some of these concepts and

materials. I think another area that's being explored is the idea that, upon retirement of one bishop to another, there needs to be an independent audit and review of the books, a bit like the change of government. All these things are potential ways of keeping the momentum going on some of the learnings.

Certainly, everything here is available if people wish, and yet while we have been busy doing other things, it's a great delight to have a chance to share and exchange some of that. And if any of that is useful, we're very happy to do it. Your organization and your attendance here has enormous implications because now we're together. We actually can share, and all that material that we've got is available for you.



Michael Montelongo

**ELIZABETH MCCAUL:** I agree with the point being made that there should be something very explicit about how to cascade the learnings, and I am reminded that, about a year ago, I gave a talk to an international conference of diocesan finance managers, business managers, and amazingly, at the end of that talk, a U.S. finance manager from a diocese came up to me and said, "So do you have to give the financials

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*The number one pillar that we're talking about is transparency, to create the credibility and confidence in the Church. It should be shared.*

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to the parishes? Do you have to give them to the parishioners?” And I said, “Absolutely yes. The number one pillar that we're talking about is transparency, to create the credibility and confidence in the Church. It should be shared.” And he said that his archbishop was completely opposed to doing that. So that was just real evidence that there is a need out there still, I think, to give direction and maybe some basic processes or principles that cascade out would be so useful, I think.

**GEOFFREY BOISI:** On a practical note, do you think it would be helpful if Leadership Roundtable here and some of the budding Leadership Roundtables of other countries and other bishops' conferences, if we communicated together and maybe either made a visit to you all or made a visit to one of the groups that you had mentioned that are governing bodies to let them know what we're doing, but also the desire to build on what you have built there? Is that a helpful thing, a worthwhile thing to do?

**DANNY CASEY:** Absolutely. I think that would be outstanding. I think that would be very, very good. It would be useful to connect.

One of the other things I didn't mention in this dialogue here—and this is another

reason for doing exactly what you're suggesting, Geoff—we've started a small internship program with the Catholic University of America and the Australian Catholic University. Cardinal Pell said his idea is to evolve it to the equivalent of the White House internships, with a stream of opportunities of people coming from around the world to serve inside the Vatican and providing people inside the Vatican the opportunity to go elsewhere to learn. Now, how do you turn something so small as an initial internship program into the White House internship program? We do it through engaging with people like yourself and others from around the world, and we start to work together. How can we do that? Are there people in your world, in your space, who would put their hand up to come here for 3 months, 6 months, 12 months to do some work, and would you be open through receiving people from here who might want to have some actual experience? We've got to do something about internationalizing the operation because we don't just live inside those Vatican walls. We're an international show, and we're the only operation guaranteed to be here to the end of time. We have to manage ourselves well.

**KERRY ROBINSON:** Thank you. What a great session that was. Elizabeth, Danny, Geoff, thank you. If ever there was three examples of how blessed the Church is by lay expertise and dedication, it is the three of you. Thank you for exercising baptismal responsibility to benefit the Church.



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# Table Discussion

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## Themes from Table Discussion Question #1

### **What lessons can the Church in America learn from the Vatican about financial reform and accountability?**

Evidence of how change needs to be deeply cultural, not just organizational and structural  
This is trans-generational work for the Church; not only at Vatican level but at US and diocesan level too  
It takes highly ethical and professional people to bring the Church forward in this regard  
Transparency to all constituents (clergy and laity) is crucial

## Themes from Table Discussion Question #2

### **What best practices for financial transparency and accountability can the Church in America share with the Catholic Church in other countries?**

Annual financial reports  
Transparency throughout decision-making process

## Themes from Table Discussion Question #3

### **What best practices does the Catholic Church still need to implement, at the parish, diocesan, national and Vatican levels?**

An understanding that the Church is NOT a business, but rather business-like.  
Mission always comes first.



2016 ANNUAL MEETING

*The Francis Effect and Changing Church Culture:  
Advancing Best Managerial and Leadership Practices*

June 29–30, 2016

Inn at Penn,  
Philadelphia, PA

[leadershiproundtable.org](http://leadershiproundtable.org)

## Lessons Learned from Changing Managerial Practices and Church Culture in the Archdiocese Of Montreal

**Geno Fernandez**, *Head of Strategic Execution, Zurich North America*

**Most Rev. Thomas Dowd**, *Auxiliary Bishop, Archdiocese of Montréal*

**KERRY ROBINSON:** We are exceptionally fortunate to have Geno Fernandez and Bishop Thomas Dowd with us today. Geno is Chief Underwriting Officer for Zurich, which is a 16 billion dollar insurance company. He's also a member of the Board of Trustees of Leadership Roundtable and a great advocate and an example of someone who understands both the secular world of management and finance and has a deep dedication and knowledge of the Church.

Bishop Thomas Dowd is Auxiliary Bishop of the Archdiocese of Montreal, and among his many striking attributes and accomplishments is his degree in international business and finance.

I want to especially thank our colleagues and partners at Faith Direct and in particular Brian Walsh, who is here with us today, a longtime friend and member of Leadership Roundtable, for your sponsorship of this lunch and your

support over many years of our service to the Church.

**GENO FERNANDEZ:** One of the great things about Leadership Roundtable is we try at these annual meetings always to give you practical looks into how the Church is being managed and how best practices are being executed at different levels, and what a great, tremendous

presentation we just had about how it's being done at the Vatican.

One of my favorite hymns is "From the holiest in the heights to the depths be praise," and now we're going down to the world that most of us are more familiar with than the Holy See, and that is a world of dioceses.



Geno Fernandez and Bishop Thomas Dowd



Bishop Dowd, you were ordained a priest in 2001 and were ordained bishop in 2011 and then made the auxiliary of Montreal. How did you get to know your diocese?

**BISHOP THOMAS DOWD:** Let me address the question of my age. To be made a bishop after 9 1/2 years of priesthood is pretty quick, and people sometimes ask me how that happened. My answer is: desperate times call for desperate measures!

I was assigned to the care of the English-speaking Catholics of Montreal. Montreal is a French-speaking diocese but with a significant Anglophone minority, and so for many decades, there has been an auxiliary who acts like the ordinary for the English-speaking population. So, although I'm an auxiliary, I have a lot of the same dynamics as a diocesan bishop within that context that you mentioned getting to know.

Our conference here is about transforming culture, and it's one thing to have procedures and policies in place, it's one thing to have policies in place, but for it to be a culture, there has to be a level of engagement and dialogue among multiple parties all across the board. For myself, I

began a process of parish visitation. Now, a bishop visiting a parish, in theory, is something you're supposed to be doing, but what I discovered upon being made a bishop is that there is actually no manual on how to do that. There is no textbook. It is mentioned in the Code of Canon Law that the bishops visit the parishes and other institutions, so I went looking for the instruction manual on how to do it. It does not exist. I read a doctoral thesis on the subject. It helped me get to sleep at night, but it did not teach me that much on how to do it.

The methodology that we put in place was the following. I would show up at the parish for the first weekend, and preside all the Masses. Then I would actually move into the rectory and live there for the week. I would transfer my flag, you might say, to that parish. Thanks to laptops and Internet, you can actually get a lot done at a distance. During that week, I would encounter all the parish leaders, certainly the staff, but committees, different groups, members of the community, key stakeholders in the neighborhood, walk around the streets just to get a feel for it, and then close off the visit with another full set of Masses the second weekend, and then return several weeks later with

a PowerPoint presentation to show to the staff, but also the parishioners, what I had seen and observed. The goal was always not to give a report card so much as to help people see what I was seeing so that we could be on the same wavelength. I remember telling people, "I have to make decisions that affect the life of this community. I want to make sure my decisions are well informed. Your job is to help me make sure my decisions are well informed."

Of course, what happened as a part of that process is that a lot of people discovered their own parish, things they had not noticed about their own community, and in addition, the presentations would always include an element of education. The same part for every presentation was on "what is a parish," "what is the mission of a parish." Very often, we think we know until we try to define it, and then, all of a sudden, different models and ideas bubble up. So we try to come to a consistent vision so that people are able to almost measure themselves for what was going to be happening next. This gave me a chance to get to know the parishes not just through sort of the lightning visit of for Confirmations or through reading lots of reports. It was one-on-one human contact.

The very first parish I ever visited was a small parish where the fear among the parishioners was, "The diocese wants to close us," and when I showed up, my presence was assumed to be a confirmation of that fear, that I was just prepping the way for a closure. In doing the visit, I discovered the parish, indeed, had issues, but it was a parish that we couldn't do without for pastoral reasons. So I put it to the people. I said, "It may happen that you close. I don't want to do it. I'll support you, but I've got to see



*I have to make decisions that affect the life of this community. I want to make sure my decisions are well informed. Your job is to help me make sure my decisions are well informed.*



you meet me halfway.” As soon as that message was communicated, I discovered that a lot of the people were holding back from being involved in their parish because they were wondering, “what’s the point if we’re going to close anyway.” Once they were empowered in that way—without any official delegation or anything, it was just an empowerment by letting them know what their future could be—they rose to the challenge. Suddenly, fund-raising was happening. Suddenly, activities were happening. But I couldn’t just show up and say, “We’re not going to close you.” The fact of doing the visit meant they were able to take that and run with it—it’s almost like I had to prove that I really didn’t mean to close them; I had to prove that they were going to stay open.

The next visit I did was to a large parish, one of our biggest that was very successful. It was twinned with the smaller one, so I kind of had to do one with the other. Some people wondered, “What are you doing here? We’re not about to close.” I said, “Well, I’m just here to do a visit,” and I got to know lots of people. It was a wonderful encounter. They didn’t really have any financial problems. They had lots of people involved. Everything was going great, right up until when the permanent deacon was arrested for possession of child pornography, and all of a sudden, the fact that I knew all those parish leaders by name made a huge difference because I wasn’t just the guy from downtown again in a crisis. I was a

friend with my friends, and we were going to get through this together.

Investing in human relationships by getting to know the parishes, more than just as an abstraction of statistics or reports or what have you—talk about transforming culture! Culture is composed of people, and that contact in that way was and continues to be extremely valuable. I gave myself a 5-year schedule to visit all the parishes. The 5 years are up this year, and now everybody wants to know what’s the big picture. So we’ll be doing a major presentation on that.

**GENO FERNANDEZ:** Which is a good transition. I heard you say that your engagement began with listening. You weren’t afraid to actually create a rule book when the rule book didn’t exist, and you gave feedback. You gave feedback in a way that was very tangible to the people you got to know. All of these practices are known in the business community. They might not be executed in the same way everywhere, but I think that’s a great example of how you brought some of those skills into your leadership in Montreal.

Now, a lot of us are diocesan or parish administrators here or members of finance councils or school boards. I’m a member of a finance council of the Archdiocese of Chicago, and I always like to point to an example of a beacon on the hill, a parish that’s just so great and has really engaged its people. But part of the conference is “How do we transform a culture?” And a

lot of what we have heard today is about how difficult it is to scale the change. How do you think about effectively sustaining change where there’s actually a very great diversity of talent or a great diversity of performance?

**BISHOP THOMAS DOWD:**

Sometimes diversity can be attributed to different skill sets, to different circumstances. Sometimes that diversity is just inherent in the environment, that’s one thing I’ve learned. If you have a parish where 5,000 people go to Mass on a weekend versus a parish where 100 people go on a weekend—and we do have those kinds of distinctions in the Archdiocese—you can’t expect the same thing from everybody.

First of all, creating a common vision of reality, what is actually going on with our own communities and parishes or nonprofits and to be able to take an honest look at ourselves is important. You can’t go to Confession until you’ve done your examination of conscience, right? You want to receive the grace, but you’ve got to have an honest look at yourself. I think in order to have transformation, you’ve got to be able to do that, and so that’s one key element.

Another key element, apart from this common vision of reality, is that there are certain functions that are common to every institution. There are differences, but there are common features that have to be lifted up as well.

During Elizabeth McCaul’s presentation earlier, at one point, I noticed she apologized for talking about what may seem like boring functions. I know a lot of people might look at the accounting functions and apply the label “boring.” But I believe it was GM that recently recalled a whole bunch of cars because there was



*You build the Kingdom of God by preaching the word, by offering the sacraments, by accompanying the faithful, journeying with the flock. That’s how you build the Kingdom of God. But if you have bad administration, it will seriously hamper all those other efforts to build a Kingdom of God.*



a pin in the ignition that was designed a couple of millimeters too short, and so the key used to fall out while the car was operating. Now, when you talk about performance, people want to work on the motor. They want to work on the thing that makes it the muscle car, but all cars, they’ve got the same kind of need for a safe ignition switch. So you think it’s the boring thing to design a pin and a switch, but it actually was a matter of life and death. And I think in our parishes, we sometimes have these tiny pin issues that we think we can ignore, but we can’t because when we ignore them, the key falls out, and the engine dies. And so a lot of the administration issues, which we can sometimes spontaneously label as boring actually are mission-critical and I think that’s an insight we need to communicate across the Church.

Now, it is true—I’ve said it before; I’ll say it again—you don’t build the Kingdom of God through good administration. You build the Kingdom of God by preaching the word, by offering the sacraments, by accompanying the faithful, journeying with the flock.

That’s how you build the Kingdom of God. But if you have bad administration, it will seriously hamper all those other efforts to build a Kingdom of God.

Sustainability requires a baseline. You create a baseline that the vast majority will agree to, and those that don’t agree, you try and create a baseline such that

your vast majority will agree to it, and then the few holdouts you have to deal with, but at least you’ve got a consensus. And then you gradually raise that bar. The image I like to use is, in many cases, our parishes or some of our institutions are like ships caught on a sandbar. You can try and push them off the sandbar one at a time but that’s a lot of effort. But if, on the other hand, you could have the tide raise, then they will just float off. Now, that happens naturally. In the Church, it’s not going to happen naturally. It’s going to happen through effort, but it’s a different perspective on how we’re getting our different institutions to float. The secret is we’ve got to establish that initial baseline, which is where things like standards are extremely important—standards, procedures, policies, and so on.

**GENO FERNANDEZ:** That’s very interesting. So, again, your speaking words that, at least for me, resonate very strongly in business as well. You need to have a good fact-based assessment of where you are, with good administration as an enabler, but ultimately is underneath the mission. When you talked about the mission, what I heard you say, is the mission is truly to evangelize. The mission is to preach the word and celebrate the sacraments. And it reminds me—I’ve had the pleasure of knowing Bishop Dowd for several years now since we met in Chicago. One of the things you said to me a while ago that has stuck with me is that liturgy is a primary vehicle of Christian formation.

Can you talk a little bit about liturgy in the Archdiocese of Montreal or how you have taken that statement and made some practical ways to gather people around you to be collaborators?

**BISHOP THOMAS DOWD:** With regards to the liturgy let’s face it: Sunday Mass, for many people, that’s our main product. That’s where they engage with the Church if they are wanting to live as disciples rather than just as religious consumers. In some case, they are living it as religious consumers, but given the social pressures and the fact that if you say you go to church on Sunday, people will look at you funny, there’s an increasing element of sacrifice to go to church that we’re seeing. So that is the school of discipleship for the vast majority of our people, where, for example, the Sunday homily or all the elements of the liturgy, even their own personal involvement, becomes the baby steps for all of those things.

For example, we would love if it everybody came to the Bible study we organize on Wednesday night, but no matter what, we are always going to be recruiting a minority, a minority who perhaps become higher level leaders within the community. But the basic area of formation is going to be Sunday liturgy, and it’s going to be gathering people for that.



*Our parishes are like ships caught on a sandbar. You can try and push them off the sandbar one at a time but that’s a lot of effort. But if, on the other hand, you could have the tide raise, then they will just float off.*



So the question is, how do we leverage that? If that is the area where we are gathering the vast majority of our sort of regular disciples, how do we leverage that for the sake of leadership?

Now, because of the geography of the Archdiocese of Montreal, it's not one of those dioceses where you've got to drive 3 hours to get to the next church. If it was the Northern dioceses in Canada, you've got to fly 3 hours to get to the next church. We're not in that situation. So I picked the church that's at the geographic and transportation heart of the diocese, and I do Mass there every Sunday at 8 p.m. This gives me my Saturday night and my Sunday morning to visit other churches, but everybody knows the Bishop is there Sunday nights. And it cuts through a lot of the hierarchy and communication layers. If people want to see the Bishop, he's there. They know they can go straight to me. That has its advantages and challenges, but I don't regret it one bit.

I discovered doing this that the people who go to that Mass, if they are going to a Sunday 8 p.m. Mass, it's because they want to go to Mass. This is not the Mass of getting it out of the way for the weekend. They've already missed it in their regular parish. They're going there because they want to be there, which means they are disciples. They are those people who have a level of commitment, and very often it gathers the leadership types within the different parishes. So, by doing that one simple Mass led by me, it's become a way of identifying the people who are best able to act as leaven in the dough.

From that have come other activities—the recruitment for different boards or committees or projects built around that Mass, some of which are sacramental. We have Confessions being heard not

just 15 minutes before the Mass but throughout, and the confessional is full throughout the whole thing. There is a little book table, so people can learn more about their faith and go home with something. The idea is to use it as the school of formation, a school of formation in discipleship and particular to that group which self-identifies as being interested in going further. It has been an interesting way of discovering the leaven in our community.

**GENO FERNANDEZ:** It's great. It reminds me that the Second Vatican Council taught that liturgy and Mass in particular is the source and summit of our life in the Church.

**BISHOP THOMAS DOWD:** That's exactly it.

**GENO FERNANDEZ:** You've managed to take the source and summit of our life in the Church and identify the leavens, the collaborators, the people, the lay leaders who you need to effectively do your ministry.

I think for many of us, the challenge is not one of do I want to do it. It's how do I do it. That is a remarkable story of how you actually identify talent and funnel them into the organization and made them greater disciples of Christ.

**BISHOP THOMAS DOWD:** And build a coalition of the willing.

**GENO FERNANDEZ:** Exactly. Last night you were talking to some folks and you were describing to them how you have built a strategic plan or are building a strategic plan. You said it was very important that we define our terms up front, and the three terms that I think I heard you say it's very important

to differentiate between: the work of evangelization, the work of catechesis, and the work of the apostle. Could you say a little bit more about what that is in this world of the New Evangelization, how you thought of those seminal concepts to put in the strategic plan?

**BISHOP THOMAS DOWD:** The expression "New Evangelization," of course, is hot right now. There are some people who are right on the bandwagon and others who are sort of waiting for the fad to fade.

One of the ambiguities around the new evangelization is how to do it. My father, who just, sadly, recently passed away, in his 93rd year, he once attended a conference on how to undertake the New Evangelization. God bless him, you know? He was keen, but his big protest was, "Will somebody please tell us how to do it rather than just talk about it?" I have come to see that terminology is important. Ambiguity in terminology can confuse people, and when you look at the use of the word "evangelization," it's actually used in three different ways in our tradition. And we've got to know which way it's being used, depending on what book or document we're reading.

There is primary evangelization, which is really going out and announcing the Kingdom, what we call the "first proclamation," somebody who has really never heard it before and it's fresh and new—or they think they heard it before, which is worse, actually, because then you've got to dismantle a misunderstanding. But at least you're getting it out there for what is really the first time. So that's evangelization in its proper sense.

The RCIA manual, the actual liturgy book, says first evangelization and



Bishop Thomas Dowd and Geno Fernandez

then catechesis. When you read the Vatican Directory on Catechesis, it says, “Catechesis is part of evangelization.” So you’ve got two documents coming from the Holy See that use the word quite differently in what is seemingly a contradictory way.

When you go to blessed Pope Paul VI’s encyclical on evangelization from 1975, he also describes evangelization as “gospelization” of the whole world and all of its social structures and the way we live. So which is it? Is it primary proclamation? Is it catechesis, building up of disciples? Is it apostolate, changing the world? Well, it’s all of them. You just have to know which one you’re talking about in any given context.

In the strategic plan you mentioned, that’s effectively what we’ve done. We’ve tried to put it all under evangelization but distinguish each of those meanings. We found we have to go back to figure out what’s our primary business. How many times have we heard stories of companies that were floundering? And one of the big issues in their turnaround was they had to redefine for themselves what their business was. What are we producing? We are meant to be a factory of saints.

It’s people that we’re producing. That’s what we’re trying to bring into the world. We’ve been given the tools to do that. We’re custodians of the sacraments and of the grace of God. That’s what we’re trying to bring to the world—to develop a business model that’s built around building up the human person in the grace of God through evangelization as the first step to knowing Christ. Your catechesis and discipleship is going from those who say “Lord, Lord” to those who actually do the will of the Father in Heaven. And where Jesus distinguished between believers and disciples in his own teaching, he also called Apostles. Jesus took his disciples and called 12 to be those who were sent forth. How do we help build people up in that growth cycle?

I remember getting to a parish, and I told the people, “I can’t make you holy. Only God can make you holy. But if I can’t make you holy, I can at least make you smart. I can at least give you the tools, and God will give you the grace.” I found that helping build people up allows them to be the built-up—those who are built up to go into the world.

**GENO FERNANDEZ:** Again, what strikes me are the parallels in what the

best management and practices are in running an organization and how you’ve applied that to creating a strategic plan that starts with first principles that define the mission, the production of saints, that actually says that the mission is accomplished through various phases, and then being so deliberate about how you attack each of those phases.

Now, I can’t leave it off without actually going to another part of cultural transformation, which is communication. I think it was George Bernard Shaw who said that the single biggest problem in communication is the illusion that it has taken place. I find that to be the case quite a bit in my company. I’m sure that you found that to be the case as you have been meeting in Montreal. What things have you done to actually open the door to communication as a way to scale the mission you just described for us?

**BISHOP THOMAS DOWD:** That’s still a work in progress, to be perfectly honest. I found one of the key barriers to communication is the attitude of some that we’ve heard it all before, even if they haven’t heard it all before. But it’s just they’ve “heard it before,” and nothing seemed to ever come of it, so they’re wondering why they should take the risk of paying attention again.

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*Will somebody please tell us how to do it rather than just talk about it?*  
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One of the key factors of communication is the question of how we engage people in a community of communication, hence the use of the strategic plan. We’re up to Version 10 of that plan.

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*As you correct small errors, you make revisions to structure, and sometimes you've got to revise the whole approach. That's the major update. But the idea is there is never one fixed final version. There's always going to be the next update.*

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People are surprised. Version 10. How can you have Version 10 of the strategic plan, in 5 years? But the idea is we tried to write the strategic plan almost like the operating system of a piece of software. With the operating system, you will have Version 1 and then Version 1.1 and then Version 1.1.1. As you correct small errors, you make revisions to structure, and sometimes you've got to revise the whole approach. That's the major update. But the idea is there is never one fixed final version. There's always going to be the next update. First of all, what are the new opportunities that are presented that you want to take advantage of? What are the areas of miscommunication you've got to address? By having lots of people focusing on a common vision document that they themselves feel they can contribute to because it's never really in its fixed final state, it's kind of an open source approach to developing the vision.

In terms of the communication aspect, there is the push communication of just how do you get your message out, and that's where the basic tools come in—the Internet, for instance. One thing I did is I create an e-mail list for the priests, as simple as it sounds. I asked them to give me their private e-mail, not the one that goes through the parish secretary

or somebody else. I said, “I want to be able to send you a message that I know is going to you. If you want to get those kinds of messages from me, you have to give me that e-mail because I don't want to worry about whether somebody is going to get it and then post it on their Facebook page. I have to be able to speak frankly to you, so I want to know it's going to you.”

The priests, had to choose: Am I still going to have a barrier, or am I going to allow myself to be engaged in this way? So even an e-mail list used for broadcast became a kind of community. It's a community of communication. For me, that's critical if you're going to do communication in a way that's more than just trying to sell your widget. If you're trying to do communication in a way that's going to affect cultural transformation in the Church, you've got to build that community of communication.

**GENO FERNANDEZ:** We've heard a lot about practical techniques that you used that are management best practices from a range of recruitment, strategic planning, communications, mission orientation, cultural change, inventing a new rulebook, codifying, and being open to change. All of these things, the best consultants but also the best business people seem to do. I find it delightful that you have taken that knowledge that you had in your previous life and applied it to your current life. It's the very mission that we as a Roundtable are trying to achieve.

**BISHOP THOMAS DOWD:** Well, people ask me sometimes, “You've got a degree in international business and finance, and you work for 3 years in telecom as a manager. How does that square with being a priest?” And I'd say, “It was a better preparation for the

priesthood than you might think, actually.” There's a lot of very practical things we learn that, frankly, are very pastoral. I think when business is done well, there's a very pastoral connection to how it's done. Look after your people. Help them to excel. All the things we want for our people in our parishes.

# Participant Comments

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**GEOFFREY BOISI:** Your Excellency, how do you think about the way that you allocate capital for projects that require a little bit more expensive professional help between the diocese and your parishes? Let's use communications as an example. To put together a quality communication team that could do some of the more sophisticated things that you were just talking about. It's a little bit more expensive than any individual parish could put together. How do you think about making the decision as to what's going to be done at the diocesan level and then let the parishes share in that sort of general kind of capability? And how do they contribute to the payment for that versus how the diocese pays for it?

**BISHOP THOMAS DOWD:** Part of my challenge is I am just the auxiliary, and so there are elements of decision-making that I frankly have to go to other people for, some of it within the diocese, some of it within autonomous foundations that fund the Church.

Interestingly, there are two very different dynamics. With regards to the autonomous foundations, I found that they really want to know what's going to happen in more detail. In some ways it's easier to get the funding internally, just because we're all part of the same family. But, at the same time, if a project is presented that makes a lot of sense and you have really made your case and it's one that inspires hope, I found that to be the key factor. Nobody wants to keep funding the heating bill. They want to see something that's going to bring growth

and hope. Then it's relatively easy to present something. So a big part of it is getting our ducks lined up.

**GENO FERNANDEZ:** Then how do you affect your heating bill? You still need to heat the churches.

**BISHOP THOMAS DOWD:** Yes, you do. But the person who asked the question is not talking about heating the parishes. The people who love their parish and want to keep it going, they will contribute by offering their own good stewardship and discipleship.

With regards to how do you pay for larger expenses, I found that when there is resistance, because it is more expensive, then you start with the element you can start with so that when there's a gap, people look at it and they go, "Oh, my gosh, there is a gap. Well, we obviously have to fill that gap to keep these good things going that just got started." It becomes not just your decision you're trying to foist. It becomes a decision from within the team itself to say, "Well, this is obviously something that needs to be completed." So it's sometimes a bit-by-bit method when you're trying to push an idea through. That's been my experience. But with regards to communication specifically, I am not convinced it has to be all that expensive. I know that it can be, but having an e-mail list of the priests is, honestly, not that expensive, and yet I would say that has been a game-changing method of communication for building a team. Sometimes doing the simplest things well has a bigger impact than doing the big things that affect a larger audience, but it may not be the pin in the ignition.

**PARTICIPANT:** In my experience, there have been dioceses who do things in a centralized way, and that affords

them greater control, greater influence. There are others that push that control out in a much more decentralized way. Where in that spectrum were you and your diocese in terms of centralization and how that played a role in your ability to do the listening sessions, guide the strategic planning process, and navigate through this effectively?

**BISHOP THOMAS DOWD:** Quebec is a unique jurisdiction in North America in that under Quebec law, every parish has its own corporation with a board of directors elected by the people. So it's not a corporation sole where the Bishop can have a centralized form of control over even particular transactions. They can't do extraordinary things, like they can't sell the church without going to the Bishop. There is an automatic decentralization, and frankly, I have no choice but to deal with it.

The issue is how do you have control when you don't even have a say in who the gatekeepers are going to be. They are elected by their peers at a parish meeting. So the only way you can make it work is by setting common mission, establishing relationships of trust, and that way, the discussions around the table become, "How are we part of this family of the Church as a whole?"

The temptation is to establish centralization over the things you can control as a way of offsetting a power balance. In my experience, that tends to cause things to slow down because people are always worried, "How do we present this to the diocese to get approval? How can the diocese intervene to take care of this issue?" and it becomes governance by individual decision as opposed to governance by policy. We found we not only need to establish policy, we need to establish proper oversight.

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*Transparency is really the core issue to establish unity in governance, whether centralized or decentralized.*  
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But, again, it can't be oversight that has necessarily a risk of punishment because we can't fire the board. They're elected by their own people, right? So you've got to be constantly working at this area of transparency.

One of the reasons I give my presentation to the entire parish at the end of the parish visit is so that the whole parish sees what their own elected board is doing, which is not always the most transparent either, not necessarily because of ill will, but just because it takes effort and it's easier to work without it.

The transparency issue is really the core issue to establish unity in governance, whether centralized or decentralized, and when you don't have it, those who benefit from decentralization don't want it because they don't want head office to know what's going on, or head office doesn't want the lower levels to know what's going on. Transparency provides the unity.

**GENO FERNANDEZ:** That also goes with what Elizabeth McCaul said to us with respect to the Holy See.

**BISHOP FELIPE ESTÉVEZ:** This morning, we discussed the leadership of Pope Francis regarding transparency and so on with the finances of the universal Church. Another area that Pope Francis is passionate about is missionary discipleship. He says, "Go out! Go to the periphery. Priority for the poor." In fact, that was the first words he said when he became Pope, "A Church with the poor and for the poor." Could you comment in what way your local Church is addressing issues of poverty and issues of the mission? How can the Church grow in attracting these majorities in secular society that are indifferent to what the Church has to offer? How is the local Church of Montreal doing in relation to this leadership of Pope Francis?

**BISHOP THOMAS DOWD:** That's an excellent question. The process of

parish visitation has reflected back to the parish how they're doing, but measured it according to the standard of what is a parish and what is it meant to be in its local environment.

That very first parish—remember the one I said that they felt they were under a threat of closure? The neighborhood itself was convinced they were going to close too. I met the mayor of the municipality that that parish was located in, and the first question he asked me when I showed up was, "So are you here to sell me the church?" I said, "Mr. Mayor, why would you think that?" He said, "Because it's closed." I said, "It's not closed." He said, "Yes, it is." I said, "Mr. Mayor, I just celebrated Mass there on Sunday. I'm the Bishop. I can assure you I would know if it was closed or not, and it is not closed. Why do you think it is?" That was a very interesting discussion because it was about the parish vis-à-vis the broader community—forget even peripheries. Next-door neighbors vis-à-vis the broader community was largely invisible. They didn't show up to community events. They didn't have any outreach for the poor or anything like that.





Jim Lundholm-Eades

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*I think one of the key issues is to constantly consider how we measure success. Does success mean the parish has no debts? Does it mean the parish has enough revenues to do its basic function?*

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So I told the parish when I went to that feedback session, “The next time there is a rumor that you are about to close, I want to start getting letters from the mayor, from the local Buddhist association, from the atheist family down the street, ‘Dear Bishop, we’re not Catholic, but don’t you dare close our Catholic church because of the difference it makes in our neighborhood.’”

The sacraments are the fuel of the apostolate. Sacramentum Caritatis, Pope Benedict’s exhortation, is about the sacrament of charity. The Eucharist is like a power plant. And there is no point in having a nuclear power plant if there is no electricity coming from it for the homes around. Otherwise, it’s just a hazard. Really, why would you want to have nuclear fuel in your neighborhood if it’s not producing a benefit?

I think one of the key issues vis-à-vis our parishes in terms of transforming culture, using the cues from Pope Francis that you mentioned, is to constantly consider how we measure success. Does success mean the parish has no debts? Does it mean the parish has enough revenues to do its basic function? If it is just internal stuff, we can look at it and have the illusion of success, but we’re not actually having a transformative effect. And I’ve tried to help our parishes to look at that as a metric for how they’re doing vis-à-vis their neighborhood.

It’s tough because neighborhoods are so different, one from the other. A very well-off neighborhood versus a very poor neighborhood will have different metrics for how they are inspiring their neighborhood. We’re still developing that, but we’ve got to focus on that.

I call it the difference between outreach and in-reach. Outreach is what we’re doing to transform the world we’re in. In-reach is what we’re doing to transform those who come in. That’s already great. Most parishes do in-reach fairly well, but how to take in-reach to outreach, we have to start measuring it because what gets measured gets managed. What gets measured gets noticed. But for that feedback mechanism to happen the measure of success I am proposing has to be absorbed, so that they look at themselves that way. That’s a key cultural transformation that we’ve got to do. And we’re still doing it.

**JIM LUNDHOLM-EADES:** Bishop, as you’ve described the cultural change in development in your diocese, it’s been my experience as a staff member of Leadership Roundtable that the pastors themselves in their leadership role are moderators of culture at the parish level. Can you talk a little bit about work you’ve done with your presbyterate in terms of developing their capacity as leaders, as moderators of culture, as you’ve sought to transform part of your diocese?

**BISHOP THOMAS DOWD:** I think many of us are familiar with the model of how people adopt products or services. You have your innovators, your early adopters, your early majority, and there’s the late majority. Then there’s finally those who will adopt it after they’ve died, you know?

We have to recognize that that bell curve exists in everything. Transforming culture is going to be the same thing. There will be the pastors who are already doing it before I showed up, the innovators. They have the strength of personality, a particular life experience that they bring to the equation. Then how do you sort of baby-step the entire presbyterate through

those things? That's one thing I'm very interested in.

I'd say that you've got to give your presbyterate tools. I see the presbyterate as a living organism. You have new numbers who come in through ordination or foreign priests who join sometimes temporarily, sometimes through incardination. You have members who leave. They may transfer to another diocese. Their religious community may call them elsewhere. They pass away. In between, you have this body of priests who know each other, love each other, at least know they're supposed to work together, and so how do you lead that body as a body, both in terms of the professional dimension of priesthood, but also priests are brothers? And so there's an affective dimension to our relationship with each other.

In my experience, the priests really want to have confidence in the Bishop and in each other, and when their confidence level is low, it hurts them, and so they withdraw not just because they're afraid of punishment or disappointment, but because it's tough for them to be in a situation where they don't feel they can give their best. They look for the environment where they can. How do you build an environment where when somebody has an idea, they don't get shot down by the person next to them i.e. they're listened to respectfully? To know that they're in the inner circle, that they're not going to find out about what's going on through the newspaper.

When that deacon I mentioned earlier got arrested, once we knew and it had gotten to a level where the word had to go out, that e-mail list that I told you about was the first venue for distribution of information, and then I got on the phone

and I called the pastors of neighboring parishes. The reaction I got was, "Thank you so much for telling us because we now have the tools to help our people." So how to build affective and effective elements of unity gives you the groundwork to then help step people through those elements of adoption of a new culture. You have to identify your champions and work with your champions, and then you have to lower the bar to entry so that it's easy for those who are hesitant to jump in the deep end. Others have to wade in the shallow end. You're able to do that by having a shallow end in the first place, little things like that that help you get through the steps of adoption.

**MICHAEL MCGEE:** Bishop, as a diocesan CFO, it's easy for me to do the analysis on a parish balance sheet and income statement and same with a Catholic school. But when we talk about these other programs, especially with many dioceses putting in these very thoughtful plans on the New Evangelization, can you give us some examples of where you've seen ways to help us measure the impact of that? We do a lot of strategic planning and putting programs in place, but it is difficult to really capture that measurement. How do we know we're really being effective?

**BISHOP THOMAS DOWD:** Again, the question of measurement. You know the old saying, "There are lies, damned lies, and statistics." How we interpret the numbers is very important.

There was another parish where some people were talking about it being closed. I discovered that in that municipality, it was the only Christian church, not the only Catholic church, the only Christian church, because that municipality had evolved so

that it was 70 percent Jewish. There was one Christian church and six synagogues. The Catholics who went to Mass and who were sustaining it, it was not that the income statement was small. They were struggling to find their mission, and so on the basis of the numbers, it looked like a vulnerable place, and they had a big piece of empty land that could have been sold for a lot of money, so it seemed like an opportunity as well to sort of close it, liquidate, and run and do something else.

But, on the other hand, we would have been closing the only outpost of the Kingdom of God, the only embassy of the Kingdom of God that was in that territory, and part of their mission, which is quite unique among all our parishes, is to serve as a point of contact with the Jewish community. This is a rare mission for a parish, but it happened to be the mission there. So, of course, the decision was to keep it open, but to get there we had to keep in mind the particular circumstances of place.

The financial measurements are one thing. We have complemented that by doing a very detailed analysis using the results of the last Canadian Census. So we have a demographic portrait of all of our parishes, and we've done a sociological analysis to see where the neighborhoods are. We call them "natural neighborhoods." I'm translating a French concept, *communauté d'appartenance*—a community of belonging.

It's similar to when we travel. If somebody is from Chicago, they'll say, "Where are you from?" They'll say, "I'm from Chicago." But if the other person says, "Oh, I grew up in Chicago. What part are you from?" You start to narrow down. You have a broad community of belonging that you can explain to others, but as you

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*You have a broad community of belonging that you can explain to others, but as you become more familiar, you narrow it down to your natural neighborhood of belonging. And the idea is to make sure the Word of God is being preached in every one of those neighborhoods. You discover some of them are neglected.*

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become more familiar, you narrow it down to your natural neighborhood of belonging. And the idea is to make sure the Word of God is being preached in every one of those neighborhoods. You discover some of them are neglected. We've discovered neighborhoods that if you close the church there, they're not going to go to the neighboring parish because the cultures of the two neighborhoods are so different. Making sure you're not neglecting anybody has a qualitative dimension, which we're doing through the sociological and demographic analysis, which then helps us to parse the financial and make the decisions that we need to make that come down to the money numbers.

**PARTICIPANT:** Bishop, it's a little bit different in Canada as opposed to the United States, but from a best practices perspective, you referenced earlier making sure that the Church takes care of the people and the employees of the Church. People who work for the Church aren't going to get rich working for the Church. From a standpoint of benefits, can the Church do something else as a means of trying to make things a little more just for employees?

**BISHOP THOMAS DOWD:** To put it bluntly, we've got to walk the walk, you know, not just talk the talk. Now, in Canada, it's a bit different. It's a bit easier because we have things like socialized

medicine, which, frankly, takes a huge weight off an employer's shoulders. There are elements of the safety net that we don't have to worry about in that respect, but compensation is important, and not just compensation. The manner in which the people are led, your average person working at the diocese, like you said, they're not making a lot of money. The people who work in the parishes are often doing so for a very low wage. Often, people who are remarkably qualified are in these roles.

I mentioned the demographic analysis. Well, the woman who is doing that for us has a master's degree in geography, but she was working as a parish secretary. She wanted a job that is more flexible with raising her family, so she worked at her parish, had a love for her community, but now even though she's not getting paid what she would be paid for the kind of work she does if she was working in the secular world, she's so happy to be able to use her gifts and talents for the service of the mission, the things that she trained for and she loved when she was doing her master's in geography.

There's an element of justice, which is sort of the minimum bar that we've got to meet, and basic Catholic Social Teaching that informs us. But, beyond that, our staff are already self-motivated by faith and love for the Church. To take it to the next level by helping them discover and develop their gifts, I think, is very important.

When I worked for Ericsson, I had a colleague who was very good at identifying people's talents, giving them things they were good at to do, and helping them develop their next talent. So, in his department, he had fairly high turnover, which normally is a sign of something going wrong, yet productivity and results were fantastic.

I remember talking with him about that, and he shared with me he got called into the VP's office once to say, "How do you explain this?" not in an aggressive way, but just "How do you explain this contradiction?" And he said, "Well, I see my department as a school, so I want the best young ones to come in. They know if they work for me, they're going to get trained up so that their career will advance, and when they leave, I know that I've always got the next best and brightest to come in and take their place.

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*I think the crisis of hope is the key issue we're facing now. There's a theological dimension to it, but it has practical implications.*

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My department is a school. I don't want them to hang around too long, and so I can pay fairly entry-level people to do the work. They do it well. We train them well, and then they become our allies in the rest of the company once they transfer up." So he had high productivity, high motivation, relatively low salaries being paid, and high turnover (which was not a problem, it was an opportunity).

**GENO FERNANDEZ:** It's good that you are already talking about some things that even businesses are struggling



Bishop Thomas Dowd and Fr. Godecker

with now, which is flex work and other different kinds of arrangements. You're a role model already.

**BISHOP THOMAS DOWD:** Well, that's part of, I think, the challenge of personnel in the Church. If the Church is a school of discipleship, how are even our personnel decisions part of the school of discipleship?

**GENO FERNANDEZ:** Let me end with an observation to get your reaction. Many people have described the current state of the Church or world as one of crisis, and you can't fail to turn on the news and be shocked and appalled at what we're seeing. Many people have called it a crisis of faith. I was listening to you talk about evangelization and catechesis, but do we have a crisis of faith in the Church, in your view, and what would you do to resolve it if you think we do?

**BISHOP THOMAS DOWD:** I think when we ask that question, it's because we need to distinguish between symptoms and root causes. Financial problems in a parish, is that really the problem, or is that a symptom of a deeper root cause? When you look at the dioceses, it's going to have a different

analysis. When you look at the Church as a whole—personally, I don't believe there is a crisis of faith, per se. I think that for those who are engaged in the Church, the key issue is a crisis of hope. You know, the three virtues—faith, hope, and love. When I started my blog, it was entitled "Waiting in Joyful Hope," from that line of the old translation of the missal. For me, hope is faith planted in history. It's faith in time, in the moment we're in, and how it's oriented towards the future. It takes the best of the past, but it's oriented towards the future.

Sometimes the reason people are lost is because they don't have a map. If you're lost in the woods and you don't have a map, you have less hope. Just the presence of a map makes a difference—you may still be stuck in the woods, but once you've got your map, you have hope again. We're stuck in the woods right now. Is the problem that we're stuck in the woods or the problem we don't have a map? And so the virtue of hope is discovering what's the map and how to find it.

That's why one of the first things I did was try and create this paradigm, this living document that's Version 10 of the plan, so that we're trying to figure out the map together. The last thing you need

is a group of people stuck in the woods fighting over the map and what it says, so you've got to look at it together.

I think the crisis of hope is the key issue we're facing now. There's a theological dimension to it, but it has practical implications. It's the root cause for all of the other elements.

**GENO FERNANDEZ:** Thank you, Your Excellency, for bringing hope to us in this conversation, and thank you for crossing the Canadian border! I hope they didn't give you any sort of customs problems. Thank you for being so much a role model for many of the things that Leadership Roundtable is trying to spread the good news of and bring our talents to.

**BISHOP THOMAS DOWD:** Well, I thank you. I have to say it's easier to be a prophet outside your home country!

**KERRY ROBINSON:** Not to appear super trendy in light of our discussion and this last intervention, but I began my day by posting on my personal Facebook page about our Leadership Roundtable new website with a comment that said how deeply grateful I was to be part of this important mission, but what I was most grateful for is that the response of Church leaders, more often than not, has been to regard us, quote, "as a ministry of hope." So I thank you for this wonderful discussion.



2016 ANNUAL MEETING

*The Francis Effect and Changing Church Culture:  
Advancing Best Managerial and Leadership Practices*

June 29-30, 2016

Inn at Penn,  
Philadelphia, PA

[leadershiproundtable.org](http://leadershiproundtable.org)

# Changing Church Culture: Institutionalizing Best Managerial and Leadership Practices in Every Parish in Every Diocese

**Jim Lundholm-Eades**, Director of Programs & Services, Leadership Roundtable

**Barbara Anne Cusack**, Chancellor, Archdiocese of Milwaukee

**Jim Herrel**, Parish Administrator/CAO, Catholic Church of St. Ann in Marietta, GA

**Rev. Msgr. William Stumpf**, Vicar General and Moderator of the Curia, Archdiocese of Indianapolis



Jim Lundholm-Eades

**JIM LUNDHOLM-EADES:** To help us explore this question, we have Msgr. Bill Stumpf from the Archdioceses of Indianapolis, Dr. Barbara Anne Cusack, from the Archdiocese of Milwaukee, and Jim Herrel, from the Archdiocese of Atlanta.

Dr. Barbara Anne Cusack is the Chancellor for the Archdiocese of Milwaukee and has been since 1994. Her doctorate is in canon law. Nationally known, she's taught in our Toolbox for Pastoral Management since 2012, and has the distinction of having been the Chancellor of the archdiocese in the U.S. that has been bankrupt for the most years, and so cultural and practical change has been part of her life for many years now.

Jim Herrel is Parish Business Administrator at St. Ann's in the Archdiocese of Atlanta, and he is a former COO and Senior Vice

President in the corporate world, and has been working that job in a parish for 8 years. His parish has undergone transformative change during that time, and he was introduced to us by the CFO of his archdiocese as the thought leader at the parish level in his archdiocese.

Msgr. Bill Stumpf is currently the Vicar General of his archdiocese and has broad experience in a range of areas, including having worked at the Saint Luke Institute in a clinical capacity. His archdiocese has been engaged in significant shift in culture and has a roadmap for change that they are doing in a coherent way in partnership with Leadership Roundtable and also with Lilly Endowment. It encompasses changes in temporal administration, leadership organizational design, and refocusing the chancery, as well as working with the parishes.

**BARBARA ANNE CUSACK:** It's always a pleasure to be with this group, always enlightening, presenting new challenges. I will be speaking from a diocesan perspective. I have the distinction of having been through five episcopal changes; three archbishops, two diocesan administrators. When you're talking about different types of changes, I have seen five different types of changes.

I'd like to look at the process of decision-making and how that happens at a diocesan level and then filters through at parish level. Who is at the decision-making table affects not only what the decisions are, but how they are made. Episcopal leadership needs to look at that decision-making table and see who are the faces that are looking back. Are there only clerics involved? Is there a mix of clergy and laity? Are people present by reason of position or by reason of expertise? How much of a team is that decision-making group? And, yes, it's of great distinction to have been the diocese in Chapter 11 the longest, but as part of that 5-year process, it was very much a team-driven approach. Decisions were made informed from many different perspectives.

None of us challenged the fact that the diocesan bishop is the decision-maker, but different styles of episcopal leadership affect the dynamics of decision-making. Is the time at the table used to provide facts and information to the diocesan bishop who then takes the information away and decides on his own or with a group, not easily identifiable? Is there open discussion of options available and weighing of potential outcomes for various decisions? Is the bishop comfortable allowing the people at the table to be decision-shapers, if not decision-makers?



I have worked with episcopal leadership that was focused on information gathering, and then decisions were made. And those who were supposedly at the decision-making table often didn't know how the decision had ultimately been made. I have been with episcopal leadership where there was a lot of discussion at the table. There were lots of different voices and faces at the table, but the decider found it very difficult to decide, and so the decision-making process went on for a very long time. I've been with episcopal leadership who really do see a team approach as being the one that is most effective and a leadership style that would be offended if the opposition voices were not heard in the decision-making process. I've had episcopal leadership where you really were able to say, "Archbishop, you really don't want to make that decision," and he would stop and reconsider.

The same type of decision-making applies when we're looking at diocesan

curial leadership, but also with various advisory groups, for example, diocesan finance councils. I am surprised when I talk to colleagues and I hear that their diocesan finance councils really have no statutes that guide how they function, that information is filtered to the diocesan finance council, that decisions are made, and only after there is publicity about the decision do some of the members of the finance council even know what the decision was. We have to have transparency and communication. The same thing has to be done in the decision-making processes that we use as the diocesan level.

**JIM HERREL:** I want to promise you that these remarks were written before I got here, and I just haven't been cherry-picking the keywords and elements out of what the other people have been saying! Rather, I think what you should extract from that, as I come from a parish, is that what we're talking about in theory when we talk about these issues,

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that at the parish level, they can make a difference. My role on this panel is to show how embracing these leadership and management principles can improve the parish's ability to meet its mission and to meet the challenges that have been set forth by Pope Francis.

The Archdiocese of Atlanta has challenged the parishes to reach out into the lay community and find leaders who are qualified to assist in the leading and management. Our parish, for example, has two C-level executives, my staff and my cohort who is a C-level executive at UPS.

A little bit about St. Ann's, because I think what we've done shows how employing these principles has worked. We are the sixth largest parish in the Archdiocese of Atlanta in registered families, and we're the fourth largest in offertory. The median age of the adult population in our parish is 45 years old, compared to a national average of 49 years old. As a matter of fact, the median age of new parishioners in the last 4 years is 39-1/2 years old. We are getting younger as the Catholic Church as a whole is getting older. We're a growing parish.

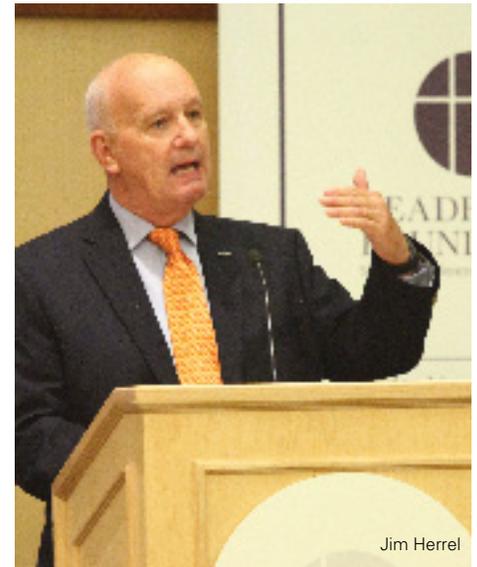
Ten years ago, a mission parish was opened about 5 miles from us, and our registry dropped down to 3,200 families. Today, we are again at 4,500 families, and we're annualizing at a real growth of about 3 percent. We're staffed by a religious order, the Missionaries of Our Lady of La Salette, and we find that to be an advantage because as pastors and priests come and go, the charisma that they bring from their order to the parish remains, and that is a significant thing because it gives the parish a reason for being.

Today, I want to touch on a few key points built around engagement, and

engagement is getting people to belong, believe, and become disciples of Christ. In August of 2012, Pope Benedict affirmed the direction that St. John Paul II set, along with the Vatican Council, in asking the lay faithful to take a critical role alongside the clergy in the being and activity of our Church. This calls for a change in mentality, where the laity are no longer considered collaborators, but they are co-responsible for the Church. No longer can we the laity sit on the sidelines and watch. Our faith is not a spectator sport. It requires involvement. It requires us to be part of it.

How does co-responsibility manifest itself at the parish level? Our pastor had spent 13 years in provincial administration. He was the provincial of the La Salettes at one time, and when he came to St. Ann's, he was anxious to get back into relational ministry. One of the first things he did was change the parish council to a pastoral council. Now, you may ask, "What's the difference, or is there even a difference?" And let me just tell you, a parish council by its nature seems to take on a governance mentality, if you will, much like what our Protestant brethren have in their congregations, whereas a pastoral council is asked to take on a visioning rather than a governance approach to what they do.

Let me give you an example. A parish council, in our case, would walk down the hallways and say, "Hey, the hallways need to be painted." They'd come together. They'd have a big discussion. They would decide somebody would recommend a color. They would vote



Jim Herrel

on the color, and then they would give it to staff and say, "We want them blue, and make them blue." A pastoral council would take a more visioning aspect to that, and they would walk down and say, "You know, we want our parish to have an inviting and welcoming atmosphere to it, an environment that invites people to be here," and when they discussed this and came to a consensus, they would pass the vision on to staff not with all the details, but with the vision, "This is what we want to create." And it would be up to staff to do that. This at St. Ann's was a critical step, as it led to a body whose main goal and purpose was to engage the congregation in becoming disciples.

Second is the importance of relevancy. While theatrics are a significant part of the growing non-denominational churches, the key to their growth is delivering the messages relevant in today's world. We are steeped in tradition in our liturgies. The Eucharist, the source of our faith, clearly differentiates us from other

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religious denominations. However, we strive to make the entire liturgy relevant. The gospel message must be tied to what is happening and relatable to our parishioners and in their lives today. Homilies must be engaging, not simple Bible studies or lessons in theology, and the music, is the water, the lifeblood of the liturgy.

To accomplish this, we have a liturgy team—clergy and laity, and actually, there's more laity on the team than there are clergy—and they come together biweekly. They read the readings, and then they come up with a consensus of what the theme for the next upcoming two weekends will be. The theme is woven into every part of our liturgy. We're fully immersed in it. The bulletin cover has a full-page message on the inside with family-oriented questions, the welcoming screens, the music, the homily. Everything ties together in a cohesive message that ties the gospel values to the lives of people today.

Now, while each priest brings their own perspective to the homily and to the message, the message is the same at all eight liturgies. Whenever you come, you're getting the same message. Changing culture begins with delivering the message in a way that people are open and responsive to it.

We've talked about communication, and the world has changed dramatically in how we communicate. Everything is

now. It's experiential. Social media, video, lighting at Masses, how we maintain our grounds and facilities, the music we choose, the staff we hire, all of those things communicate what we hold as valuable. If evangelization is going forth and proclaiming the Gospel, what is the difference between evangelization and marketing? I came from the business world. What's the difference? Nothing. Nothing, except the product we are delivering is the greatest product ever, and we're bringing it to those people that haven't been exposed. We are taught to be humble, and some may call it bragging, but when we share how we are living the Gospel values, how we are bringing Christ to others in the world, we are delivering hope.

One simple post on our Facebook page about the Christian response to social justice reached over 930,000 people. We have a weekly newsletter that focuses on the ministry that we're doing and how we are working to change lives, and by its nature, it invites our parishioners to become part of it to engage themselves and being disciples and ministers to those in need. We use video. Video does things that simple words spoken cannot. They're used to enhance liturgy when it's appropriate and to deliver the message through our newsletter and other means and to bring this message in a way that we otherwise wouldn't. To date, we've had over 66,000 views on our YouTube channel of our videos.

We also stream two Masses weekly and other special events. The first time we

did this—on Sunday we were having First Communion, and on Tuesday, I called in the AV and the music director and said, "By the way, we are going to live-stream the Masses, and we are going to announce it at practice tomorrow night." And they said, "How?" and I said, "That's your job. My job is to come up with the idea. Your job is to make it happen." On that channel, we've had 58,000 views of people tuning in. All of this is designed to bring God's message to the world.

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***The mark of a great church is not its seating capacity. It's sending capacity. It's how we reach out into the world.***

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In today's world, running a parish is significantly more difficult than in years past, and I think we've all heard that. No single item is the answer. It takes teamwork, and it takes vision. If you're a priest, there are more demands, and a need for more transparency, another word we've heard quite a bit of because of past indiscretions, both fiscally and with the other things that have gone on. Changing horizons require skills more extensive and quite different from those taught in seminary. Co-responsibility means that each of us, clergy and laity, utilize the gifts that we have been given from God to bring his love and message to the world.

Good management and leadership leads to accomplishment. In our case, clergy and laity management was that catalyst that changed a 29-hour part-time bulletin job into a communications department. It took youth ministry in our parish from one full-time to three full-

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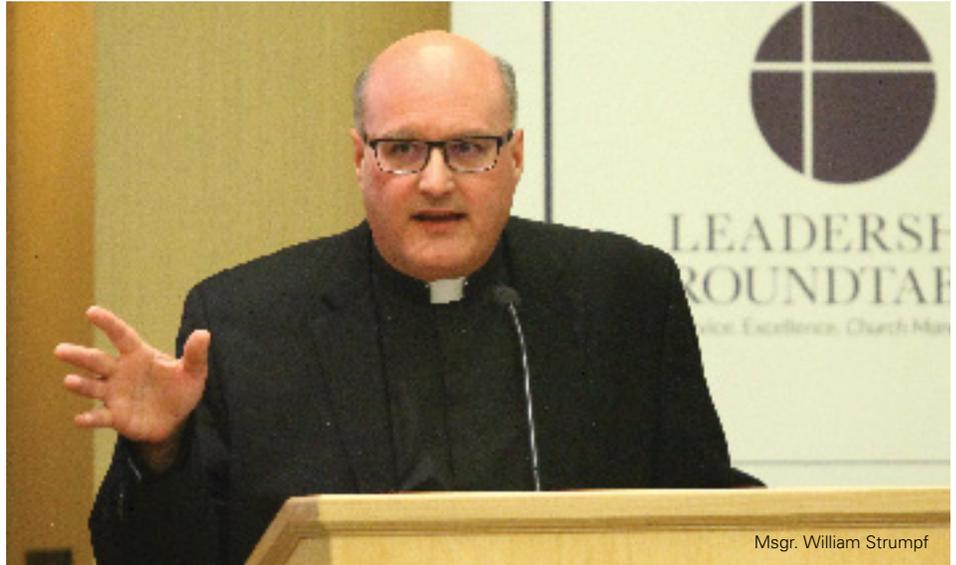
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time youth ministers. It allowed us to expand our pastoral care, our music and liturgy departments, and it allowed us to become debt-free with a million and a half dollars in our savings. Instead of being overwhelmed by the business aspects of the Church, we embraced them through this co-management, co-responsibility, to maximize our ability to meet the mission. Mission is about people. The mission of the Church is missions.

The mark of a great church is not its seating capacity. It's sending capacity. It's how we reach out into the world. Everything we do, everything, must move us closer to accomplishing the Church's mission. If it does not, we're doing the wrong thing.

**MSGR. WILLIAM STUMPF:** I was asked to talk about an endeavor that we're engaged in in the Archdiocese of Indianapolis to try to empower and strengthen leadership and pastoral leaders around management and leadership skills. One of the ways that we have been able to do that is—we are truly blessed—through a 3-year, \$1 million grant from Lilly Endowment. That has been a wonderful gift to our Archdiocese. I want to give credit to a priest who's here from our Archdiocese who's been the driving force behind that grant, Fr. Jeff Godecker. If it wouldn't have been for all of his hard work, we probably would not have been blessed with that grant.

In starting that whole process, we heard early on that you need to find out who you are, and so we conducted a series of interviews with 50 of our pastoral leaders—and that was not only pastors, but also what we call in our Archdiocese, parish life coordinators. They would be lay pastoral administrators and also some of our business managers and other pastoral leaders. It revealed to us some key findings.



Msgr. William Strumpf

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They're not unique or new to us, but it was good to have those confirmed for us as we started that process. And I want to highlight a few of those things that we found out through that interviewing process.

One of the first things we found out is that three-fourths of all of our pastors and our parish life coordinators expressed that they had a lack of financial and leadership training, and well, those kinds of skills were not part of my seminary training or they were not part of my theology studies. They articulated that that lack of understanding has created a great deal of difficulty for them, or at least made their pastoral leadership more challenging.

Another thing we realized in the midst of doing this is that we're changing as an archdiocese, just like every diocese, and we now have over 300 lay ecclesial ministers serving in our parishes. Because of that, the role of the pastor or the role

of the parish life coordinator, continues to change. Most of our pastors and parish life coordinators are finding out in the midst of that role change that they are now supervisors. They're also finding out that they are team leaders, and we are also finding out that many of those folks feel very unprepared for that change of role that they are experiencing.

I was ordained 31 years ago, and I was thinking about the parish staff that I was a part of 31 years ago. It was a large suburban parish for us. It had 1,700 families. There was my pastor, myself, a principal, director of religious education, a bookkeeper, and a couple secretaries, and I think somewhere in there, we hired a youth minister. That size staff was actually smaller than the staff that I most recently had before I was named Vicar General in a parish that probably only had 1,100 families. So parish staffs are becoming much larger as we go along.

I was also thinking back, 31 years ago, no one ever talked about performance reviews. I don't even think there were any kind of job descriptions at that time. There might have been maybe for our school principal or maybe for the director of religious education, but that was a language and an experience that was not part of the Church life at all. So it goes almost without saying that pastoral leaders are finding that their lives are very, very different these days. Parish life and parish leadership is far more complex, and because of that, it's pretty obvious that new skills are needed. A new skill set is actually needed, particularly in the areas of management, also in financial literacy, also in fund-raising, and also in stewardship.

So we figured out where we were, and then we said, "Well, where do we want to go? What do we want to have happen for our pastoral leaders in the Archdiocese of Indianapolis?" And we definitely knew that we wanted them to be strengthened in their leadership, and that they would be better, and not only better, but excellent pastoral leaders. We're now implementing a number of different initiatives, and I would like to share a few of those with you because I think we're so blessed to be able to do that.

The first thing that we're doing is inviting our pastors and parish life coordinators and eventually our business managers and some of our pastoral leaders to participate in the Roundtable's Catholic Leadership 360 program. We had our first cohort this spring, and for me, what was such a wonderful thing is our archbishop did it, and he is the first bishop in the United States to go through the process. It's not only the Archbishop, the Chancellor, myself, all of the deans of the Archdiocese—we also picked out some other key pastoral leaders, and now we're

already forming together for a second cohort to go through that in the fall, and we'll continue to do that in future years. We're also going to be inviting all of our new pastors and parish life coordinators to participate in the Toolbox for Pastoral Management, and I think that will definitely give our new pastors and our parish life coordinators some of the skills that they really need in their pastoral leadership.

Like all places, our parishes, our dioceses, we're always facing issues around funding, and we certainly know that's a very critical element in all of our lives because if you don't have funding, you can't go about bringing about the mission. So we decided to partner with the Lake Institute and are inviting any of our pastors and parish life coordinators to participate in a program called Creating Congregational Cultures of Generosity.

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One of the things I'm most excited about is that we're doing something within our own Office of Stewardship and Development, and are creating our own hybrid project. It's just in the discussion stages, but the idea will be to go out and to work with all of our parishes in terms of helping them with stewardship programs for their parishes, particularly, to increase Sunday offerings.

And while the funding from Lilly Endowment has been an extraordinary

thing, one of the other great blessings of receiving this grant is it's given us a focus as an archdiocese. It's given us a rationale for going ahead and doing this, and we probably would not have done that if we didn't have this opportunity for the grant. Like I said, the money is important, but I think it's drawn us all together and to be focused in trying to bring about an education of all of our pastoral leaders.

Certainly, this is going to be met with challenges. It's going to take a good while, probably more than just the 3 years that we're going to be engaged in this grant, to change the culture in our Archdiocese, but I think we're truly blessed, and the nice thing is that Lilly Endowment is already now starting to engage with some other diocese as well—Chicago, Louisville, and Lafayette, Indiana. Hopefully, as we start this and it continues to morph across the United States, it will make a really wonderful impact.

# Participant Comments

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**JIM LUNDHOLM-EADES:** One of the elements that struck me in each of your presentations was the role of knowing what your end state is, knowing where you wanted to get to. I have been engaged with the leadership of the Archdiocese of Indianapolis for some time, and the clarity with which the entire leadership of the Archdiocese could express the end state they're looking for impressed me. Jim, in what you were speaking about, what struck me was how quickly you rattled off metrics for what you were doing and how that related to the end state that you are looking for. Barbara Anne, when you spoke of the different leadership modes that had existed over five generations of leadership in your Archdiocese, each had the common thread of where there was engagement, it was transformation versus where there was either an absence of leadership or an underdeveloped leadership.

Those themes of engagement, leadership metrics, and knowing where you're going seem to be threads throughout what you said. Have you noticed how those hang together in where you're trying to go as a diocese or a parish?

**JIM HERREL:** Coming out of corporate America, we obviously had KPIs, key performance indicators. We had goals. We had strategic plans. We knew where we were and where we wanted to go, and we annually did a 5-year plan. We did an assessment. We went out and did some surveys within the parish. We looked at

where we were, what we were doing, and then the pastoral council took that information, and it developed the vision for where the parish was, co-responsible. They looked at the needs of the parish and how we could affect that from a staff level and from a clergy level.

When I first got the job, the diocesan CFO gave me a Leadership Roundtable publication titled *The Church In America: A Resource for Parish Planning*. He said "This is your roadmap. You're not in corporate America anymore," and I went through it. There were 10 checkpoints for a parish and I started going through and said, "Okay, we're going to do 10," boom, boom, boom, knocked them off. When are we going to do them? How are we going to do them? And those were key to getting where we are today.

**BARBARA ANNE CUSACK:** I have a concrete example of knowing where you need to go. As we all know, Catholic schools are often in crisis across the country, and in the Archdiocese of Milwaukee, that was not very different, even though we are very blessed to have a parental choice program that's now effective throughout the state. We were looking at where do we need to go with our schools, so it's not one merger of a school with another, another closure of a school. The right people were brought into the room, people with business experience, people with educational leadership experience, and we developed what is called the Seton Catholic Schools. It is a program whereby the management of the schools is brought together under one umbrella, driving down the walls that divide schools, so schools are no longer competing with one another. All of the teachers are now employees of Seton Catholic Schools rather than employees of the parish.

We will have academic standards. We're dealing mostly with the city schools in Milwaukee right now. Eventually, it will be a network of 23 schools. The motto we have is "Good enough is not good enough." We were looking at the academics in our challenged schools with a challenged population, where we've always recognized that we're real missionaries in the city. Ninety percent of the Catholic school children may not be Catholic, but that doesn't mean we don't need to have a Catholic school there. And so we were breaking down the challenges between parishes. A parish needs a principal. Where do they go? They go to steal one from another school. All principals will now be managed and supervised and evaluated by the Seton Catholic School system.

In the transition of leadership, raising up younger teachers and beginning to designate which ones have that kind of leadership potential to be principals, you can imagine it took a lot of planning and calming people down. There was a lot of handwringing of what was going to happen, but at the same time, we see it raising the level. Through this initiative, all Catholic school teachers' salaries will be raised to a competitive level. There will still be sacrifice to be a Catholic school teacher, but not as much sacrifice. So we had a goal in mind, and that was to raise the level of the Catholic schools to make sure that they survived, and seeing the vision, we brought the right people around the table to make that decision happen.

**MSGR. WILLIAM STUMPF:** As I listen to you, you also recognize that you couldn't stay where you were, and I think that's also happened in the Archdiocese of Indianapolis is that, like in all dioceses, with less clergy and also with other stresses that parishes are facing, you

cannot just keep operating the same way, and so you have to make the best use. You have to come up with a new model to be able to implement what you want to happen to carry on the vision and the mission, and I think that's what you're trying to do and I think what we're trying to do through our parish efforts right now.

**JIM LUNDHOLM-EADES:** We see that constantly as we go from diocese to diocese where, say, with the schools here or the examples of the parishes in the Archdiocese in Indianapolis, there's really three parts to cultural change. One is there are some structural pieces you've got to put in place. We need to align how resources are distributed. That's organizing people, money, and places to the new state. Two, being able to articulate the end state of the culture you're trying to create, and it's the alignment of structure, distribution of resources, and the knowledge of where everybody understands at the highest level to the lower level, where you're going, being able to articulate that. I've worked with a lot of chanceries which we regard as best-practice chanceries. One of the differentiators between them and other chanceries is if you talk to the chancellor, the archbishop, or the janitor, they can tell you why they're doing what they're doing. And that alignment makes

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*We need to align how resources are distributed. That's organizing people, money, and places to the new state.*  
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a big difference in change in culture. The third is that leaders undertake ongoing development of the competencies that allow them to adapt to the new culture, to achieving the clear end states of the organization, and to change itself.

**JIM HERREL:** One thing we need to realize is that we are living in a changing culture all the time. What we're trying to do is continue to keep up with those changes. The skill set I had from corporate Americas is what I brought to the table, but the direction was clearly articulated by the diocese, by the archbishop, by the CFO. What was expected of us and how we were going to move forward to get where we were going to go, and the metrics are an important part. The measurement is an extremely important part.

Msgr. Stumpf was talking about an offertory enhancement program. We for the first time, 2 years ago, had a decrease in offertory. It was shocking. We had never

had that. So we did an analysis, and we went through and said, "Where are we falling down?" I told you that our parish is getting younger, and what we found was the older people—my age group—we gave because that's the way mom and dad did, and that's the way grandma and grandpa did. And we were doing what we were supposed to do. Our millennials were giving, but they don't give institutionally. We had to meet the challenge to explain to them why they should give part of their giving, their discipleship, their stewardship to the Church. That we were doing the things that they were asking of, instead of giving it to this charity or that charity, that we're doing that, and we just needed to deliver that message.

**JIM LUNDHOLM-EADES:** I want to outline six signs that the Church has changed from what it was 11 years ago when Leadership Roundtable started its work, six signs of hope.

What we see happening in dioceses and in parishes is the alignment of structure, resource and culture, around the five pillars that were outlined by Elizabeth McCaul—transparency, governance, regulatory compliance, quality, sustainability (*see page 31*).

We see that dioceses and parishes are employing different people than they used to. If you look at the membership of the Diocesan Fiscal Management Conference today and the qualifications of those diocesan CFOs, it's entirely different than what it was. That's a sign of cultural change.

We see work by the Church, with engagement and interest in best practices upstream. The evidence for that is how many schools of theology and seminaries have approached Leadership Roundtable



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to do pastoral management training with their alumni and even with their seminarians. Three years ago, it was the opposite. We now have 12 seminaries talking to us, of which 4 have engaged in programs for pastoral management through the Roundtable.

When we started having conversations with Church leadership, we would have to invest an enormous amount of time as to why pastoral management and best practices management were important to the Church. That's a conversation we don't have anymore. It's much more about the "what" and the "how" as the starting point, and that's a significant change.

The engagement of professionals is another hopeful sign. There's one diocese I know that is very proud of the fact that somewhere between 60 and 70 percent of the entities of the diocese—the schools, the parishes, and so on—have professional business managers with corporate experience. That's regarded at a very high level. Generally, they report when they talk to other dioceses it's somewhere around 40 percent, but the fact is that number is growing and has grown dramatically.

When I go to dioceses around the country, what I notice is that they are able to articulate the best practices they want to embed in their dioceses. They are able to talk about financial controls. They are able to talk about human resources management. That's a language that wasn't there 10 years ago. It's signs like this that give me reason for hope that Leadership Roundtable has had some impact on all of that, but it's really being driven by the leadership of the Church. I have to say that the bishops I spend time with are interested, engaged, and really want to become involved in best practices

in the Church. That is evidence of cultural change in the Church over the last 11 years since the Roundtable started.

Msgr. Stumpf, in the planning that you did around change in your archdiocese, what was the level of engagement of the priests? How did you get the clergy engaged in the changes, and aligned with the changes that you spoke about?

**MSGR. WILLIAM STUMPF:** It's a process. We gather all of our clergy and pastoral leaders together twice a year. We introduced to the presbyterate back a year or so ago, that we were engaged in this, and then we keep putting it before them, keep encouraging them, and then we're also really hoping now that we have one cohort through the leadership development process, that they're also going to be ambassadors to get other priests to want to do this, other lay people to want to do this.

**FR. JEFF GODECKER:** One of the strategies that we have is to engage the leadership clergy first, so archbishop, vicar generals, deans, and so forth, and hopefully, the significant leaders amongst the clergy will be the ambassadors. When we first started we did get some pushback from the clergy, and the pushback was "you're just giving us more things to do," which is kind of the typical clergy response right now, and I've been there, done that. So, okay, let's just have everybody say what they need to say and continue moving, so that there's much less pushback right now. I think one of the things I find with the clergy, as you do with most people, if you let people complain and then you just kind of keep moving, there's a little shift.

**BARBARA ANNE CUSACK:** I shared this at our table, that we introduced Catholic

Leadership 360 as well. I brought it to our priest council, thinking that's a logical buy-in group, and I thought we were just going to move straight through, we'll get our first cohort set up. Well, they did the deadliest thing you can do with the new idea. They sent it to committee. It bounced back from committee to full council for a year. At the archbishop's request I attend priest council meetings, and I kept watching this and I was getting dizzy. So I went to one of our newest diocesan staff members, a young woman who has her master's degree in leadership, and I said, "Michelle, you've got to get this to work." And she got excited about it. She went out to every deanery, met with them, explained it, finally, in a way that they understood what it was all about, and she walked away with the first ten members of the cohort.

In our case it wasn't the clergy encouraging the clergy. It was this energetic young woman who was out there that got them engaged. It can happen in lots of different ways.

**MSGR. WILLIAM STUMPF:** I wanted to make a comment that in terms of talking about how we're going to get the presbyterate or different pastoral leaders to be engaged in this type of process to become better pastoral leaders. I think, in addition to working with the people we have now, we need to be doing something with our seminarians and people in formation. I'm not saying that we need to be focused on trying to turn them into administrators already. I mean, the seminary curriculum is so full. But we really need to help them have a theological understanding that management is a key part of being a priest or a minister or a pastoral leader. That's the piece that's missing in seminary that I hope that we can help people understand, because if you can get them to buy into that, then

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*We really need to help them have a theological understanding that management is a key part of being a priest or a minister or a pastoral leader.*”

when they're ordained and they're placed, then you can get them to become more engaged, I believe, in the type of programs that are out there to enhance their skills.

**THOMAS HEALEY:** This is for Barbara Anne but I hope everybody can answer it. Bishop Dowd, at lunch, talked about spending three years learning his parishes. Jim's archbishop has been there at least eight years, something like that. Msgr. Stumpf described Archbishop Tobin as having been relatively recent three and a half years ago. How do you cope with five bishops in five years? How on earth do you figure out where you're going, when that much change is occurring, and you don't know who is saying how you're doing and it may change next month?

**BARBARA ANNE CUSACK:** I didn't have five in five years. I've had five in all of my years at the archdiocese. Again, there's some consistency. We had an auxiliary bishop, Bishop Richard Sklba, who was there through it all, is a great leader, and he had the trust of the people and he had the trust of the clergy, so he was a consistent element.

Now remember, Archbishop ListECKI, our current archbishop came in following "Mr. Dynamism," then Archbishop Dolan, and he knew right away, "I can't out-Dolan Dolan, so I've just got to be myself. I'm the kid from the south side of Chicago and that's all I can be." So he had no delusions of what his leadership was going to be. It was going to be his own.

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On his first anniversary of installation was the day he announced that we had filed for Chapter 11. Happy Anniversary, Archbishop! But it was his leadership through that very critical time that was significant. At every meeting he would say, "All I ask of you is prayer and patience," and that became his theme through those five years in Chapter 11. Part of the reason it took five years was because we felt that truth had a place at the table and that we were not simply going to cave in and say a whole lot of things that weren't true. We weren't going to say that parish assets were the assets of the estate. They weren't. The parishes are separately incorporated. They've always been treated that way. They elect their lay trustees.

Truth had a place at the table that not every claim that comes forward is a claim that was relevant to the Chapter 11. In that pursuit of truth there were lots of legal fights that had to take place with lawyers on the other side charging \$650 an hour to argue, only to have the judge come back with the conclusion that we had presented in the beginning.

We had laid the groundwork to have a diocesan synod, thinking we'll be out of bankruptcy by June of 2014 and then we can celebrate a synod. We had a synod while we were in the midst of Chapter 11, and it was one of the most dynamic events we had in dozens of years, and that synod leadership, that synod momentum is what's moving our archdiocese forward. Those are just some anecdotal ways in which a leader moved forward, even in times of crisis.

**JIM LUNDHOLM-EADES:** Tom, to your question, when I've spoken to bishops and when you gather bishops, many bishops will tell you that as soon as they take office they're asked, "So what's your vision?" And the fact is they don't know. And the process that I've heard described by many bishops is it takes about three to five years—just think about that. They spend the first two years learning what it's like to be a bishop. Then they learn about the diocese. They work out what their vision is first by a process of elimination, of "I know what I don't want."

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*That synod leadership, that synod momentum is what's moving our archdiocese forward.*”

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Working at what they do want needs the engagement of their senior staff, their cabinet-level, their priest advisors, their deans, their presbyteral council, et cetera, to help the bishop move beyond "I know what I don't want." That's where the advisors have a key role in working at what they do want, articulating the opposite side of that coin. Because it's very engaging process that involves a lot of very personal reflection, it's a three- to five-year process. That's anathema to a corporate background world, where a CEO comes in. It's a different process. But I've heard that kind of process repeated by bishop after bishop.

**BISHOP THOMAS DOWD:** As a bishop, I just want to react to your observation about the three to five years to develop the vision. I agree with you. That is the way it often works. I heard the question, "Bishop, what's your vision?" a lot. I remember I was just a bishop-elect at



Barbara Anne Cusack, Jim Herrel, Msgr. William Stumpf and Jim Lundholm-Eades

a wedding and somebody came up to me and said, “So what are you going to do to get people to come back to church?” Pope Francis talks about a kind of a hidden clericalism, and sometimes the assumption “bishop knows best” is the flip side of that. “Bishop, what’s your vision?” is a very good question. The better question is, “Bishop, what’s our vision?” which you don’t always here because there’s a presumption that the vision belongs to one person instead of the community, the group. And the pressure on the bishop to come up with his vision, which he wants to do to be a good bishop and respond to the question, is maybe not the healthiest reflex either. My answer to the question of “What are you going to do to get people to come back to church?” was, “I think the bigger question is what are we going to do?” He was startled by the answer. But there’s a different way of looking at the vision question. I think that’s important, that we’ve got to develop a new reflex around that.

**JIM HERREL:** That was a co-responsible response. It takes that responsibility of the laity also. That was very good—what are we going to do?

Working with Archbishop Gregory it’s always, “What are we going to do?” and it is a very open forum. On the finance council and the different councils I’m on, it’s always an open forum. We can disagree. We can agree. We can say what we want to say. But it also then comes back to, as was said earlier, communicating the vision. Leadership is getting people to do what you want them to do, because they want to do it, and the only way they’ll do that is if they clearly see where the end path is, and presenting that to the priest council or whoever it is, and articulating that in a way that they buy in is a real key.

**FR. BOB BELOIN:** Having talked about change of culture, and mentioning seminaries, we heard this morning that the Peter’s Pence collection gave a report of income but not expenditure, and the question is, why? I think the answer to that is because there is no such thing as accountability in clergy. Talking about seminary training, you’re evaluated in each step going to ordination, but priests know that once they’re ordained they’re not accountable anymore. If a priest is ordained and never reads a book, never goes on retreat, he’s not accountable

to anybody. I’m wondering, how do you change a culture that brings accountability in the life of clergy?

**MSGR. WILLIAM STUMPF:** I don’t have a set plan for that but I can tell you some of the things that Archbishop Tobin is doing in our archdiocese. He’s strengthened the role of the deans, so now they’re taking on more of a leadership role with the priests in their deanery. He also has every priest now coming in to meet with him during the month of their birthday, and he is calling forward some real issues about accountability. Are you going on retreat? Do you have a spiritual director? I’m not saying that this is all that needs to be done but it’s beginning to change that culture. We’ve never had a bishop do that before in Indianapolis—and it’s done in a very nice way. It’s a good meeting, but he’s just started to put questions before them that, in my 31 years, I was never, ever asked.

**JIM LUNDHOLM-EADES:** If I was to ask people who work in dioceses here, how many of your dioceses have directors of ongoing formation for clergy, or the equivalent of that? How many of you have that? If I’d asked that question 10 years ago, hardly a hand would have gone up. I would propose that dioceses have appointed staff to structure that in. I see that increasingly around the country, that they’re putting ongoing formation structures in place. Sometimes it’s in name only—that’s as far as they’ve got. Others have it highly structured. But that landscape is changing dramatically. The question I’d have for the panel, and perhaps other people, would be do you think there are generational differences in that amongst clergy?

**MSGR. WILLIAM STUMPF:** I can’t say that I have noticed that right now.

I see the same sort of attitudes in the young as you do in people in my age group too. Everybody wants to think that once I get out of seminary I don't have to do any more. I think it's an across-the-board cultural change.

**GEOFFREY BOISI:** I come from a world of sources and uses of funds and capital allocation, and carrots and sticks, and I'm trying to figure out what the analogy is between the diocese and the parishes, in terms of whether it's capital, human resources, or something. What is it that's going from the diocese to the parish that could be used as encouragement or discouragement, depending on what you want, in terms of the evaluation process or some of these other things, in order to get resources to help the parish accomplish the mission it is set out to accomplish?

**MSGR. WILLIAM STUMPF:** I can tell you some things we've tried in our diocese, and I think we're moving back in this direction. When I was a younger priest we used to have our own internal process that our priests went through to be evaluated. Basically, you had an evaluation at the end of your six years of your first term, and that was a pretty broad-based evaluation survey that was done with your parishioners and staff, and another priest walked you through that process and that information was given to the bishop in a summary format, and that was used as a decision-making piece for whether or not you should return to that particular parish. I think it's still an uphill battle, though, around those issues.

**GEOFFREY BOISI:** What are the resources that are coming from the diocese to the parishes that are critical to the life blood of the operation of the parish?

**BARBARA ANNE CUSACK:** We don't have a lot of financial resources to share—but we have personnel, for example, in the finance office who are parish and school finance consultants, and every one of our parishes must go through a financial review. This is a two-person office and they train others to go with them, and they go in and they do a review of the parish finances to try to see if there are problems that the parish is too close to see. We bring some human resources to that. We have staff who are HR experts and are dedicated solely to school and parish personnel issues, so the parishes and schools make great use of those kinds of resources that can come to them so that they don't find themselves in trouble in some way.

**JIM HERREL:** In our diocese, every parish is audited every 2 years. We go through an audit, and the audit is not just a financial audit but of our human resources activities as well. A report is then generated, and the report goes to the chair of the finance council and to the pastor and it's shared, and it is done in a way that is more of a teaching. If you find something that's drastically wrong you obviously take care of it, but you're looking for those risk assessments and those issues that people need help with. And again, somebody mentioned earlier the different size parishes have different capabilities to do things. Segregation of duties at a small parish may be this person has the first number of the safe combination, I have the second, and they have the third, as opposed to another way of doing it in a larger parish.

The real key I see is that we aren't communicating effectively of the resources that are available at the diocesan level, and how to use those.

They don't have the resources to go out to 100-plus parishes and manage all those parishes, and do those things for them.

**BARBARA ANNE CUSACK:** Talk about cultural change, we're in the midst of a process right now of developing teams from the central offices that can go out to parishes, not just in crisis moments. The culture has been if there's a crisis at a parish we quickly put together a team, the team goes out, the team helps manage the crisis. We're now looking and saying, let's turn that around. Let's have teams that can go out and help good parishes become better parishes. But it is a cultural shift. We're not responding to crisis. We are trying to raise the level of parish life.

**MARCOS RAMIREZ:** In my experience I've also seen crisis is the impetus for action. And when we talk about another question, what are some of the drivers that may help institutionalize some of these changes.

In my experience I go back to time, talent, and treasure. In my work with Catholic schools we try to enhance some of the fund development capacity and the marketing capacity with the assumption that those two would increase sustainability for Catholic schools, and the feedback from principals was, "I don't have the time, I don't know how to do it, and I don't have the money to hire a fund development or marketing manager. So

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*The Archbishop started to put questions before the priests that, in my 31 years as a priest I was never, ever asked.*  
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unless we have access to any of those three, I won't be able to do much."

I've heard that also from the parish level, and I think in that relationship, going back to the interactions often between dioceses and parishes, even some dioceses that have tried to come in with the finance committee to do an internal audit of the parish, or the school, and they say these are the standards for becoming at par with the standards of the diocese. I've also seen parishes and schools that say, "Thank you, but no thank you," and the diocese says, "If you do all these things you will have access to the diocesan fund, to help you institutionalize some of these changes," and they say, "That learning curve is too steep for us and I don't see the broader comprehensive support to be able to do that."

So my question is, hearing about the Lilly Endowment, do the resources have to come from outside the system in order to effectively create the appropriate driver or impetus for that internal adaptation?

**MICHAEL BROUGH:** Of the three archdioceses featured on the panel, two of them it's all internal investment within the system, and the one that is outward, which is the Lilly Endowment funding, it's a matching grant, so they also have to invest themselves. They have to have skin in the game in order to receive the grant. I think the direct answer to the question, in our experience, is it's absolutely internal within the system. It's about prioritizing what we're using our current resources for, and whether we're using it effectively for long-term capacity-building.

**JIM LUNDHOLM-EADES:** Our experience has been that a number of things have to come together,

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one of which is some catechesis of the diocese—I'm talking about the presbyterate and the laity—around the proper relationship between bishop and priest and bishop and presbyterate. When that's healthy, a lot of other things fall into place because the Church operates not by mandate but by influence, and the relational influence of the bishop is key to that. So that relational piece, in proper relationship with each other, is a key to success in that.

The second thing is that when we differentiate between best practice chanceries and the rest, one of the key differentiators is that the chanceries that demonstrate best practice are capacity-building oriented. Their whole structure, their resources are designed specifically around how to build the capacity of parishes, whether it's in best management, in temporal administration, or in some ministry areas of focus. But it's capacity-building. It's an orientation of the chancery staff that it's about them, not us. So when the chancery comes in, they are genuinely there and their whole mental framework is oriented towards moving capacity within the parish.

The most dysfunctional diocesan offices you see are about control. Putting controls in place is good and necessary, for example, in the financial area. That's necessary in certain areas and in certain ways. But the fundamental framework,

when it's capacity-building, looks after a lot of things that the governance function, that the bishop is what's enhanced by the chancery, rather than his management function. So that's boundaries and direction. That's one of the key differentiators we follow.

The other external influence is when you've got a set of standards by which you operate, you solve a lot of problems. One is, for example, we have the Catholic Standards for Excellence. They give the bishop and the pastor the cover for improving how they manage the parish and the diocese. That is, we've decided to adopt these standards. Therefore, X, Y, and Z follow in our implementation of that, and that makes a significant difference to the multiple levels of a diocese. The Catholic Standards for Excellence are a set of 55 standards that enable a parish or a diocese to measure themselves against best practice, and that's a very important resource, from our perspective. It actually underpins everything we do.

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# Table Discussion

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## Themes from Table Discussion Question #1

### **What best practices did you hear that might be applied to your parish, diocese or organization?**

Including deal-closers and a variety of skill sets in decision-making process

Offering business training to parish leaders - priests and lay alike - with an emphasis on pastoral practice

Employee evaluation at both parish and diocesan level

Getting key people in the right positions at the right time (with the right incentives)

Jesuit formation is looking to “right-time” their formation to the Jesuit’s immediate managerial and leadership needs

Importance of thinking across generations; some kinds of leadership and managerial practice actually have to die for the new to rise

Must be both top down and bottom up; choosing one or the other does not work

The idea of seeking external funding for a grant on managerial best practices

Co-responsibility and collaboration

Purpose and clarity of roles is helpful

Knowing where we want to end up in a few years is key

A diocesan synod can help demonstrate to laity that they can no longer be passive bystanders

“Love them back to God.” When people come to the Church looking for something, build on it. Don’t shut the door.

Use the breakdown of a situation as an opportunity to understand root cause. Don’t just put a bandage on it.

## Themes from Table Discussion Question #2

### What strategies have you implemented for bringing about culture change in your organization?

Employee evaluation that involves staff writing vision paper of what they want to do in coming year

Grievance procedures

Moving from a conscription-based organization (people feel they must attend church) to a volunteer based organization (people not feeling they must attend) means finding different ways of training leaders

After a parish merger in Michigan, pastoral council was created with the mission of thinking about the big picture and asking the important questions about where the parish should go.

Parish survey made people feel heard

Use of Catholic Leadership 360 for clergy, and lay leaders

Keep centered on mission

## Themes from Table Discussion Question #3

### What resources would help you bring about institutional change in your parish or diocese?

Guides on communications, compliance evaluation, key performance indicators, volunteer management and managing transitions

Assistance coordinating diocesan activity (various departments are competing for constituents' time)

More grant opportunities for parishes

Interactions with seminaries to encourage more education around financial management

A template for a parish financial report and strategic plan





2016 ANNUAL MEETING

*The Francis Effect and Changing Church Culture:  
Advancing Best Managerial and Leadership Practices*

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## Our Growing Edges: Looking to the Future

**Dominic Perri**, Principal, Essential Conversations Group

**Megan O'Neil**, MBA/MA Candidate, Boston College

**Rev. Larry Snyder**, Vice President for Mission, University of St. Thomas



Dominic Perri

**DOMINIC PERRI:** For the last 4 years I've been the Program Manager for the Roundtable's Catholic Leadership 360 program. I've also, for the last 15 years, been the Principal for a small consulting group called the Essential Conversations Group. I've worked in about 30 dioceses and about a dozen men's religious communities, and part of what I hope to bring, along with our distinguished panel

here, is a little bit of insight as we look towards reading the signs of the times and engage you in a conversation about what might be possible as we think about the future, the trends that are emerging, and the role that the Roundtable can play in that.

I'm joined by Megan O'Neil, who is an MBA and MA student at Boston College, as well as Fr. Larry Snyder, who is the former head of Catholic Charities USA and is now at the University of St. Thomas in Minneapolis.

We think about reading the signs of the times in what's emerging, and a number of these topics and themes have already come out in different ways. Hopefully we'll see in this conversation now an opportunity for some convergence in our conversations.

The first thing that I notice, as I work in the Church around the U.S., is that we

are finally moving into the post-scandal era. It has been more than 10 years since the initial story broke in Boston. For that ensuing decade, so much of what diocesan leadership and episcopal leadership had to be focused on was the handling of lawsuits and the very difficult financial conversations that had to be had.

We are now at a point where we're beginning to see that the scandal is no longer front and center for many diocesan leaders. They've got the opportunity to begin to think and focus and look forward, and I think the election of Pope Francis has only fueled that. It's interesting to me that Francis was elected almost 10 years from the time that the first story in Boston broke, and I think he's brought this kind of energy and dynamism to our Church globally, and I pick that up nationally as well. I'm noticing that the energy that Francis is bringing and sparking is bringing forward conversations that were dormant or perhaps much lower profile, and now are able to come up.

The challenge, though, that I see from my perspective, is that we still have a number of great challenges as a Church, and what I'm hopeful but also cautious about is that we move from maintenance to mission. With the number of challenges that we have we could simply shift into a maintenance mode, and to some extent I think at times we've been in that. How do we move to a missional mode? How do we really declare where it is that we want to go forward, now that we have this opportunity of getting our head above the challenges of the last 10 years, with a dynamic Pope who is calling us to so much more?

I want to pick up on that idea of moving from maintenance to mission, and what I see, in a number of places that's very encouraging to me, is how much more proactive planning is happening with each succeeding year. Dioceses, for a number of years, have been doing a variety of different forms of pastoral and strategic planning. I've become very encouraged by seeing how much it's happening with parishes and schools, so much so that I can think of several Catholic school systems, one in particular, where the superintendent has said, "Every school in this diocese will have not only a strategic plan but a marketing plan to go with it," because the viability of those schools, as you know, is at stake. This is the Diocese of Joliet, outside of Chicago. He then followed it up by saying, "And if anyone doesn't know how to do one, I'll supply a consultant to you who can help you do it," and identified a group of talented lay people from within the diocese to help make that happen. So the movement from maintenance to mission, to looking forward to planning—that's hopeful.

Another piece that I think is very helpful is the relatively new emergence of

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leadership programs in our Church. A few years ago, at one of these Leadership Roundtable sessions, Carol Fowler from the Archdiocese of Chicago and I did a session on leadership programs in the Church. In preparation, Carol and I simply listed the various leadership programs that were available to people in parishes and at the diocesan level in our Church. We were hard-pressed to name anything that went back before the year 2000. Pretty much everything that exists, from our Catholic Leadership 360 program to the Catholic Leadership Institute, to the Villanova University Church management program and so forth—none of it goes back before about the year 2000. It came on the Church's radar, it seems, maybe in the late '90s, but certainly in the last 15 years or so. That's a very hopeful sign, and it's a recognition of how important leadership is.

I'll give you a quick anecdote. Around the year 2000, one of my first consulting projects was in a major archdiocese in the U.S., where they had surveyed all the priests of the archdiocese and asked them, "Name who you think the ten best pastors in our diocese are." They took the ten names that came up the most frequently, and I sat down with each of them, for 90 minutes. I had a full script, and the idea was I was going to find out what the recipe for a great pastor was. I was going to ask them everything from when they discerned their vocation to what seminary they went to, to where their first parish was, who was their first

pastor, did they do ongoing formation, did they take their day off, did they have priest friends, lay friends, etc.

By the time I got to the sixth or seventh interview, I was very depressed, because I had to write a report and there was nothing in common about these guys. Some of them hadn't cracked a book since they walked out the door of the seminary and some of them read all the time. Some of them didn't take a day off—they seemed to be quasi-workaholics—and others were religious about it. I couldn't figure it out.

And then what I figured out—finally, as I reflected and prayed desperately—is there was one thing that was in common for them. Does anybody know? They each knew who they were. They knew what their particular gifts were. And they had, on their own, built their pastorates and their priesthoods based on the gifts that they'd been given. One guy said, "I am not a good preacher. I know I'm not a good preacher." He said, "I do my preparation but when I get up on Sunday morning I have a 5-minute message and I sit down. That's not where my gifts are. My gifts are in one-to-one." He actually turned out to be one of the best fundraisers in the archdiocese, so much so that they elevated him up to the diocesan office of development.

Another guy said, "I'm a massive introvert. I go to the rectory from 4 to 6, I close the door—if I don't get 2 hours alone, by

myself, in the rectory, I'm no good when those evening meetings come along."

I say this to make the point that, in those years around 2000, if you were going to be an effective leader in the Church, and certainly a priest, for the most part, you were on your own to figure it out. God bless those guys who did, but a lot of other guys probably struggled a little bit more. We now have a number of programs that help our priests and lay leaders in our Church to begin to think about what good leadership looks like and how they take the gifts that they've got and apply them.

I'm happy to hear several people today mention our Catholic Leadership 360 program. A big component of the program is helping priests and lay leaders understand themselves as others see them, understand their gifts, and leverage their gifts into leadership competencies. In terms of signs of the times, it is a very hopeful trend that we begin to become much more intentional, both about our planning and developing our leaders and I think it's a trend that Leadership Roundtable has a lot of good things to say about.

At the diocesan level, and also the parish level, we are seeing a professionalization of the people who are in those roles. I would identify a couple of waves, I might say. One of the things we were talking about at our tables is if you went to the average parish in the United States in the 1950s, what you would likely find was a big, diverse Church—so you can't say everywhere—but what you would have likely found was three priests and a secretary and a group of religious women running the school.

Then what began to happen in the '60s and '70s and so forth is we began to

hire lay people, and the first wave of lay people who were hired were deeply dedicated, very well-intentioned, but not always trained for the roles that they got hired into. What we've now seen happen, and I've noticed in the last 10 years, at the diocesan level and the parish level, is we're beginning to get people who are credentialed, certified for the roles that we're asking them to take on, whether it be at a diocesan level, as CFO, head of HR, running the Department of Evangelization, or similarly at the parish level. That's a huge step forward in our Church.

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The next step, though, is helping those folks not only be experts in their own content but also to be able to be effective leaders. That means breaking through silos. That means learning how to be proactive. That means learning how to work through what is, at times, a Church bureaucracy that we're all too familiar with. I think that's a trend that we're moving in, and another great place Leadership Roundtable can be helpful in. Another wonderful thing is how we see a lot of second-career professionals coming to work in the Church. Folks who are 50, 55, 60, had successful corporate careers, who want to serve the Church, and are bringing that expertise. That's a lot of what this organization is about. There's an opportunity to think about how we help

these people understand Church culture, because what they all tell you is, "This is a very different animal than the one I came from," and the way that decisions get made, the speed at which things are expected, the level of resources that are available, and a number of other things are just very different. And, more than I care to see, what happens is some of those folks end up walking away in frustration. They say, "I wanted to help. I just couldn't figure out how to do it." I think that happens an awful lot at the parish volunteer level, and we're losing some great talent as a result. There's an opportunity there and I think that's something for us to look at.

There's also a great need for what I would call a theology of management, that we help people see that all this isn't add-on stuff. This is part and parcel of building a 21st century Church. It's simply good stewardship of our resources. Often I have the privilege of leading and facilitating convocations of priests in over 20 dioceses in the United States. One of the laugh lines that I almost always get is this. I will say to the priests in the room—100 to 150 of them—"Raise your hand if you went into the seminary because you wanted to be an administrator. Raise your hand if you went into the seminary because you wanted to manage people." This is not why they become priests. It can feel like a secular add-on. To them, management is the thing they've got to do to do the thing that they really want to do. We have to help priests, and all the folks who are in leadership in our Church, to see this is deeply woven and integrated into the life of what it means to lead a community of faith that is going to be self-sustaining and around for a long time, and that can have the kind of impact that Danny Casey talked about from the Vatican.

One last trend, and I think it's a very hopeful one that I would point to, is we're seeing a rise of what I would call entrepreneurial Catholicism; just take, for example, the area of parish life. In the last no more than 5 years, we've seen the rise in the parish world of three particular groups, two fueled by the writing of books, that are now growing movements in parish life. The first came out of a parish outside of Baltimore. How many are familiar with the book, *Rebuilt* about the parish in Timonium, Maryland? That has now been leveraged into an annual conference that gets hundreds of attendees from around the country, of people coming to learn how this place became this vibrant parish. They've built an online association of parishes that are plugged in, and they're having regular webinars and sharing resources and so forth.

Two weeks ago, I was in Halifax, Nova Scotia, for the first Divine Renovation Conference, led by a Scottish priest who lives in Canada now, Fr. James Mallon, who wrote a book called *Divine Renovation: Moving Your Parish From Maintenance to Mission*. Let me tell you. Halifax, Nova Scotia is not easy to get to, and 500 people went up to Halifax to have this experience and Fr. Mallon has built a Divine Renovation Network to keep parishes plugged in.

And the third is The Amazing Parish movement, which has had four conferences in the last year and a half,

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*Accountability and feedback give you the opportunity to know how well you're really serving.*

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and I think over 500 parishes and close to 2,000 people have participated in those. In each of these cases, people are not waiting for an episcopal blessing or a sign from leadership. They're just going off and meeting a need that they see, and with the tools of the Internet they're able to very quickly connect and organize and bring people together.

One of the questions for Leadership Roundtable and all of us in the room is, how do we support that? How do we encourage that? These are a set of very powerful tools, when you've got the ability to connect people by video, e-mail, webinars, and all the other ways that the Internet allows for.

I think there are also a few challenges that we are well suited to address, as we think about going forward. All of these are things that Church culture pushes back against, and we have the ability to present an argument for.

The first is metrics. The common response I get from people is that metrics feel impersonal, but I think metrics are about good stewardship.

The second is accountability. In Church culture it's an uncomfortable concept. The priests that we work with in Catholic Leadership 360 often say, "This is the first experience I've had of anybody giving me feedback on anything since seminary." Well, at the same time, accountability and feedback give you the opportunity to know how well you're really serving. We can advance that argument.

The third is technology. There is sometimes a feeling in the Church world that our business is about person-to-person, sitting in front of the person, eye-to-eye. That's wonderful. But if you

look again at what Fr. Mallon has done in Canada, and what the folks in Timonium, Maryland, have done, and so forth, you'll see that if you use technology effectively you can start building virtual communities of people across the country.



**MEGAN O'NEIL:** As Dominic mentioned, I am a graduate student at Boston College. I'm getting a master's in theology and an MBA. It's a real degree program that does exist, although it is not very popular. I think I'm the third person to ever do it! So if you know of any aspiring Leadership Roundtable staff members, that might be a good degree for them to get. I was involved in ESTEEM when I was at Stanford as an undergraduate, so since then I've followed all the work that the Roundtable has done and I'm really honored to be here.

It's hard to look at the future of the Church and talk about it without talking about young people, so I have the honor and daunting responsibility of representing the elusive millennials. I won't pretend to be a voice for all of my peers but I will share with you some of the observations I have, and I'll leave you with a challenge that I

would like to empower all of you to engage in, in a way that I will explain.

A question that you might often get is, how do we get young people to Church? How do we engage with young people? And the real answer is there's not a one-size-fits-all answer. I've thought a lot about this. I've had a lot of great conversations with my family members, some of whom are church-going and some of whom are not, a lot of conversations with my peers at Boston College. Of course, in ESTEEM, I encountered this challenge—how do we get young people to come back? And I think there are a lot of different strategies, but there is no one-size-fits-all. So that leaves us with a blank slate, which can be exciting because it means that there's a lot of room and a lot of opportunity for growth.

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***It's hard to look at the future of the Church and talk about it without talking about young people.***

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In a similar vein, there are two key assumptions or conversations that happen around young people, and I'd like to challenge those both right now. The first is the assumption that young people aren't involved in the Church, and I think that's a false assumption. If you think young people don't go to Mass, I could probably say, sure, that's a pretty fair assessment. But if you look at people my age, they're involved in things like Jesuit Volunteer Corps, and ESTEEM, and you can see the engagement with Pope Francis on Twitter, and I think that all of those are really true engagements with the Church. They're just not maybe where you're looking for the young people to be.

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***We're all cooperative in the Church and it's a co-ownership. It's clergy and lay. It's old and young. Men and women. We all have to be responsible.***

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What that can tell us is the importance of meeting people where they are. Asking why is it that the young people—I keep saying “young people”—but why is it that a big portion of the Catholic Church, of the Christian population, is not going to services over the weekend, but is still living out their Christian faith in other ways. I think that tells you there's really a desire and there is the fire of the Spirit living in this population, and we need to bridge that gap between the Eucharist and other avenues for experiencing that.

The second thing that I'd like to challenge is that often times you think about the future of the Church and you say, well, the millennials or the young people or the next generation is going to come in and take over the Church, so we have to prepare it for them, we have to make that a smooth transition. I think that that is the wrong way to look at it. It creates an “us versus them” mentality, and it creates a gap that's not there, obviously because generations don't go in clear gaps. It's a continuum.

I also think that it creates the idea that there's kind of an ownership, and I think that's the wrong way to look at it, because we're all cooperative in the Church and it's a co-ownership. We've talked about it. It's clergy and lay. It's old and young. Men and women. We all have to be responsible. Part of the way that I would encourage us to close that gap is by creating a culture in the Church of inclusion and welcome, and I'd like to highlight three example of parishes that I visited that have really vibrant young adult populations, and share

with you some of the things that they do that I think are really successful. They're really simple, and they can be replicated. The first is the Paulist Center in Boston where they have a really vibrant young adult population. They have potlucks that have hundreds of people every month. I went one time with my roommate and I was really amazed because it's a small space but after Mass, after we had all received communion, the priest invited anyone for whom this was their first time at the Church to stand up and introduce themselves, if they'd like, in front of the whole parish. Can you imagine what message that sends? It's showing that you're welcome, and we want you here, and we want to know you. Not only do we want you to come but we want to invite you to continue coming. So I introduced myself, and after everyone had introduced and we sang the recessional hymn, I think at least three people came over and individually introduced themselves to me as well. Imagine someone my age.

A lot of people have had challenges, have had disagreements with the Church, and it takes a lot to go back to church if you don't know anyone. And you have one scenario where you show up and the same people have been sitting in the same pews for years, and people might smile and introduce themselves but it can be impersonal. But there's also another scenario, one where you introduce yourself, people come up to you, invite you to the potluck or whatever it is. Now which one of those are you going to go back to the next week? For me, it's

definitely the one where I feel welcomed and known, and that if I don't show up people will notice.

The second example is Resurrection Parish in Aptos, California. I don't know if any of you have been there, but it is a wonderful parish, and something that they do before every single service—or every one I've been to, at least—the priest and the deacon get up and they have the same script that they sing every single Mass, and it goes something like, “Are you married? Are you single? Are you gay? Are you straight? Well, you belong with us.” And the entire parish then sings a chorus of “You belong with us.” That really sends a message. It sends a message to the parish that the parish is singing those words, and encouraging that sense of inclusion and belonging, and it sends that message to newcomers, that wherever they're at, they're welcome there. Again, that goes a long way with people my age, and people of any generation really, but for someone for whom going to Mass is a challenge, that message goes a long way.

The third example is St. Cecilia's parish in Boston, where, particularly during the young adult Mass on Sunday nights, the pews are always full and it's the kind of Mass that you go to because you want to go to Mass. The priest, every week, gives a homily that is probably 30 to 45 minutes. So the Mass every week is routinely an hour and a half long, and there are young people who choose to spend their Sunday nights, they commute in from all parts

of Boston, to go to a longer Mass than normal.

Now what's going on there? I think the key there is that the message that the priest gives every week is intellectual, it's really well-founded, it engages them, it talks to the young people there as if they're there to learn. It's really theological and I think it demonstrates that people are craving to be challenged, or they're craving to know more, they're craving knowledge, they're craving opportunity, they're curious. And this kind of Mass, with this extended homily, is satiating that curiosity. I'm not saying that every Mass should be an hour and a half, and every homily should be 45 minutes, but this particular priest has a gift for producing really challenging and intellectual homilies that has been successful.

Now I challenge you to think about where millennials are. For instance, I'm in my mid 20s and I've lived through three Popes, and lived through the scandals. I've grown up transitioning from a non-technological world to a really high-tech one. We are trained to be skeptical, because of a lot of the things that have gone on in the time that we've grown up. And I think that skepticism is something to be aware of when engaging millennials, because it means that there's going to need to be that invitation for us to engage, and that there's going to need to be a reaching out rather than a passive waiting.

For myself—and I think that I can speak for a lot of my peers—I would love to

be invited. I would love to be engaged. I challenge you to think about if there are young people in your parishes that could be invited to participate in pastoral and finance councils. Because if, in fact, we are going to be transitioning to the next leaders of the Church, we need to learn what it is that we're going to be leading, and we need to learn what it means to be a really dynamic member of the parish. There are simple ways to do that and I think it starts with the invitation and the opportunity to be included.

**FR. LARRY SNYDER:** I don't know about you but I'm feeling a little ancient. Megan says she's lived through three Popes. I think I'm on my seventh, so I have had a little more time here. I know we're addressing the future and trying to figure out what are some very positive and hopeful things that are happening, but I have to begin by saying that I make no claim to be able to see into the future. But I think there are trends we can identify that can give us some insight about positive things ahead.

I'd like to approach the Francis effect through the lens of organizational change. When Francis was elected, it was very clear that he was tasked with being an agent of change. But what kind of change was he tasked with? I would say that if we look at it, it's kind of the “back to the future” change, because if you look at everything Francis does, it's like he's taking the foundational Gospel principles and making them come alive again, in a new way. He has gone back to the foundation and once again made it very much alive.

Like John Paul II and Benedict XVI, Francis is trying to affirm the mission of the Church. But they frequently defined it in opposition to the world, whereas Francis, I think, is very much a proponent

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Fr. Larry Snyder

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of engagement with the world and especially through dialogue with the world. If we think of him as being an agent of change, many of the challenges he faces were the same challenges that a new CEO would have.

Organizational change has many components, some of which would be an evaluation of the structure that you have; an evaluation of the process systems that you use; a definition of skills, both organizational skills that are required and individual skills; a definition of shared values, which will pull us together as we work together; and then, finally, modeling preferred behavior. All of those things are part of culture change when you're doing change management.

I want to make a few comments that focus on Francis' values and style. If I asked each of you to write down three

themes that you see over and over again in Francis' teachings, my guess is we'd all come up with maybe three different themes, but there would be a lot of convergence, a lot of congruity.

These are the three that speak to me.

The first is inclusion. I know that you hear frequently that Francis focuses on poverty, and he certainly does. That's a huge issue for him, and he talks about being a poor Church, for the poor. But that's one piece of what concerns him. It's actually much more. His concern is whoever is being excluded, whoever is being forgotten. It's just like Jesus reaching out in the Gospels to the people who were always standing at the edges, at the fringes. To me, Francis is always looking to see who we are leaving out.

The second is mercy, which especially in this Holy Year of Mercy has given

us all a lot to think about. An important distinction is that mercy is not the same as compassion because mercy goes beyond compassion. Compassion tends to be a feeling or an empathetic response to a situation whereas mercy has to entail action. It goes beyond just a feeling to action that mitigates suffering. For example, over and over again, when Francis looks at the plight of migrants, he's saying we can't just be concerned and feel bad. We have to respond and mitigate the suffering of these people.

And the third is accompaniment, a word that is a real challenge to us. Accompaniment challenges us to go beyond judging others, to an acceptance of them and giving them the respect that they are due. That entails walking with them on their journey, and sometimes even asking their forgiveness, which, of course, has gotten Francis in a few pots of hot water.

When we look at the future, it's clear that Pope Francis is reshaping the papacy as we have known it, but it's also like he then turns and looks at us and says, "What are you waiting for?" We all have parts of the Church that we need to reshape as well. When we think of those three themes that I talked about and their impact on organizational structure and life, I think some of the things that need to be done are just simply normative. For example, the model of leadership that we have here should be servant leadership, and he certainly has talked time and time again against clericalism that he sees in the Church, that it should have no place there. He also talks about transparency and accountability, but through engagement.

Again, something that impresses me is that he is especially concerned about the role of women in the Church, and that he

affirms their value and the role that they should have.

So what does all that have to say to our parishes and our organizations? Well, again I'm going to go back to the fact that I think he's calling us to go back to the future. First of all, in the sense of our beginnings in this country, to the first century and a half of the Catholic Church in America. At that time, we were a Church of the poor because we were primarily an immigrant Church, and we experienced real religious discrimination. How did we survive? Well, parishes and the organizations that we established to respond to the plight of immigrants, such as education, health care, social services, all of those things, but especially the parish on which the other three are built, became lifelines for people, that gave them the skills that they needed to assimilate to this new life.

As we look to the future, I think there is a difference between what happened then, because at that time the style was very much parochial, but those were the times. Catholics took care of Catholics, just like

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the Lutherans took care of Lutherans. It's why we have so many different faith-based organizations in this country. As we look at the future, I think it can no longer be parochial. It has to be interfaith. We have to work with other people of good faith and other people, perhaps, of no faith. The challenge for us should be not how are Catholics faring, which was a major concern back then, but simply how are the poor faring, how are those who have been excluded faring, are we standing with them, because that, for Francis, is a huge part of the mission of the Church.

A very visual example for me is that down the road from the University of St. Thomas is our sister school of St. Catherine, and about 100 years ago, there were a lot of people running around with black veils, and they were the Sisters of St. Joseph.

Well, today if you go there there's a lot of people running around with black veils, but it's not the Sisters of St. Joseph. It is rather the Muslim women who are being educated there. So it shows how the mission of the Church, the mission of St. Catherine's has changed over time.

We talked about the plight of Catholic schools in the inner city. Many of them have been closed because many Catholics moved to the suburbs and were no longer there, so it became not a very viable thing for dioceses to do. But this has given rise to other entities like Cristo Rey schools, and I know there are many more, who are taking up the mission because it's still a valid mission for us. So, again, they don't have a new mission. They went back to the future. The mission may be lived out differently but it's the same mission.



Fr. Larry Snyder, Megan O'Neil and Dominic Perri

The second thing that we really need to do is to go back and reread the documents of Vatican II, because they have been so formative for Pope Francis. We need to go back to the reform and, once again, be enlivened by it. I think if we do those two things they could really help shape our future.

An interesting exercise would be to do a SWOT analysis of the Catholic Church, and I'm not going to do that, except to make a comment about if we looked at opportunities, I think we could come up with a ton of opportunities, and to look at the incredible positive force that Pope Francis has been. But I would like to focus on one threat, if we were doing a SWOT analysis, and it's what I would call the tyranny of bureaucracy, and maybe I'm just sensitive to this from having spent 10 years in Washington, D.C. There, you get politicians who come in and they're so excited. They get elected and they're going to change the world, and sometimes they're even able to pass legislation, but things don't change all that much. Why? Who is entrusted with actually implementing these new laws? Well, the bureaucrats who are there, and sometimes they agree, sometimes they don't, but they have the power to really embrace or not to embrace the legislation.

The Church is a bureaucracy. We actually took our structure from the Roman Empire, so it's just natural that we should be. As we look at that bureaucracy I'm wondering, are the generals and the foot soldiers of the Church behind Pope Francis? There are those who sometimes doubt that. For example, in the press we saw concern that in the few meetings that the U.S. bishops had, when you compare their agenda with the speeches and teachings of Pope Francis, the conclusion was, "There seems to be a disconnect

here." Now, I will say that more recently you've seen much more coming out of the Bishops' Conference on immigration reform and gun control, things that I think are moving them closer. But I think we have to be careful. Is there a tyranny of bureaucracy in the Church? Actually, having said that, I have to say I'm very hopeful, because these things take time. These things take time, and I think that Pope Francis is inspiring a renewal of leadership in the Church.

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Just an anecdote here. There was an archbishop in my home archdiocese of St. Paul and Minneapolis named Archbishop John Ireland, who was a visionary man who did a lot of amazing things. But he was asked by the Bishops' Conference at the time to talk about the future of the Church, and this was back around 1900. He waxed eloquently and went on and on, as was the style at the time. But at the end he said, "But there is only one thing we need to know, and that is, as we will it, so shall the future be."

I'm very encouraged by this gathering of people because it shows we do have a will, and that's what I want to end with, to salute Leadership Roundtable for the things that you are doing, that you have developed, that you continue to do, because I think you definitely fall in that space that Jim Dubik talked about today, the space between the "is" and the "ought." You are moving us towards the "ought."

With that, thank you for the opportunity to make a few comments today, but also, just to say I'm very hopeful for this organization and the impact you're having in the Church.

# Participant Comments

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**JIM LUNDHOLM-EADES:** One of the things to emerge at our table, as both a trend and a source of hope, is the Hispanic Catholic Church. We talked about the engagement there, how the Church needs to adapt the way it has traditionally been to this relatively new immigrant population. We've always been an immigrant Church. Here's a relatively new immigrant Church, in some ways, at least, that we need to continue to see as a source of hope and welcome and include.

**FR. JOHN HURLEY:** I want to lift up Megan's comments, which were not only about the Paulist Center in Boston, (as a Paulist myself!) but I think the whole sense of engaging the young Church in leadership roles, and for the rest of us to stop talking about "them." As I work with parishes around the country I think the key thing is that the young Church needs to be on the pastoral councils if we're going to even begin to start thinking differently. Otherwise, we're not even going back to the future. We're talking about science fiction if we're trying to figure out what somebody else's mindset might be. And I think that's getting out of the box, and I think that's a powerful dimension on the leadership issue.

The other trend that I've seen, and also one that Megan addressed, is the Sunday night experience. This has become almost a ritualized way for young families and young adults to wind down the weekend.

There's no mass exodus after communion, as there is in most churches at other Mass times, and I think we need to be attuned to that. Sunday night Masses are no longer like they were in the '70s, the "last Mass in town" attitude. They're a powerful opportunity where young families come together, we have a lot of youth programs beginning to happen, and our young adults engage and come together and network and very often go out and get something to eat afterwards, which offers parishes a lot of creative opportunities.

**DOMINIC PERRI:** I'll build one thing very quickly on young folks, and this goes back to something I meant to say when I talked about entrepreneurial Catholicism. I'm seeing lots of folks in their 20s and 30s who are very entrepreneurial and they are deeply dedicated Catholics who are doing everything from web design to sound production to music to blogging and so forth, and absent the institutional Church giving them a platform, they're just creating it, and they're going out there and they're building contracts with parishes and dioceses and so forth. These are very creative, innovative people who are kind of

finding their way and they're doing a nice job of it, as young entrepreneurs, but for those of us who kind of sit from this post to say, "what could we do to be calling them forth?", encouraging them, helping them to see that their gifts are very wanted and needed in our Church, I think, is another potential option for us.

**MAUREEN GALLAGHER:** Another trend that we talked about was the trend to collaboration to create greater partnerships, both within the Church and with people not in the Church. We talked about dealing with drugs and dealing with schools, et cetera, that there's lots of ways to collaborate, and that silos are no longer in fashion but collaborative partnerships are. Another opportunity would be given the political scene that we have right now, particularly in terms of the presidential race, there are a lot of opportunities to do education in terms of social justice. Another collaborative opportunity might be working on ecology, again, certainly the Pope has spoken out on it, but we can get groups of people that aren't Catholic to keep on working on saving the planet.



Fr. John Hurley

**MEGAN O'NEIL:** I think that addresses a lot of what I see, which is that people my age are engaging in unique ways in their collaborations. I think that some of the things you mentioned would be really wonderful ways to bring in the younger generations as well, especially around political advocacy and social justice. That is a really important piece.

**DOMINIC PERRI:** Did anyone talk about potential partnerships and places people could partner with the Roundtable?

**PETER PERSUITTI:** One idea that I've been working with is the Young Catholic Professionals. This is led by an MBA student, Jennifer Baugh, who is based out of Dallas. She did a case study on this gap of college graduates aged 21 to 40, who leave their campuses, and end up in the urban centers. The organization has 13 chapters, and it's a very exciting group. I think that it is a great model to help the Church get that age group.

**FR. BOB BELOIN:** I wonder if we can use the media in dioceses to highlight success stories. Years ago, when we finished RENEW in the Archdiocese of Hartford, a group of us went to the archbishop and asked him to establish a full-time office for Small Christian Communities, and he said he would but he said, "Show me model parishes." I wonder if there are model parishes within dioceses, or model dioceses within the country, that could be using the Catholic Standards For Excellence, for example, that we could write up in the diocesan newspaper and tell these success stories.

**KATIE MCKENNA:** We talked about the importance of partnerships. For instance, it is a special experience to be at this meeting together and that we

share these hopes that we will be able to move forward, that these managerial best practices are something that we want to instill in our dioceses and within our parishes. We want to be successful, and the best way for us to do that is to do it together.

**KERRY ROBINSON:** Dominic, it's a real pleasure for my colleagues and me at Leadership Roundtable to include you on our team, running Catholic Leadership 360. Fr. Snyder, your 10 years as president of Catholic Charities USA. Consistently, Catholic Charities USA was singled out as a model of financial transparency and best managerial practices. It's been an honor to have you be part of the creation of Leadership Roundtable. And Megan, you are a reason for my hope, most definitely—a young, brilliant Catholic woman who despite all odds, is tenacious and gracious about putting yourself forward and making sure that you have qualifications and the pedigree and you will not give up until you are running the Church.

Thank you all. All the panelists today were fabulous. All of you, the participants. Every single one of the participants could be a keynote in your own right. I am deeply grateful for the level of engagement and discussion, both in plenary session and at the tables.

Please visit our brand new website, [leadershiproundtable.org](http://leadershiproundtable.org), which was just unveiled. You will find many more resources about the programs and services of Leadership Roundtable. You can continue this discussion online by joining [CatholicStandardsForum.org](http://CatholicStandardsForum.org). Please take the encouragement and the hopefulness, the ideas, and the synergies that you experienced here and become ambassadors of Leadership Roundtable's



mission. And please be on record, if you are not already, as a donor, supporting this important work, and encourage anyone you know who believes in this mission to likewise contribute and be on record.

I want to thank Faith Direct and the Connelly Foundation for their support of this particular gathering, and especially thank the event planning staff, my extraordinary colleagues on staff at Leadership Roundtable, my colleagues on Leadership Roundtable board, and all of you for being here.

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# Table Discussion

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## Themes from Table Discussion Question #1

**From this session and the day's conversations, what are the major trends you identify that we face in the Church that will impact the mission of leadership and managerial excellence?**

Need for feedback system for bishops, pastors and priests

Human resource development, in broadest sense, continues to be an area of question and need for education and focus

Difference between old and young priests in utilizing lay people

How to structure pastoral and finance councils most effectively

Multi-parish pastoring

Trends of transparency and openness

Multicultural environment

Societal questions of race, immigration, poverty, etc.

Growing sense of "ownership" of the Church by laity

Secularism may be a spent force; there is a search for meaning that transcends secularism. This means there is an increased need for marketing and advertising.

Parishioners are demanding improved accountability and transparency and in a lot of places parishes are rising to the challenge

Increased accountability for the management of sex abuse in the Church. Can't get into the mindset of "it's all behind us now." What's behind us still matters.

The importance of a theology of management

Understanding that leaders in other cultural backgrounds are identified and raised up in ways that are different from the Anglo culture

Chanceries are often bastions of Eurocentric thought

Naming the "culture of mediocrity" that exists in our workplaces because of lack of training in performance reviews and a lack of incentives for workers who excel

Decline in number of sacraments administered is strong trend

Developing Latino ways of ministry, not merely translating Anglo ministry into Latino words

We no longer have much time to apprentice new priests before they become pastors; not all priests can be good pastors

Is seminary selection and formation doing its job to identify future successful candidates?

Trend of "church shopping" may be fueled by consumerism and sense of entitlement. Also losing people to evangelical communities.

Can't form people with such a rigid ideology that can't accommodate their lives

Consequences to poor evangelization

Need to put more energy into formation of people in the pews. Problem isn't that the message isn't true; it's that it isn't attractive.

## Themes from Table Discussion Question #2

### **What are the major reasons for hope that cultural transformation will happen in our practices?**

Issues we now face are too complex for any one sector to address. Church has an important role to play to partner with other sectors to address these challenges. These are win-win opportunities.

Example of partnership: eg Jubilee Schools in Memphis

Pope Francis' encyclical, Laudato Si, provides opportunity for collaboration on the environment

Increased enrollment in Catholic schools in many places

Pope Francis

The second careers of the people from the business world, who are bringing business practices into the Church

They are not walking away; they are trying to push from the bottom up

Seeing people who are "at the top" willing to stick their necks out and be embarrassed, and say that there are things they don't know, or that they are willing to be assessed

Bishops supporting communities that have traditionally been excluded

Grassroots movements responding to Francis' message who is saying the message of the Church but in a different way

Younger bishops

Growth of Hispanic population and leaders from other cultures, including young Catholics

We're doing a better job of including and mentoring international priests

Young people are developing a relationship with Christ in more personal, albeit unfortunately less institutional, ways

Shift from autocratic leadership to servant leadership

Foundations (like Lilly Endowment) are showing innovative, creative ways of catalyzing cultural change

Emerging models of pastoral leadership are challenging. Not always an improvement (eg, one pastor, four parishes) but creativity is a good sign.

We're increasingly aware of deep pockets of pain. Change is most often experienced as a loss. But Leadership Roundtable is helping with messaging, change management, conveying hope.

## Themes from Table Discussion Question #3

### **What ways might you partner with Leadership Roundtable to advance the movement of best managerial practices in the Church?**

Is it time for Leadership Roundtable to do more promotion of examples rather than keep teaching?

Leadership Roundtable needs to tell their story in writing and in digital media and help us explore our own media strategies

Leadership Roundtable agenda is now in a context that lacks urgency like it did 10 years ago, yet a crisis clearly looms

There is an important role for Leadership Roundtable to support Roundtable-like organizations in other countries

Do more to disseminate best practices to various parishes and dioceses

Increase formal partnership opportunities - attending meetings, sharing resources, broad-based conversation, including personnel from the Church in the conversation

Help pastors in outreach ministries

How to really instill accountability at every level in the Church?



2016 ANNUAL MEETING

*The Francis Effect and Changing Church Culture:  
Advancing Best Managerial and Leadership Practices*

June 29-30, 2016

Inn at Penn,  
Philadelphia, PA

[leadershiproundtable.org](http://leadershiproundtable.org)

## Best Practices Award

**Kerry Robinson**, Executive Director, Leadership Roundtable

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

**Thomas Healey**, Partner, Healey Development LLC

**Rev. Paul Holmes**, Distinguished University Professor of Servant Leadership, Seton Hall University

**Michael Brough**, Director of Strategic Engagement, Leadership Roundtable

**KERRY ROBINSON:** We honor two individuals who have contributed in extraordinary ways to Leadership Roundtable and offered the Church an invaluable, effective resource, the Toolbox for Pastoral Management. It's particularly moving to me to be able to honor Fr. Paul Holmes and Tom Healey, two of my heroes. After we present the awards, we will have a discussion with Tom and with Fr. Paul, moderated by Michael Brough, who is responsible for so much that is going well at Leadership Roundtable, and his leadership on the staff daily ensures that we model what we advocate.

First, a story about the Toolbox. When Leadership Roundtable was first created in that sea of distrust and urgency in the Church in the aftermath of the sexual abuse crisis, one of the first things that we realized was that today you can be ordained a priest, and unlike your predecessors a generation ago, have maybe 18 months before you are

given a parish or two parishes or three parishes, maybe two of them have schools, and suddenly 18 months after being ordained, you are effectively a CEO of a very complex structure of people and facilities and finances. That would seem fine, except in seminary, you were never given even one course in basic management or finance. What we saw was enormous anxiety setting in for our

beloved new pastors. We went to the seminary rectors shortly after we were formed as a Roundtable, and with data laid at their feet, identified this train wreck that we saw coming, and they said, there's just no room, there's no room for anything to be added to seminary curriculum. What I love about Leadership Roundtable is we did not let that rejection, that "no," deter us from doing what was essential,



Thomas Healey and Fr. Paul Holmes



Best Practices Awardee Fr. Paul Holmes with Kerry Robinson and James Dubik

faithful, urgent, and important. We were respectful of the “no”—we didn’t argue with them, we didn’t throw a fit, we weren’t rude, we weren’t chastising—we simply figured out another way to attend to this very important and urgent matter, and that is where Tom Healey and Fr. Paul Holmes came together and created a solution. Perhaps it was to be a temporary solution, but it was a solution that was absolutely necessary, and that was the Toolbox for Pastoral Management.

The Toolbox wasn’t going to give seminarians years of training at the seminary level in finance management and human resources, but it was going to give them six days of an intensive retreat in a very prayerful setting, and while there, they would get a crash course in the basic vocabulary and the elements necessary for any leader of any complex organization, and it would be rendered with incredible care and faith and fidelity and love for our pastors.

I’m going to first honor my friend and colleague Fr. Paul Holmes. What is the best way to describe Fr. Paul? It is simply as the quintessential priest and the very best rendering of that. Fr. Paul loves the priesthood. He is so joyful about the priesthood. He loves the intellectual Catholic life. He loves the pastoral ministry. He loves his brother priests. He is an exquisite homilist, an exquisite teacher, an exquisite healer, and exemplary leader. He is quite simply a loving and lovable friend, and he has made sure that the Toolbox for Pastoral Management has been offered with as close to perfection as is humanly possible because of his love for his brother priests and for our Faith and our Church.

**JAMES DUBIK:** This is the 2016 Leadership Roundtable Best Practices Award to Fr. Paul Holmes, in recognition for his leadership role in designing and implementing the Toolbox for Pastoral Management, given June 30, 2016.

**KERRY ROBINSON:** And now a few remarks about Tom Healey. I have known you, Tom, for many years. I can remember my first impressions of you, which have only proven to be absolutely accurate over these years. I was dazzled when I met you because I thought you truly were the paragon of generosity in a comprehensive way. I was amazed first and foremost by how loving you are as a spouse and a father and a grandfather, that you have this wonderfully, loving, rich family life. I marveled at your leadership in your professional life, in finance at Goldman Sachs, and the command and respect that you rightly enjoy. I was absolutely dazzled to discover your civic responsibility, serving as Under Secretary of the Treasury under President Reagan, and then to find out that you also contributed to the academy at Harvard’s Kennedy School. And finally, to see your dedication, your generosity philanthropically, which is not just writing checks, but immersing yourself fully into that which you most care about, the fact that you are an important founding trustee of Leadership Roundtable, one of the architects of everything we have created, and in a particular way, the attentiveness to which you have led us all through the creation of the Toolbox for Pastoral Management.

Tonight we honor you for all of those reasons and for your great friendship to us, to the Roundtable, to the Church. Thank you for being the model that you are.

**JAMES DUBIK:** This is the 2016 Boisi Award for Catholic Philanthropy to Thomas J. Healey, in recognition for his generosity and strategic investment in the Toolbox for Pastoral Management, given June 30, 2016.

# Interview with Awardees

**MICHAEL BROUGH:** You can tell from Kerry's remarks the high esteem we hold both of these gentlemen in. So to begin our conversation about the Toolbox for Pastoral Management: where did the idea come from to combine executive leadership training and the ongoing formation of priests?

**THOMAS HEALEY:** As we started Leadership Roundtable, we talked about what we could do to make a difference, and Jim Dubik, who was nice enough to give us this award, is the godfather of the Toolbox. He wrote a paper in which he outlined what we could potentially do in terms of advanced training for priests, and that was the start of it.

My wife, Meg, and I decided in the wake of the sexual abuse scandal, we could either get mad and leave, or we could get mad and do something, and we decided to do something that was supportive of priests—that's always been an important value for us—and then the Seton Hall University connection came about. We knew Msgr. Bob Sheeran, the president of Seton Hall. We took Jim's idea, expanded it a little bit, and mentioned it to Msgr. Sheeran and he said, "I know the exact way to do this. Come back in a month." And we came back in a month and he introduced us to a priest on his faculty named Paul Holmes, who was then just about to become to the executive vice president of the University. And Paul, in his usual understated style, handed us a 14-page prospectus—

**FR. PAUL HOLMES:** I knew none of this. I had never heard of Tom

Healey; I had never heard of Leadership Roundtable. I was just a university vice president and found out from the president of Seton Hall that he had had dinner with Tom Healey and that Tom had this idea that what the Church needs now is an executive-level education program for new pastors. So the president came to me and asked me to do it. I found out that Tom was a Fellow at Harvard, and it was just coincidental that Msgr. Sheeran had sent me to Harvard for two weeks for a management development program, and for two weeks all of these professors taught every single thing you needed to know in order to be a vice president at a university. I went to the Harvard website and changed everything to apply to Catholic parishes. Then I came to a lunch with a lot of pastors from New Jersey, and at dessert, I handed out copies of the proposal that I'd written, and I thought I was done. I had no idea that I was going to have anything further to do with it. But Tom asked, "What are our next steps?"

The next steps were that Tom was going to be the philanthropist behind all of this. And I went on sabbatical. Three days after I came back to the United States, there was a phone call from Tom Healey asking, "So where's that Toolbox?" Becoming involved with the Toolbox turned out to be one of the most rewarding experiences of my life.

**MICHAEL BROUGH:** I've had the privilege of seeing this relationship blossom from those beginnings to not just a great partnership, but to a deep friendship. Partnership is a theme that goes throughout the Toolbox. It's been partnership between Seton Hall University, Leadership Roundtable, the faculty which comes from around the country, and Lilly Endowment, who provided support following Tom's wonderful example. What are the important elements of partnership for each of you?

Why was partnership important?

**FR. PAUL HOLMES:** It's hard to imagine the Toolbox ever coming about without all of the partners that we've had. Tom made sure that there was a "wisdom group," and Tom would make sure that we would have telephone conversations about which faculty we would have - from Leadership Roundtable staff and others they knew from across the country and the only thing I asked was, "Have you heard them speak?" After a number of phone conversations with the "wisdom group," we had 14 experts in human resource management, internal financial controls, financial management—all of the things that a priest needs to know if he's going to be a pastor, even though those aren't the things that we learn in the seminary. I looked forward to this with bated breath myself. Not being a financial manager, I didn't know what an internal financial control was, but we had the best possible faculty and the best possible



Thomas Healey

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*More smart people working together got a better result than one smart person working on her own.*

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partners to help us get that, including Lilly Endowment.

We advertised in many of the journals and magazines that priests read and priests came from all over the country for this first Toolbox. We just had a marvelous experience, but we wanted to do more. After 2 years, Lilly Endowment gave us the wherewithal, the support and real encouragement to offer the Toolbox twice a year, and to do it in different parts of the country. We went as far afield as Tucson, Arizona; and Jacksonville, Florida; Baltimore, Maryland. And without these partners, the Toolbox wouldn't have gone the way it has.

**MICHAEL BROUGH:** Tom, I know that partnership has been important for you in your philanthropy as part of Toolbox and various other consortia, including FADICA. Why is partnership relevant and important?

**THOMAS HEALEY:** Well, let me give you an example. We have a godfather of this project in Jim Dubik. We have a godmother in Kerry Robinson, because she is the one who's the connection to Lilly Endowment and had the insight that this is something that would appeal to them and teed that up and actually made it happen.

Why is partnership important? One reason is because the path isn't always as straightforward as we make it sound. At one point I was in despair. I think it was probably after a Roundtable meeting in

California at Santa Clara University, when somehow I went to the Jesuit church in San Francisco, and, of course, I wasn't paying attention during the middle of the Mass, but it was when Fr. Holmes was on his sabbatical, and I was despairing whether this would ever occur. I said, well, we can do it without him and we can make it into a book. We could take the concept, because the concept of the 14 or 15 modules existed, we had identified the potential writers. God called me away from—not from Communion, but maybe from the offertory—and gave us the idea of the book.

Liturgical Press became a partner. And a more general answer to your question, Geoff Boisi and I were partners for many years at Goldman Sachs; that's how I first raised my hand to say yes to Leadership Roundtable. We grew up in a tradition where more smart people working together got a better result than one smart person working on her own. I absolutely believe in that. I believe in that with Meg. I believe in that with my kids. So for me, it has always worked, and it's certainly worked often for the Roundtable.

**MICHAEL BROUGH:** Fr. Paul, you talked about the importance of the selection of the faculty. Consistently the

faculty have been highly evaluated, they have been consistently good. How have you maintained that over 14 different Toolboxes now, over multiple years, in different parts of the country, with different faculty?

**FR. PAUL HOLMES:** Well, certainly, the first thing we wanted were men and women who were experts in their field who would be able to answer any question that a pastor or future pastor would want to ask. So we all agreed they had to be experts.

Then the second thing that has made the Toolbox a success is that our presenters needed to be people who know the vocabulary, who have actually spoken to priests before; that priests, upon hearing them, will say to themselves, "They speak my language. They know what it's like to be a priest, to be a pastor. No matter where I'm from, they know what I need to hear."

I think that's been two of the keys to success, that they're experts and that they know a priest's vocabulary. I've insisted, as well, that every speaker be a son or daughter of the Church and to speak with the Church's own vocabulary. They feel very comfortable speaking about the Holy Father, speaking about



Fr. Paul Holmes with Michael Brough

the Church's documents and are able to quote them without seeming as though they're talking about something they've never done before.

**THOMAS HEALEY:** Fr. Paul is being his usual modest self. The other thing you need to add to that is the rigor of his intellectual assessment of each of the speakers. Every conference is just outstanding and everybody gets rated on two dozen elements in every presentation, and then it gets fed back and marked, and it's a very Darwinian exercise. In all of my experience of doing reviews in business and at Harvard and with Paul, the uniformity of 9s and 9-pluses of these speakers is just extraordinary. Heaven help you if you go below 8 because you're going to be sent to the wrong address the next time!

**FR. PAUL HOLMES:** It's like what happened to the dinosaurs: when the meteor hit, they were never heard from again. Give a 4 out of 5 to one of my speakers, and the speaker is never heard from again because I only want our priests to have someone that they can give 5 out of 5's to, and we try very, very hard for that.

**MICHAEL BROUGH:** Your obsession with evaluation does not just apply to presenters. It also applies to every priest participant who does a self-evaluation as well. You do an overall evaluation of each program. You've then done an external evaluation of the program. What have those results shown you and how has it shaped the evolution of the Toolbox over the years? As Tom said, it didn't come out fully formed.

**FR. PAUL HOLMES:** No, it didn't, it came out looking like a baby, maybe a little early! But I'm a professor, and over 28 years, higher education has gone

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“*What we've done is worked from the priest's assessment of their own comfort with the management tasks that they're asked to perform, and we've changed what we offer to match what they say their needs are.*”

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through quite a bit. The public and our politicians insist that we prove that what we think we're doing we're actually doing, that there really are outcomes that are worthy of everyone's investment. I was used to being evaluated. Donors and foundations, like Lilly Endowment, want to know how you're spending their money, and they deserve to know whether or not this was a success. I can't go to donors, even to Tom, and say, "Oh, it was terrific." I want to give them evidence.

I happened to know the president of Alverno College in Milwaukee, Wisconsin. The professors at Alverno for the last 35 years have been known throughout the entire world for assessment. They assess every single thing they do. People come from all over the world to study how Alverno teaches.

I asked my friend, "By any chance, have the professors at Alverno ever looked at the priesthood?" And it turns out, that back in the '80s, the Archdiocese of Chicago asked Alverno College to come up with a list of the pastoral tasks or characteristics of priests, and there were 81 of them; 81 things that parish priests are expected to do. I showed it to my Roundtable colleagues, and they said, "Well, we can't do all that in a week." But I got it down to 35, and that became the Pastor's Self-Evaluation. And I ask every priest who comes to the Toolbox on the very first morning, "On a scale of 1 to 5, 'Extremely Comfortable' to 'Not Comfortable At All,' How do you feel about

performing each of these 35 tasks?" This has let us know—when they say not at all comfortable to 16 of these 35, I go back to my colleagues and say, "We need to add a presentation on this or that, for example, on how to run an effective meeting," which was not on our list of topics at the beginning. What we've done is worked from the priest's assessment of their own comfort with the management tasks that they're asked to perform, and we've changed what we offer to match what they say their needs are.

**THOMAS HEALEY:** One of the strongest points of feedback from the first Toolbox was there was no overarching introduction to it. So the first presentation in the program is now Fr. Paul on the theology of management, which is really a beautiful homily on why pastoral leadership and management are important.

**FR. PAUL HOLMES:** It was one of those times when something was said on one of our "wisdom group" phone calls and there was silence. The publisher that we were thinking of bringing our material to mentioned there was nothing spiritual or theological joining all of this together. It turned out it was an important thing to add because the reason that the Toolbox exists is because so many priests say, "I wasn't ordained for this. I wasn't ordained to look at budgets. I wasn't ordained to hire and fire," but "I was ordained to pray, I was ordained to preach, I was ordained to celebrate the sacraments." So I thought, my brother priests do

need to hear how this is why you were ordained and this flows from who you are as a priest, and that became the first presentation of the Toolbox and the first chapter of our book.

**MICHAEL BROUGH:** Why is measuring outcomes important to you, as a philanthropist, Tom? You've just received a philanthropy award, you invest your time, your talent, your treasure in vital endeavors. Why is it important that there are measurements of the impact and the outcomes of your philanthropy?

**THOMAS HEALEY:** Everyone has limited resources, and you have lots of demands, and so we have to make priorities and choices. Our foundation is modest in scale. We must get 15 or 20 requests into our Foundation a week, almost all of which are meritorious. How do you adjust for that? One of the adjustments you make is, what are the things that you want to invest your time in? If money is a limited resource, you want to make it even better through your time. But then if it's limited, you want to make it good. That's why you care about outcomes.

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*Everyone has limited resources, and you have lots of demands, and so we have to make priorities and choices.*

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**MICHAEL BROUGH:** We've spoken about the early development of the Toolbox. Can I point us toward the future now? In the last year, the Toolbox has undergone a massive expansion from two Toolboxes a year to seven or eight this year. It's also taken on a different model, a model that takes a capacity

building, train the trainer approach, where institutions, seminaries, dioceses, and religious orders are now putting on the Toolbox themselves with our assistance and support. What are your hopes for how this evolution, this change in the Toolbox model, can help the Church in the future?

**FR. PAUL HOLMES:** None of this would have happened without Leadership Roundtable because of the relationships that the staff of the Roundtable have with dioceses and archdioceses and religious orders around the country. I thought that we would always have to rely on a donor because I reminded everyone that priests have no money, and to take a week off from their ministry and have to pay to “go to school” for a week didn't sound to me, as a brother priest, like a very successful strategy. But, obviously, depending on a donor or a foundation or an endowment indefinitely is also not a sustainable strategy.

It was certainly with the help of the Roundtable, who year after year are able to approach bishops and archbishops who they already know and the directors of priests' continuing formation around the country and be able to convince them—and we have the data to demonstrate it—that, “investing in your priests and in the lay men and women who are also going to be pastoral leaders in your parishes, that's a great investment, Archbishop.” And archbishops and bishops and provincials of religious orders have certainly responded.

I'm a professor so I am only available between semesters. I loved hosting all the Toolboxes, but I said to the Roundtable, now my colleagues and my friends, “Here, take the Toolbox everywhere and offer it whenever dioceses say they need it—even without me.”

**THOMAS HEALEY:** Going forward, the problem is very simple. We've done 14 Toolboxes; we've touched approximately 350 priests. There are 14,000 parish priests. Reaching 35 priests at a time isn't very efficient given the need. That's a large part of what spawned the book. As it got refined it became clear that there were some new chapters that should be in and maybe some that should be removed. Someone came up with the great idea, “Well, what if we do Volume II?” So Volume II is on the horizon. The publisher has accepted it. The assignments have been given. The drafts are underway.

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*Take the Toolbox everywhere and offer it whenever dioceses say they need it*

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**FR. PAUL HOLMES:** Liturgical Press is thrilled. I think getting first prize in the Pastoral Ministry category really boosted sales. It was the same year that our own Kerry Robinson wrote her book on abundance and stewardship, and her book won first prize too. So it was a good year for the Roundtable! But it also helped convince Liturgical Press that a second volume might do very well.

**THOMAS HEALEY:** Continuing on a little bit of speculation, we've also talked about and thought about a Spanish edition. Today, we talked about meeting the needs of the Hispanic portion of the Catholic Church. We've also done some experiments on distance learning. In many ways, this would be a perfect use of distance learning because the priests could take advantage of it wherever they are and whenever they wanted, but it

turns out that that's a technology that's still evolving. We've also thought about other potential audiences for Toolbox-like events: vicars general, finance council chairs, deacons, parish life coordinators, etc. The model is almost infinitely expandable.

**MICHAEL BROUGH:** Let's turn to questions from the floor.

**FR. JOHN HURLEY:** First of all, I would like to just ditto Kerry's accolades to both of you for the Toolbox. It's a wonderful gift to the Church. Two questions: One is about the theology of management. What aspects are about the role of pastor as leader rather than manager? My other question is, as we think down the road, my hope would be that the Toolbox could go out of business because it would be incorporated into the seminaries. Maybe you could share what would your vision be, especially as you establish relationships now with several seminaries around the country, about using those relationships to incorporate management as part of leadership information? None of us, as ordained persons in the room, ever got anything about leadership, but it is a consequence of being a pastor. Many priests today, they're immediately pastors, but don't have the mentoring experiences that many of us may have had in the room, to learn from the mistakes of our superiors. I'm just thinking, how do we ingratiate this into formation as a way of life for priests?

**FR. PAUL HOLMES:** The curriculum for seminaries comes from the bishops of the United States and their Program for Priestly Formation. Rectors will tell you that it's very hard to add more courses that aren't theology or philosophy. Because of that difficulty, the seminary at Seton Hall, for example, asked us to run a Toolbox for newly-ordained deacons, so



we've done that the last three summers. The rector of our seminary asked me, "Paul, could you come and teach a course on being a pastor?" I said, "No, but I know some people who could!" So I'm hoping we'll be able to do that as well.

When I was ordained in 1981, I was told I wouldn't be a pastor for 27 years because that's how long it took for the priests ahead of me to die, and we would just wait until then. Now that is down to 2 or 3 years. We've got to find a way to put leadership and temporal management courses into the curriculum at our seminaries so that our future pastors have a chance, and also to not only have a chance but to really be good at it by the time they start.

**THOMAS HEALEY:** Paul raised a good distinction between management and leadership. My guess is that management should be separated from the seminary.

And St. Mary's in Baltimore has had some success teaching a weeklong course in the summer. I would say that in the seminary, if the bishops ever ask me, to not just have something on leadership of pastoral councils or accounting, but leadership in terms of leading a parish and being a person who is going to be a leader all the rest of their life once they're ordained. It's a real loss to not have some segment of that.

**MICHAEL BROUGH:** The good news about seminaries is that one of the Toolboxes this year that we spoke about is at St. John's Seminary in the Archdiocese of Boston, so they will be the first seminary to host one. We also have one scheduled for next year at Mount St. Mary's Seminary in Emmitsburg. The interesting thing that we found is that the seminaries are hosting it because they also want their former seminarians who are now priests to come back, so that they build into their ongoing

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formation program rather than only in the pre-formation. That way they get the leadership training that Tom is talking about in seminary, and the administrative and management training later on.

**THOMAS HEALEY:** There is a small concern about that. The Archdiocese of Newark had a pastors' training program for a number of years that was reasonably successful, but they found that by the time it got to day five, every man had found a reason to go back to his rectory because it was a 20-minute ride. When we did a Toolbox just for the Archdiocese of Newark this year, we did it in Baltimore so that they were captured for the whole six days!

**MICHAEL BROUGH:** And they were joined by Archbishop Hebda for two of the days, and another bishop in another archdiocese also attended the Toolbox for his priests. A lot of dioceses do this sort of training at the diocesan level and when the Toolbox is institutionalized as part of ongoing formation, it gives the priests exposure to national faculty, lets them realize that this is an integral part of their role as pastor, which takes me back to the first question. Can you speak a bit about the theology of management and how you've contextualized it within what priests are ordained to do?

**FR. PAUL HOLMES:** I remind them that all of us at our baptisms were made priests, prophets, and royal persons. Everyone in this room was, at their baptism, made a priest, as Christ is

priest; a prophet, as Christ is prophet; and a royal person, as Christ is king. Those three roles are strengthened and deepened at ordination. In my theology of management, I show them this has been your whole life, and now, as a pastor, you're going to be priest and prophet and king, and these three "munera," those three tasks, (and recently I found it translated as "commitment")—that these three commitments are what you're going to be doing as pastor. This is not something "in addition" to your ordination, this is something that has been a part of you since your baptism, deepened at your ordination, and now you're finally going to get a chance to do it all as pastor. After my talk on Day One of the Toolbox, the priests are no longer able to say, "I wasn't ordained for this." Oh, yes, you were, I tell them, and these are the reasons why!

**JIM HERREL:** Leadership and management are two distinct skill sets. A good manager may not be a good leader; a good leader may not be a good manager. How do you differentiate that in the Toolbox? And how do you share that with an upcoming pastor? How do you develop that?

**MICHAEL BROUGH:** That question comes from an employee in the Archdiocese of Atlanta, who over the last 6 or 7 years have sent every single priest who is going to become a pastor to the Toolbox precisely because we are able to make that differentiation!

**THOMAS HEALEY:** There are certain things that only priests can do, but being ordained doesn't make you a manager. We hope that through the Toolbox we give priests a little help, not to be a manager, but to know how to employ managers and use the laity, which is the essence of what the Roundtable has been trying to do as a gift to the Church. As I said, I would love to think that every priest can be a leader. It can take lots of different forms, and Paul may tell me I'm overly optimistic, but I would certainly hope that's true. That's why I would encourage that training and thinking about as part of the seminary, because as a priest, you are a leader. Even if you do nothing other than the sacramental duties, you're leading a group of people who want to be led and some of whom today in the Church unfortunately are very frustrated with the leadership they're getting.

**FR. PAUL HOLMES:** I bring in 14 experts, and I've got you from Sunday night till Friday lunch, and in that period of time, I can make you neither a leader nor a manager, but what I can do in six days is present to you a vocabulary and a vision and acquaint you with the issues that you're going to be involved in. One of the things that I insist upon in my own presentation on the theology of management is authenticity: that you have to be who you are wherever the people of God find you. But in six days, what I can do is make you less fearful about what you're about to embark upon, to rely on your lay sisters and brothers in your parish who are experts in management and listen to them and get advice from them. The first time I saw a budget, as a vice president at Seton Hall, a \$250 million budget, I didn't know how to count the money in my left pocket! It would have helped if somebody had said, "This is how to read a profit and loss statement." We want to do that for future pastors, to acquaint you with some of the things that

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your business manager, your DRE, your staff, are going to look to you, Father, to make decisions about. You at least need to know the vocabulary.

**PETER DENIO:** Paul, can you share the reason for the name that I believe you were instrumental in developing for the project?

**FR. PAUL HOLMES:** We called it a Toolbox because we wanted to offer tools. In the seminary, you get a lot of theory. Now, I'm a priest, and I'm inviting my brother priests, so there better be morning and evening prayer every day, there better be the celebration of Mass every day. Once a week, while we're together, we'll have Adoration and Benediction of the Blessed Sacrament. I bring in priests to hear Confessions. I want this to feel like a spiritual week. That's what priests are used to going on a retreat. I always have it at a retreat center so that it feels like a retreat, but what we want to convey is that—and this is what we tell all the faculty—they don't need theory right now, they need tools so that they can hit the ground running once they're named pastor. Every single one of our presenters knows that I'm looking for tools. And I sit for every single talk, so you can't get away with theorizing your way out of fiscal management. I want these guys to have tools to go home with and say, "This is what I'm going to do in my parish day one."

**MICHAEL BROUGH:** I have experienced priests moved to tears in gratitude when they come up to presenters at the end of a presentation or at the end of the week saying, "I now know what I can do in that particular situation, with that particular person. I feel equipped." It's a huge relief off their shoulders because these are good people trying to do the best job that they possibly can, but have not been equipped with the tools. It's very rewarding when you see that impact on

priests even at the end of six days.

**FR. PAUL HOLMES:** Michael does a presentation on leadership development. How do you—as one person who knows he needs to be a leader and wants to be a leader, how do you develop as a leader? Michael does a very good job with that. That is in this Toolbox as one of the most important things we do.

**MICHAEL BROUGH:** Tom's brother, Fr. Joe Healey, recently celebrated his 50th anniversary as a Maryknoll priest. One of the things that Fr. Joe tells people that he learned from his younger brother, Tom, is the importance of leaving an audience with a takeaway. So, Tom, if you had one lesson that you have learned from the Toolbox initiative which you think could assist the Church as we plan for the future, what would it be? What's your takeaway?

**THOMAS HEALEY:** How do we expand it beyond 350 priests? That's my big takeaway because I went through some of the things potentially on the radar screen. There are so many different opportunities, and how do we prioritize and then how do we finance them?

**FR. PAUL HOLMES:** The last 36 hours has been about the "Francis Effect." When he burst on the scene, Pope Francis gave us his vision of the Church, and it was that the Church is supposed to be a "field hospital," and that no one asks a wounded soldier about his cholesterol level. He said you heal the people's

wounds. He said, "Heal their wounds and then take care of everything else." And, of course, his predecessor, Pope Benedict XVI, had said priests should not become "holy bureaucrats."

How do I do this? How do I present a week where I want them to be who they are as priests, and that is, men who heal the wounds of their sisters and brothers, but without becoming holy bureaucrats? I think we do it by remembering that healing wounds is what a parish is supposed to be about and that "healing wounds" is simply another way of saying "salvation." Jesus saved as he went around healing our wounds.

I've been able to learn from the Toolbox that priests, in becoming pastors, don't want to become holy bureaucrats; they want to heal the wounds of their brothers and sisters. Therefore, the Toolbox is offered in a spiritual context with prayer every day at the beginning and at the end of everything. By doing this, we're trying to get across—and most of the men who have written me back afterwards have said they agreed—that salvation is the goal of every pastoral task. It's also supposed to be the goal of every managerial task, maybe not out in the secular world, but in a parish. It's supposed to be the salvation of souls, and we try and support that in our brother priests at the Toolbox. I've learned that priests not only want that, but embrace that, even as they're learning how to look at a profit and loss statement.

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*The Francis Effect and Changing Church Culture:  
Advancing Best Managerial and Leadership Practices*

June 29–30, 2016

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[leadershiproundtable.org](http://leadershiproundtable.org)

## Summary of Learnings and Recommendations

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### A Renewed Vision: Agility in a Changing Landscape

#### 1 | What do you identify to be the biggest challenge in communicating your mission today?

- a.** Capacity for agile and robust communications and data analysis operations, particularly social media
- b.** The tendency to promote in order to remove someone as a challenge to good management
- c.** The volatility in environments of Catholic ministries
- d.** Transparency has a whole new meaning in this new environment: behavior, business dealings, planning and even pastoral relationships.  
All need to assume that everything can come to light
- e.** Being naive does not serve the Church well
- f.** Vision needs to be simple, as does the message about vision
- g.** We don't do a good job of welcoming in our parishes
- h.** We struggle to maintain control of the image of the Church. How can we better do this?
- i.** Speed - there is an expectation for an immediate response (for example, Orlando shooting)
  - i.** How do you tweet about something tragic in 140 characters or less?
- j.** De-centralization - there is no easy way to collect and distribute the good communications from Church leaders
- k.** Antagonism toward the Church from the media and the public, and not knowing how to handle this
  - i.** Media has inherent bias against many of the issues the Church addresses.
- l.** Defining what the mission is, exactly, is the hardest piece
- m.** How do you get from the small message to the bigger message? Especially in a culture that seems to want messages dumbed down?
- n.** Jesus engaged people where they were. How do we do the same?
- o.** How are we responding to anger in our culture?
- p.** People use social media for talking. If tweeting and facebooking is the way that people communicate, when are people listening?
- q.** Geography: the expanding nature of some dioceses and providing a coherent message to all constituencies
- r.** There's so much noise, bombardment with other messages. How do we break out of it?

- s.** Parishes need to communicate via multiple platforms
- t.** Lack of knowledge is a problem. We do an online survey, for instance, but still need printed copies for people offline.
- u.** Movement to new media doesn't necessarily mean sunsetting of old media (eg parish bulletins). We need a strategy, not just a new technique.
- v.** A picture can be worth a thousand words
- w.** Actions are another medium of communication. Living the message is essential.
- x.** Another challenge is internal control. Who manages this?
  - i. The Pope has great tweets and internal controls. Why reinvent something when you can retweet him?
- y.** Some are addicted to social media. How do we ensure we are not contributing to and fostering this addiction?
- z.** Themes and priorities are a good foundation for communication strategy - getting key people to focus on three or four things. Then you can respond both quickly and effectively.
- aa.** Focus on engagement not entertainment (especially among young people.)
- bb.** Catholic culture of humility keeps us from shining a light on our good works
- cc.** How to get the attention of people we are trying to communicate with? We are conducting listening sessions in our parish and it has been very successful.
- dd.** Brevity in messages is more effective.
- ee.** Sometimes we focus too much on millennials when most active parishioners are older. How do you reach them too?

## 2 | What strategies have you found effective in your organization for institutionalizing best practices?

- a.** Involve the communications team in a discussion/decision-making process and be represented on the core leadership team.
- b.** Promote the candidate (Jesus) and they will join the party (Church)
- c.** The bishop who is currently the head of communications for the USCCB uses social media well (short videos and photos)
- d.** Fostering communities of trust and empathy encourage the building up of the Church
- e.** Streamlining management
- f.** Invest in better systems of management
- g.** Creative destruction (preventing forest fires for years when forest fires should be happening in small pockets so we don't have a huge fire) - create an ecosystem where venture capital is used for the emergence of good ideas
- h.** Pope Francis provides a model
  - i. Using actions, not just words
  - ii. Not defensive; open
  - iii. Don't wait for people to come to you, go to them
  - iv. Be authentic
- i.** We need to look to models like Fr. Jim Martin, S.J.; he engages back, and he deals well with people who are negative.
- j.** When there is kindness, people will respond positively
- k.** There are real benefits to being on social media; one of them is that you can create a community of empathy and compassion especially with people who do not live near you.
- l.** Video conferences

## **1 | What lessons can the Church in America learn from the Vatican about financial reform and accountability?**

- a.** Evidence of how change needs to be deeply cultural, not just organizationally and structurally
- b.** This is trans-generational work for the Church; not only at Vatican level but at US and diocesan level too
- c.** It takes highly ethical and professional people to bring the Church forward in this regard
- d.** All the right things have been said, and right actions been initiated by Pope Francis.  
Why are we still getting resistance by some key people here in the US?
- e.** Transparency to all constituents (clergy and laity) is crucial

## **2 | What best practices for financial transparency and accountability can the Church in America share with the Catholic Church in other countries?**

- a.** Annual financial reports
- b.** Transparency throughout decision-making process

## **3 | What best practices does the Catholic Church still need to implement, at the parish, diocesan, national and Vatican levels?**

- a.** An understanding that the Church is NOT a business, but rather business-like. Mission always comes first.

## Changing Church Culture: Institutionalizing Best Managerial and Leadership Practices in Every Parish in Every Diocese

### 1 | What best practices did you hear that might be applied to your parish, diocese or organization?

- a. Employee evaluation at both parish and diocesan level
- b. Getting key people in the right positions at the right time (with the right incentives)
- c. Jesuit formation is looking to “right-time” their formation to the Jesuit’s immediate managerial and leadership needs
- d. Importance of thinking across generations because some kinds of leadership and managerial practice actually have to die for the new to rise
- e. Must be both top down and bottom up because choosing one or the other does not work
- f. Dioceses and parishes need a clear, compelling and coherent plan of action
- g. The idea of applying to Lilly Endowment and other foundations for a grant on managerial best practices
- h. Separate parishes from parochial schools
- i. Sponsoring higher education for lay leaders, much like we do for seminarians
- j. Co-responsibility and collaboration
- k. Offering business training to parish leaders - priests and lay alike - with an emphasis on pastoral practice
- l. Purpose and clarity of roles is helpful
- m. Include deal-closers and a variety of skill sets in decision-making process
- n. Knowing where we want to end up in a few years is key
- o. A diocesan synod can help demonstrate to laity that they can no longer be passive bystanders
- p. “Love them back to God.” When people come to the Church looking for something, build on it. Don’t shut the door.
- q. Part of challenge for pastor is deciding what decisions you bring to which groups. Must understand extent of own power. Careful balance and understanding of how to use power properly.
- r. Use the breakdown of a situation as an opportunity to understand root cause. Don’t just put a bandage on it.
- s. How to ensure diversity in parish councils?
- t. Sometimes when you try to make a minister an expert, it doesn’t always work. It’s a challenge to turn a professional into a minister as well.

### 2 | What strategies have you implemented for bringing about cultural change in your organization?

- a. Employee evaluation that involves staff writing vision paper of what they want to do in coming year
- b. Grievance procedures
- c. Moving from a conscription-based organization (people feel they must attend church) to a volunteer based organization (people not feeling they must attend) means finding different ways of training leaders
- d. After a parish merger in Michigan, pastoral council was created with the mission of thinking about the big picture and asking the important questions about where the parish should go
- e. Before another parish merger, we brought in a team of psychologists to help us bridge the cultural and theological different between the two parishes. We asked a lot of questions about what they might be losing, and made sure that what they were afraid of losing wasn’t lost.
- f. A change in the archbishop led to a cultural change because he hired people with a professional, customer service orientation. The view that every person is a customer, and I am going to take care of you.
- g. Parish survey made people feel heard

- h.** Use of Catholic Leadership 360 for clergy and lay leaders
- i.** Keep centered on mission
- j.** Have to be careful not to run parish like a business, while still using business techniques
- i.** Running a Catholic institution is like running a family business
- k.** Do careful when hiring parishioners
- l.** Must be judicious about adopting some best practices. Not all are appropriate for every situation.

### **3 | What resources would help you bring about institutional change in your parish or diocese?**

- a.** Guides on communications, compliance evaluation, key performance indications, volunteer management, and managing transitions.
- b.** Assistance coordinating diocesan activity (various departments are competing for constituents' time)
- c.** Potential for Leadership Roundtable to be a key coordinator of coherent means for creating this kind of change because that kind of coordination and commitment is unlikely to come from anywhere else
- d.** Do you have a specific model of change that you have adopted?
- e.** More grant opportunities for parishes
- f.** Interactions with seminaries to encourage more education around financial management
- g.** A template for a parish financial report and for a strategic plan (with diagrams, cover letter, to help parishioners understand report)
- h.** Each parish ought to have an audit when there is a change in pastor
- i.** Grant money for this type of leadership development
- j.** Resources to manage transition
- k.** How will Leadership Roundtable address new pastors and those who may be resistant?
- l.** How to run a small, rural parish?

# 1 | From this session and the day's conversations, what are the major trends you identify that we face in the Church that will impact mission of leadership and managerial excellence?

- a. Difference between bishops being overly involved in priests' work and goals, and not being involved enough
- b. Need for feedback system for priests and pastors
- c. Human resource development at broadest sense continues to be an area of question and need for education and focus
- d. Difference between old and young priests in utilizing lay people
- e. How to structure pastoral and finance councils most effectively
- f. Multi-parish pastoring
- g. Trends of transparency and openness
- h. Multicultural environment
- i. Growing ownership of the Church by laity
- j. Secularism may be a spent force; there is a search for meaning that transcends secularism. This means there is an increased need for marketing and advertising.
- k. Parishioners are demanding improvements in accountability and transparency and in a lot of places parishes are rising to the challenge
- l. Increased accountability for sex abuse in the Church
- m. Developing a theology of management
- n. Understanding that leaders in other cultural backgrounds are identified and raised up in ways that are different from the Anglo culture
- o. Naming the "culture of mediocrity" that exists in our workplaces because of lack of training in performance reviews and a lack of incentives for workers who excel
- p. Decline in number of Sacraments administered is strong trend
- q. Developing Latino/a ways of ministry, not merely translating Anglo ministry into Latino/a words
- r. We no longer have much time to apprentice new priests before they become pastors; not all priests can be good pastors
- s. Can't get into the mindset of "it's all behind us now." What's behind us still matters.
- t. Chanceries are often bastions of Eurocentric thought
- u. Is seminary formation doing its job to identify future successful candidates?
- v. Trend of church shopping may be fueled by consumerism and sense of entitlement. Also losing people to evangelical communities. Can't form people with such a rigid ideology that can't accommodate their lives.
- w. Consequences to poor evangelization
- x. Need to put more energy into formation of people in the pews. Problem isn't that the message isn't true; it's that it isn't attractive.

## 2 | What are the major reasons for hope that cultural transformation will happen in our practices?

- a. Issues we now face are too complex for any one sector to address. Church has an important role to play to partner with other sectors to address these challenges. These are win-win opportunities.
- b. Example of partnership: Jubilee Schools in Memphis
- c. Pope's Laudato Si provides opportunity for collaboration on the environment
- d. Increased enrollment in Catholic schools in many places
- e. Pope Francis
- f. The second careers of the people from the business world who are bringing business practices into the Church. They are not walking away; they are trying to push from the bottom up.
- g. Seeing people who are at the top willing to stick their necks out and be embarrassed, and say that there are things they don't know, or that they are willing to have assessed
- h. That there are bishops supporting communities that have traditionally been excluded
- i. Pope Francis is saying the message of the Church but in a different way
- j. Younger bishops
- k. Growth of Hispanic population and leaders from other cultures, including young Catholics
- l. We're doing a better job of including and mentoring international priests
- m. Young people are developing a relationship with Christ in more personal, albeit less institutional, ways
- n. Shift from autocratic leadership to servant leadership
- o. Foundations (like Lilly Endowment) are showing innovative, creative ways of catalyzing cultural change
- p. Emerging models of pastoral leadership are challenging, not always an improvement (for example, one pastor, four parishes) but creativity is a good sign
- q. We're increasingly aware of deep pockets of pain. Change is most often experienced as a loss. But Leadership Roundtable is helping with messaging, change management, conveying hope.
- r. Grassroots movements responding to Francis' message

## 3 | What ways might you partner with Leadership Roundtable to advance the movement of best managerial practices in the Church?

- a. Is it time for Leadership Roundtable to do more promotion of examples rather than keep teaching?
- b. Leadership Roundtable needs to tell their story in writing and in digital media and help us explore our own media strategies
- c. Leadership Roundtable agenda is now in a context that lacks urgency like it did 10 years ago, yet a crisis clearly looms
- d. There is an important role for the Roundtable to support Roundtable-like organizations in other countries
- e. Do more to disseminate best practices to various parishes and dioceses
- f. Increase formal partnership opportunities - attending meetings, sharing resources, broad-based conversation, including personnel from the Church in the conversation
- g. Help pastors in outreach ministries
- h. How to really instill accountability at every level in the Church?



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## Speaker Biographies

**GEOFFREY T. BOISI** is founding chairman of Leadership Roundtable and chairman and CEO of Roundtable Investment Partners LLC, an independent private investment partnership providing strategic advice and planning, investment management, and merchant banking services for families of substantial wealth as well as select institutions generating high performance wealth creation and social legacy-building opportunities.

In 2003, Mr. Boisi retired as vice chairman of JPMorgan Chase, where he served as co-CEO of JPMorgan, the firm's commercial and investment bank, and a member of 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. Prior to the formation of The Beacon Group, Mr. Boisi was a senior general partner of Goldman, Sachs & Co. where he served as a member of the firm's management committee and head of the global investment banking business, which included worldwide mergers and acquisitions, real estate, corporate finance, capital markets and principal investment activities. In addition, Mr. Boisi held numerous other positions during his 22 years at Goldman Sachs, including: chairman of strategic planning, co-chair of the international management committee, partner in charge of global finance, head of investment banking services, and partner in charge of mergers and acquisitions.

He is an overseer of The Wharton School of the University of Pennsylvania; serves Boston College as a trustee associate and founding sponsor of the Center for Religion and American Public Life; serves Carnegie Corporation of New York as a trustee and chairman of the investment committee and member of the committee on compensation; director of Oxford Analytica; member of the Founders' Circle of America's Promise; trustee of the Saint Thomas More Chapel & Center at Yale University; and a Knight of Malta.

**MICHAEL BROUGH** is the director of strategic engagement for 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 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.

**DANNY CASEY** has a Bachelor of Commerce from the University of New South Wales and a Master of Economics from Macquarie University. He is also a Certified Practising Accountant.

Danny has worked with Energy Australia, Ernst & Young, Lend Lease and Middletons, a commercial law firm in Sydney. He joined the Archdiocese of Sydney in early 2003 as Business Manager and in 2014 he was invited to work at the Vatican implementing the reforms approved by the Holy Father, Pope Francis.

In this present role, Danny is leading the Office of the Prefect and has responsibility for a number of critical projects, including the establishment of new financial management policies and practices, based on International Standards, the development

and delivery of training programs and the establishment of a sustainable structure and skill base to ensure the new practices are maintained and embedded for the long term. As a key collaborator and advisor, Danny works closely with the Cardinal Prefect as well as many other senior and front line staff in the Holy See and Vatican City State.

During his time as Business Manager at the Archdiocese, Danny worked closely with the Cardinal, Parishes and Catholic agencies and provided advice and support on the administration and management of projects, finance and assets.

Away from work Danny spends time with his wife of more than 30 years, Annie, and does his best to stay in contact with his two adult children Bernadette, 28, and Damian, 26, who live in Sydney. Danny enjoys time outdoors, is a part time tennis player and would dearly love to be much better at golf than he currently is!

**BARBARA ANNE CUSACK** received her doctorate in canon law from the Catholic University of America in 1987. She served as a judge for the Archdiocese of Chicago before becoming Vice Chancellor and then Chancellor for the Archdiocese of Milwaukee. She has been an active member of the CLSA since 1983, serving on the Board of Governors and on several committees. Currently she is a member of the Convention Planning Committee. She has served as a consultant for a variety of dioceses as well as USCCB committees. She has published and given talks on a variety of subjects, including diocesan pastoral councils, the role of the diocesan bishop in relation to Catholic schools, diocesan synods, the vacant see, and power of governance. She has taught canon law at Catholic University, St. Francis de Sales Seminary, and Sacred Heart Seminary and School of Theology.

**ELIZABETH A. DONNELLY** is a trustee of the Mary J. Donnelly Foundation. A former Maryknoll Lay Missioner with graduate degrees in theology and political science, she seeks to promote lay ministry, knowledge of Catholic social thought, and the further inclusion of women in the Church's leadership.

She currently serves on the boards of FADICA (Foundations and Donors Interested in Catholic Activities), the Gregorian University Foundation, the Ignatian Solidarity Network, and Voices of Faith.

**MOST REV. BISHOP THOMAS DOWD** was appointed by Pope Benedict XVI and is currently serving as Auxiliary Bishop of the Archdiocese of Montréal. Dowd was ordained a priest on 7 December 2001. After his ordination, Dowd was assigned as an assistant pastor at the Montréal parishes of Holy Name of Jesus between 2001 and 2002 and Saint Thomas à Becket between 2002 and 2005. Between 2005 and 2006, He was the parish administrator of St. Veronica and assistant pastor of St. Luke. In 2005 until 2006, Dowd also served as the hospital chaplain for

Lakeshore General Hospital in Pointe-Claire. From September 2006 until his episcopal ordination, Dowd worked as part of the diocesan curia as Associate Director for the Office of Pastoral Personnel, and as Director of the Diocesan Formation Services.

**LT. GEN JAMES M. DUBIK** (US Army, Retired) is a trustee of Leadership Roundtable. He is a husband, father, grandfather; uncle, son, and brother; leader; innovator; former infantryman, paratrooper, and ranger; and commander at multiple levels. PhD in philosophy from the Johns Hopkins University. President and CEO of Dubik Associates, Senior Fellow at the Institute for the Study of War and the Institute of Land Warfare; member of the Council on Foreign Relations and the National Security Advisory Council, U.S. Global Leadership Coalition; 2012-2013 General Omar N. Bradley Chair in Strategic Leadership; a member of the U.S. Army Ranger Hall of Fame as well as a distinguished member of the U.S. Army 75th Ranger Regiment. Published in a variety of publications. His forthcoming book is *Just War Reconsidered: Strategy, Ethics, and Theory*. Quoted in numerous print and on-line media, frequent lecturer, panel member, and media analyst on national security issues. Lives in Alexandria, Virginia with his wife, Sharon, and takes great pride in their two daughters, sons-in-laws, and seven grandchildren.

**GENO FERNANDEZ** is the Head of Strategic Execution for Zurich North America Commercial. His responsibilities include developing, elaborating and driving the execution of strategy; leading operational planning; and chairing operating reviews for all businesses and shared services.

In addition, Geno leads the execution of critical strategic initiatives for Zurich North America, including: building transformation to a customer-focus organization; enhancing market insight into customers, brokers and business flow; and the simplification of operating processes.

Geno is an active member on local and national non-profit boards, including the National Leadership Roundtable, Cristo Rey and the Finance Committee of the Archdiocese of Chicago. He is the Vice-Chairman of Chicago Catholic School Board, which governs and operates 250 elementary and high schools in Chicagoland. Geno joined Zurich in 2012 from McKinsey & Company, where he was a senior partner and a leader in the Insurance Practice. There, he had 13 years of experience in serving insurance companies in corporate strategy, operations and major transactions. He has served as a special attaché for economic affairs to the Secretary of State in the diplomatic staff at the Vatican; a lecturer at New College, Oxford; and a counselor at a women's shelter in Indiana.

A Rhodes Scholar, Geno has a Doctorate in Philosophy from Oxford University and a B.A. summa cum laude from the University of Notre Dame.

**THOMAS J. HEALEY** is the founder and managing partner of Healey Development LLC. Mr. Healey is a founder of Prisma Capital Partners, a founder of the FIA Timber Partners funds, a founder and partner of Anthos Capital, a private equity firm focused on small-capitalization private equity. Mr. Healey is a Senior Fellow at Harvard University's John F. Kennedy School of Government, where he taught a course in Financial Institutions and Markets.

Previously, Mr. Healey was a partner and managing director of Goldman, Sachs & Co. where he created the Real Estate Capital Markets and Pension Services groups. The Pension Services Group, the first of its kind in Financial Services was focused on assuming relationship management for and coordination of products and services across products and regions to the top 100 leading Pension and Endowment Clients globally. As this platform expanded, Mr. Healey assumed a leadership role in the expansion of Goldman Sachs Asset Management to \$400 billion in AUM through his role leading Institutional Marketing.

Additionally, Mr. Healey played a key role in product creation in Alternatives and sat on relevant investment committees at Goldman Sachs. Mr. Healey also chaired Goldman Sachs' own Pension Plan and served as Co-CIO of Goldman Sachs' management of the Central States Teamsters Pension Plan. Before joining Goldman Sachs, he was Assistant Secretary of the Treasury for Domestic Finance under former President Ronald Reagan. Prior to that, he was head of Corporate Finance at Dean Witter Reynolds.

Mr. Healey received a B.A. from Georgetown University and an M.B.A. from Harvard Business School. Mr. Healey formerly served on the Board of Trustees of the Rockefeller Foundation and Georgetown University's College Board of Advisors, and chaired both institutions' Investment Committees. He is also involved with several other non-profit institutions.

**JIM HERREL** is the Parish Administrator/CAO at the Catholic Church of St. Ann in Marietta, Ga. St. Ann's is one of the top five parishes in registered families and revenue in the Archdiocese of Atlanta. Jim has served in this capacity since March of 2008. Jim is a member of the Archdiocesan Finance Council and serves on two standing committees, Audit and Budget and Operations, of the council.

Prior to joining St. Ann's Jim was the COO for Johnston Textiles in Columbus Georgia. JTI was a domestic manufacturer of fabric used in the napery, industrial and contract fabric businesses. Before joining JTI Jim was the Sr. Vice President of Supply Chain Management for the Arrow Shirt Company responsible for both domestic and off shore production. In this capacity Jim has conducted business in over thirty countries around the world. Jim was a member of the Executive Committee for Arrow and prior

to moving to the operational side of the business was the Vice President of Sales. Jim is a retired military officer with twenty-two years of service in the active Army and the National Guard. Jim commanded four units in his military career and is a Senior Army Aviator.

Jim is married to Ellen and they have one Angel, Andy—and one daughter Leslie and is the proud grandparent to his granddaughter Maddy. Jim is a graduate of The University of Toledo.

**REVEREND PAUL A. HOLMES** is Distinguished University Professor of Servant Leadership at Seton Hall University, NJ, teaching moral and sacramental theology since 1988. The University's first Vice President for Mission & Ministry, he later served as Interim Dean of the University's School of Diplomacy & International Relations and went on to become Seton Hall's Executive Vice President.

Having earned degrees in theology from three universities in Rome, Father Holmes also received a bachelor's degree in sociology from Seton Hall University and a master's degree in liturgical theology from Yale University. Father Holmes recently completed another five years as Spiritual Director of Clergy Consultation & Treatment Service (2010-2015), a therapeutic outpatient program for priests that he helped inaugurate (1992-1995) at St. Vincent's Hospital in Harrison, NY.

Since 2009, and in collaboration with Leadership Roundtable, Father Holmes developed the Toolbox for Pastoral Management, hosting weeklong seminars to new pastors on the administrative skills needed to lead a vibrant Catholic parish in the 21st century. He also edited the award-winning A Pastor's Toolbox: Management Skills for Parish Leadership (2014) from Liturgical Press.

**JIM LUNDHOLM-EADES** is director of services and planning for Leadership Roundtable. Previously, he was director of parish services and planning as well as associate director of education for the Archdiocese of St. Paul/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 counselling, counselling, educational administration, and business administration.

**ELIZABETH MCCAUL**, Partner-in-Charge, New York Office, Promontory, provides a broad range of financial and regulatory advisory services to clients in the United States and Europe, including assistance with matters related to safety and soundness, risk management, corporate governance, and capital markets.

Elizabeth joined Promontory after serving as the superintendent of banks of the state of New York, where she was responsible for supervision of some of the world's largest institutions and most of the foreign banks operating in the United States, as well as community banks, mortgage companies, and the overseas banking activities of investment banks and insurance companies. All told, she oversaw financial institutions representing \$2 trillion in assets. She is well recognized for her safety and soundness and risk management credentials. As superintendent, she introduced capital markets specialists to the examination teams, established targeted hedge fund reviews, opened a Tokyo office, and helped banks and securities firms comply with the Sarbanes-Oxley Act and the USA PATRIOT Act. In her early days as superintendent, Elizabeth directed a \$22 billion banker's bank, following its liquidity problems. After the 9/11 attacks, she worked with banks, securities firms, and the Federal Reserve to get the U.S. markets reopened and functioning properly. She subsequently worked with federal regulators and top law enforcement officials to create mechanisms to help guard against the use of the U.S. banking system for financial terrorism. Elizabeth served as the chairman of the Conference of State Bank Supervisors and as a member of the Federal Financial Institutions Examination Council. She was an instructor on corporate governance at the Financial Stability Institute at the Bank for International Settlements. She also worked as an investment banker at Goldman Sachs from 1985 to 1995. Elizabeth earned a Bachelor of Arts at Boston University and received a scholarship from the German government to the Common Market Program at the Institute of European Studies, University of Freiburg, Germany.

**DAVID MELANÇON** is a marketing leader and strategist known for visionary thinking, innovative ideas and results-oriented execution. He currently serves as Chief Marketing & Product Officer of JUST Capital, an innovative new enterprise which uses the power of the markets to drive positive change on the issues Americans care most about. In this role, Melançon is responsible for all brand-building, marketing and product development for the start-up social enterprise. He joined JUST when btr., the business intelligence venture he founded, was merged into the company.

Before this, Melançon served as EVP, Chief Marketing Officer for Benjamin Moore & Co., where he led all facets of brand-building for the iconic paint company, including product management, retail, color innovation, marketing, training & education, strategic alliances and corporate communications. His work – including the breakthrough “Main Street Matters” campaign – was named one

of the best community improvement efforts by the US Chamber of Commerce and Melançon was named an Adweek Brand Genius.

Before joining Benjamin Moore, Melançon was the founder and CEO of The Ito Partnership, a brand strategy and development firm based in NYC. Prior to launching Ito, Melançon was President of IPG's FutureBrand unit in North America, leading a four-office, 200-person operation as well as leading the agency's relationships with global clients including Microsoft, Coca-Cola, Intel and Unilever.

**MICHAEL O'LOUGHLIN** is a Chicago-based religion journalist and author of “The Tweetable Pope: A Spiritual Revolution in 140 Characters.” He was recently named the national correspondent for America Media. O'Loughlin writes regularly about contemporary religion issues, specializing in Catholicism, including religion and politics, Catholic young adults, the role of religion in the public square, and much more.

He has written for Crux, The Boston Globe, The Atlantic, The Washington Post, Foreign Policy, America, and the Advocate, and he has been interviewed by a number of media outlets, including NPR, The BBC, ABC, CBS, Fox News, and MSNBC. He frequently gives talks on a range of Catholic issues.

Originally from Massachusetts, Michael lives in Chicago and reports occasionally from Rome. He is a graduate of Saint Anselm College and Yale Divinity School, and he worked for Leadership Roundtable from 2009-2014.

**MEGAN O'NEIL** graduated from Stanford with a BA in Linguistics in 2013, and is currently pursuing her MBA and MA in Theology and Ministry at Boston College. She is originally from Idaho and hopes to make her way back to the West Coast after graduation. She is an avid runner and triathlete and is training for her third marathon.

**DOMINIC J. PERRI** has provided strategic planning, leadership development, and facilitation to over 100 organizations in more than 25 dioceses throughout the U.S. Dominic has worked with over 2000 priests across the country and serves as a consultant to the United States Conference of Catholic Bishops Committee on Communications, assisting with planning, research and facilitation.

Dominic serves the Program Manager for Catholic Leadership 360 and as faculty for the Hay Leadership Project at the School of Public Service at DePaul University and on the board of directors of the Organization Development Network of Chicago. He is also a dynamic presenter who has created and delivered leadership training programs across the U.S. He addresses topics including: managing people of different generations in the workplace, using social media to improve performance and

increasing collaboration and teamwork. He has presented at numerous national conferences and his articles have appeared in numerous publications, including U.S. Catholic and Human Development.

Dominic also has extensive experience in the field of survey research, developing and analyzing surveys and focus groups at two university research centers. He has worked as a researcher at both the Survey Research Center at the University of Maryland-College Park and the Center for Applied Research in the Apostolate (CARA) at Georgetown University.

**TOM RILEY** is vice president for planning at the Connelly Foundation, whose mission is to improve the quality of life in the Philadelphia area focusing on education and Catholic activities. Tom has a longstanding interest in the charitable world, serving on many nonprofit boards in the Philadelphia area, speaking to philanthropic groups, and serving as a contributing editor to Philanthropy magazine and previously as vice president for communications of the Philanthropy Roundtable.

From 2001 to 2009 Tom was associate director of the White House Office of National Drug Control Policy, where he was the principal spokesman for the federal government's substance abuse policies, and oversaw the federal government's largest marketing campaign.

Tom has undergraduate and graduate degrees from Georgetown University, and a law degree from Villanova. He lives in Radnor, PA with his wife Barbara and their five children.

**KERRY A. ROBINSON** is the executive director of Leadership Roundtable and is a member of the Raskob Foundation for Catholic Activities in Wilmington, Delaware and FADICA (Foundations and Donors Interested in Catholic Activities) in Washington, D.C.

Kerry has served as a trustee on the national boards of the Jesuit Volunteer Corps; 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 (CARA); the Center for the Study of Church Management at Villanova University; Busted Halo: Paulist Young Adult Ministries; America Magazine; Raskob Foundation for Catholic Activities; FADICA (Foundations and Donors Interested in Catholic Activities); and the National Pastoral Life Center. From 1995 to 2010 she served on the national committee for the U.S. Catholic Conference of Bishops' Catholic Campaign for Human Development. She currently serves on the Core Group of the Initiative of Catholic Social Thought and Public Life at Georgetown University; the Advisory Boards of the Get in Touch Foundation,

an international breast health advocacy organization, and Voices of Faith, a global platform in the heart of the Vatican to celebrate the contribution of women to the Church and world; and is a trustee of Saint Thomas More Catholic Chapel and Center at Yale University.

She is the prize winning author of *Imagining Abundance: Fundraising, Philanthropy and a Spiritual Call to Service* and is the founding editor of *The Catholic Funding Guide: A Directory of Resources for Catholic Activities* first published by FADICA in 1998 and soon to be in its 8th edition. She has been an advisor to grantmaking foundations, charitable nonprofits and family philanthropies since 1990.

Kerry served as the director of development for Saint Thomas More Catholic Chapel and Center at Yale University and led a successful \$75 million dollar fundraising drive to expand and endow the Chapel's intellectual and spiritual ministry and to construct a Catholic student center, designed by Cesar Pelli, on Yale's campus.

**REV. LARRY SNYDER** was president of Catholic Charities USA from 2005 until 2015. Since February 2015 he has served as the Vice President for Mission at the University of St. Thomas in Minnesota.

**MSGR. WILLIAM STUMPF** is the Vicar General and Moderator of the Curia for the Archdiocese of Indianapolis. He has a PhD in Pastoral Counseling from Loyola University in Maryland and was a member of the staff at St. Luke Institute, in Silver Spring, MD from 1991 to 1997. From 1997 to 2006 he served as the Vicar for Clergy for the Archdiocese of Indianapolis. Prior to being named Vicar General he had the opportunity to minister as pastor of two suburban parishes.



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Advancing Best Managerial and Leadership Practices*

June 29–30, 2016

Inn at Penn,  
Philadelphia, PA

[leadershiproundtable.org](http://leadershiproundtable.org)

## Participant List

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

**Geoffrey T. Boisi** is the chairman and CEO of Roundtable Investment Partners and is the founding chair of Leadership Roundtable.

**Patrick Brennan** is the CFO at the Diocese of Paterson in NJ.

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

**E. Jane Brown** is an investment associate & controller of the Drexel Fund.

**Brian Burkert**, CPA, is the CFO and executive director of finance and administration of the Archdiocese of Indianapolis.

**Frank Butler** is a representative of the Cushman Foundation.

**Dr. Mike Carotta** is senior manager of Catholic Initiatives at the American Bible Society.

**Dennis Cheesebrow** is founder and principal of PartnersEdge LLC and TeamWorks International, Inc.

**Barbara Anne Cusack** is chancellor for the Archdiocese of Milwaukee.

**Rick DeCarolis** is chief financial officer at the Healey Education Foundation.

**Peter Denio** is project manager for Leadership Roundtable.

**Katie Diller** is national coordinator for the ESTEEM Leadership Program.

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

**Most Rev. Thomas Dowd** is auxiliary bishop in the Archdiocese of Montreal.

**Lt. Gen. (Ret) Jim Dubik** is chairman of Leadership Roundtable.

**Most Rev. Felipe J. Estévez** is bishop of the Diocese of St. Augustine.

**Christina Ferguson** is operations manager for Leadership Roundtable.

**Dr. Geno Fernandez** is chief underwriting officer for Zurich Insurance, trustee of Leadership Roundtable and vice chair of the Archdiocese of Chicago School Board & Finance Council.

**Emily Filippi** is director for Christian formation in the Diocese of Richmond.

**Maureen Gallagher** is a partner with The Reid Group.

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

**Rev. Jeffrey Godecker** is coordinator of on-going formation for priests and formation director for deacon candidates for the Archdiocese of Indianapolis.

**Thomas J. Healey** is partner of Healey Development LLC and a trustee of Leadership Roundtable.

**Rev. Bryan Hehir** is the Montgomery Professor of the Practice of Religion and Public Life at Harvard University and a trustee of Leadership Roundtable.

**Jim Herrel** is parish administrator/CAO at Catholic Church of St. Ann.

**Rev. Paul A. Holmes** is Distinguished University Professor of Servant Leadership at Seton Hall University.

**Rev. John Hurley, CSP** is adjunct faculty at the Academy of Church Leadership, Santa Clara University.

**Rev. Mark J. Inglot** is pastor for the East Lansing Catholic Community.

**Rev. Jose Kulathinal** is pastor at St. Matthew Catholic Church in the Diocese of St. Augustine.

**Mary Lavin** is executive director of Advancement for the Archdiocese for the Military Services, USA.

**Paul A. Long** is president & CEO of the Michigan Catholic Conference.

**Jim Lundholm-Eades** is director of programs and services for Leadership Roundtable.

**Elizabeth McCaul** is partner-in-charge, NY Office for Promontory.

**Michael J. McGee** is CFO at the Catholic Diocese of Richmond.

**Katie McKenna** is associate director of development for Leadership Roundtable.

**David Melançon** is the chief marketing & product officer of JUST Capital.

**James Milway** is chancellor of temporal affairs for the Archdiocese of Toronto.

**Michael J. O'Loughlin** is author of *The Tweetable Pope: A Spiritual Revolution in 140 Characters*.

**Megan O'Neil** is an ESTEEM alumna, and is currently a student at Boston College pursuing her MBA and an MA in Theology and Ministry.

**Dominic Perri** is program manager of Catholic Leadership 360 and principal at Essential Conversations.

**Peter Persuitti** is managing director of Arthur J. Gallagher & Co.'s Global Religious Practice.

**Rev. John Phillips** is pastor of Holy Faith Catholic Church in the Diocese of St. Augustine.

**Rev. Dave Poecking** is pastor at St. Elizabeth Ann Seton Parish in the Diocese of Pittsburgh.

**Marcos Ramirez** is a consultant for the CSJ Educational Network, a ministry of the Sisters of Saint Joseph of Orange.

**Tom Riley** is vice president for strategy at the Connelly Foundation.

**Kerry Robinson** is executive director of Leadership Roundtable.

**Darla Romfo** is president of the Children's Scholarship Fund and a trustee of Leadership Roundtable.

**Rev. Larry Snyder** is vice president for mission at the University of St. Thomas in St. Paul, Minnesota.

**Tony Spence** is president of SIGNIS North America.

**Rev. Msgr. William Stumpf** is vicar general and moderator of the curia of the Archdiocese of Indianapolis.

**Keith J. Tharp** is director of administration and development for the East Lansing Catholic Community.

**Rev. Ross Tozzi** is vicar general for the Diocese of Fairbanks.

**Brian Walsh** is president and founder of Faith Direct.

**Carol Walters** is director of the Office for Lay Ecclesial Ministry for the Archdiocese of Chicago.

**Michael Witka** is director of risk management for the Archdiocese of Indianapolis.

**Rev. Mr. Michael Yakir** is chancellor for the Archdiocese for the Military Services in Washington, DC.

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## Leadership Roundtable Council Members

**Richard Abdo** is president of R.A.Abdo & Company, LLC.

**Joseph Amatore** is president of the Amatore Family Foundation.

**Robert Amen** is chairman and CEO of International Flavors and Fragrances, Inc.

**Harold Attridge** is Sterling Professor of Divinity and former dean of the Yale Divinity School.

**William Baker** is president emeritus of Thirteen WNET.

**Rev. John Beal, III** is professor in the School of Canon Law at the Catholic University of America and a former trustee of Leadership Roundtable.

**Rev. Robert Beloin** is the chaplain of Saint Thomas More Catholic Chapel and Center at Yale University.

**Robert Birdsell** is co-founder and managing partner at the Drexel Fund.

**Marilyn Blanchette** is president of L'Etoile Development.

**Betsy Bliss** is managing director for JP Morgan and a trustee of Leadership Roundtable.

**Geoffrey Boisi** is chairman and chief executive officer of Roundtable Investment Partners, LLC and founding chair of Leadership Roundtable.

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

**Kurt Borowsky** is chairman of Van Beuren Management.

**Mary Brabeck** is professor of applied psychology and dean emerita of the Steinhardt School of Culture, Education and Human Development at New York University, and a former trustee of Leadership Roundtable.

**Anthony Brenninkmeyer** is former CEO of American Retail Group, a trustee of FADICA, and a former trustee of Leadership Roundtable.

**Hans Brenninkmeyer** is trustee of Leadership Roundtable.

**E. Jane Brown** is an investment associate & controller of the Drexel Fund.

**Kathleen Buechel** is executive director of The Benter Foundation and senior lecturer at the University of Pittsburgh's Graduate School of Public and International Affairs.

**Anne Burke** is a justice on the Illinois Supreme Court.

**Richard Burke** is senior executive consultant at Catholic School Management, Inc.

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

**Francis Butler** is founder of Drexel Philanthropic Advisors, president emeritus of FADICA and a former trustee of Leadership Roundtable.

**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 PwC and a trustee of Leadership Roundtable.

**B.J. Cassin** is chairman and president of the Cassin Educational Initiative Foundation and a trustee of Leadership Roundtable.

**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** is chair and CEO of Clough Capital Partners.

**Michael D. Connelly, Jr.** is former president and CEO of Mercy Health in Cincinnati, OH.

**John M. Connors, Jr.** is founder and former CEO of Hill, Holiday, Connor, and Cosmopolos.

**Michael Cote** is CEO of Secure Works.

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

**Barbara Anne Cusack** is chancellor of the Archdiocese of Milwaukee.

**Rev. Anthony Cutcher** is president of the National Federation of Priests' Councils (NFPC).

**James Davidson, Jr.** is emeritus professor of sociology at Purdue University.

**John DeGioia** is president of Georgetown University.

**Daniel Denihan** is principal of Denihan Capital and a trustee of Leadership Roundtable.

**John Dilulio** is the Frederic Fox Leadership Professor of Politics, Religion, and Civil Society at the University of Pennsylvania.

**Rev. Edmund J. Dobbin** is president emeritus of Villanova University.

**Edward Dolejsi** is executive director of the California Conference of Catholic Bishops.

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

**Charles Dougherty** is former president of Duquesne University.

**James Dubik** is Lt. Gen. (Ret.), United States Army and chair of Leadership Roundtable.

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

**Cynthia Egan** is president of T. Rowe Price Retirement Plan Services.

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

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

**Marilou Eldred** is president of the Catholic Community Foundation.

**John Eriksen** is managing partner of the Drexel Fund.

**Sr. Sharon Euart, RSM**, is executive director of the Resource Center for Religious Institutes (RCRI).

**Geno Fernandez** is head of strategic execution at Zurich North America and a trustee of Leadership Roundtable.

**Joseph Finn** is founding partner of Finn, Warnke & Gayton.

**Peter Flynn** is counsel for Graham Pelton.

**Carol Fowler** is former director of the department of personnel services for the Archdiocese of Chicago and a former trustee of Leadership Roundtable.

**Zeni Fox** is professor of pastoral theology at Seton Hall University.

**Norman Francis** is former president of Xavier University of Louisiana and a former trustee of Leadership Roundtable.

**William Frank** is counsel for Skadden, Arps, Slate, Meagher & Flom LLP.

**Michael Galligan-Stierle** is president and CEO of the Association of Catholic Colleges and Universities.

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

**Robert Gasser** is a trustee of Leadership Roundtable.

**Charles Geschke** is chairman of the board of Adobe Systems, Inc. and a former trustee of Leadership Roundtable.

**Susan Gianinno** is chair, North America, of Publicus Worldwide.

**Frederick Gluck** is former managing director of McKinsey & Co., Inc. and a trustee of Leadership Roundtable.

**Sr. Doris Gottemoeller, RSM**, is a trustee of Catholic Health Partners.

**Sr. Katherine Gray, CSJ**, is director of mission integration and ongoing formation of Christ Cathedral in Oakland, CA.

**Thomas Groome** is professor of theology and religious studies at Boston College School of Theology and Ministry.

**Michael Guerra** is president emeritus of the National Catholic Education Association.

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

**Patrick Harker** is the current president of the Federal Reserve Bank of Philadelphia and former president of the University of Delaware.

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

**Thomas J. Healey** is partner at Healey Development and a trustee of Leadership Roundtable.

**Christine Healey** is executive director of the Healey Educational Foundation.

**Rev. J. Bryan Hehir** is Parker Gilbert Montgomery Professor of the Practice of Religion and Public Life at Harvard University, secretary for social services for the Archdiocese of Boston, and trustee of Leadership Roundtable.

**James Higgins** is senior advisor for Morgan Stanley.

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

**Lori Hricik** is a director for the Depository Trust and Clearing Corporation.

**Rev. John Hurley, CSP**, is a consultant for New Evangelization Strategies.

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

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

**Marti Jewell** is associate professor of pastoral theology at the University of Dallas Ann & Joe O. Neuhoff School of Ministry.

**Thomas Johnson** is former chairman and CEO of Greenpoint Financial Corp. and chairman of Institute of International Education.

**Sr. Mary Johnson, SND**, is distinguished professor of sociology and religious studies at Trinity Washington University.

**Br. Thomas Johnson, FSC**, is director of the Novitiate for the Lasallian Region of North America.

**Sr. Carol Keehan, DC**, is president and CEO of the Catholic Health Association and former trustee of Leadership Roundtable.

**Joseph Kelsch** is director of business development for International Capital Group, LLC.

**Victoria Kennedy** is trustee of Leadership Roundtable.

**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 trustee of Leadership Roundtable.

**Catherine Kinney** is former president and co-chief of operations of the New York Stock Exchange.

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

**James Lenehan** is a former executive with Johnson and Johnson.

**Rev. Paul Lininger, OFM Conv.**, is former executive director of the Conference of Major Superiors of Men and is currently pastor of Blessed Sacrament Catholic Community in Graham, NC.

**T. Michael Long** is partner at Brown Brothers and Harriman.

**Mary Lyons** is former president of the University of San Diego.

**Michael Madden** is managing partner at BlackEagle Partners, LLC.

**Rev. Msgr. James Mahoney** is Vicar General and Moderator of the Curia of the Diocese of Paterson.

**Kathleen Mahoney** is former president of Porticus North America.

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**Sr. Kathleen Turley** is a trustee of St. Peter's Health Partners Medical Associates.

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**Sr. Susan Wolf, SND**, is an internet and social media strategist at Catholic Web Solutions.

**Carolyn Woo** is president and CEO of Catholic Relief Services.

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Leadership Roundtable is an organization of laity, religious, and clergy working together to promote best practices and accountability in the management, finances, communications, and human resource development of the Catholic Church in the U.S. including greater incorporation of the expertise of the laity.

Leadership Roundtable serves the Church through its programs, collection of best practices, and consultancy services, each specifically tailored for archdioceses, dioceses, religious communities, parishes, Catholic schools, Catholic charities, and other Catholic organizations across the country. Leadership Roundtable offers solutions that are pragmatic, effective, affordable and consistent with canon law to contemporary, complex managerial challenges facing Church leaders.

Leadership Roundtable designs powerful integrated roadmaps for clients to move toward managerial excellence using local resources and drawing upon the expertise and experience of its vast national network. These pragmatic, transformative solutions are individually designed and assembled for specific Catholic dioceses, religious orders and other Catholic organizations and consist of the following features:

#### INTEGRATED SOLUTIONS

Integrated solutions designed by Leadership Roundtable pay attention to the interplay between what is uniquely Catholic in an organization's culture and structure, exemplary stewardship of resources, and the capacity of Catholic organizations to transform themselves using contemporary managerial practices.

#### CAPACITY BUILDING

All that Leadership Roundtable does in partnership with Catholic leaders aims at capacity building through a train-the-trainer and empowerment approach. Leadership Roundtable works to strengthen the capacity of dioceses, religious orders, and Catholic nonprofits to excel at their mission by inculcating best practices in temporal management, without dependency on Leadership Roundtable.

#### CATHOLIC STANDARDS FOR EXCELLENCE

Solutions offered by Leadership Roundtable will always be congruent with the Catholic Standards for Excellence, a set of 55 best practices in Church management for Catholic parishes, dioceses and other Catholic organizations, developed from the research and practice of the Standards for Excellence Institute and adapted for Catholic entities to be consistent with canon law and USCCB guidelines.

#### PROGRAMS AND RESOURCES

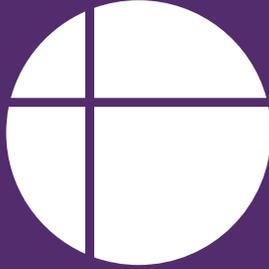
Leadership Roundtable assembles sets of resources and creates means for collaborative efforts so that Catholic organizations and their leaders do not have to 'reinvent the wheel.' To that end Catholic leaders considering partnering with Leadership Roundtable are encouraged to contact us to be connected with others who have already incorporated best practices into their temporal administration, leadership, and management.

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***Service. Excellence. Church Management.***

Best practices are most effectively implemented through dialogue with all the stakeholders involved. For more information on any Leadership Roundtable service or resource, or if you are interested in becoming a partner in our mission, please call (202) 635-5820 or email [info@leadershiproundtable.org](mailto:info@leadershiproundtable.org). Visit [CatholicStandardsForum.org](http://CatholicStandardsForum.org) to join in the conversation.





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