



# Resources & Recommendations for Creating a New Culture of Leadership

## Catholic Partnership Summit 2020 (*as of January 21*)

The Catholic Partnership Summit creates a space for Catholic leaders to address the most pressing Church leadership and management challenges and opportunities of our times. This year's theme is "From Crisis to Co-Responsibility: Creating a New Culture of Leadership." We will explore what aspects of the current leadership culture led to the twin crises of abuse and leadership failures, and imagine the future we want to create together. What does a thriving, co-responsible Church look like? And what is the leadership culture that we want to create to support that vision? Four topics that will be addressed to help renew our Church include:

- Envisioning a New Culture of Leadership
- A Culture of Co-Responsible Governance and Leadership
- A Culture of Ethical Financial Management and Stewardship
- A Culture with Young Adult Catholics at the Leadership Table

Each of these topics is listed below, along with links to resources and a list of actionable recommendations to help our Church create a new culture of leadership. These are drawn from a variety of sources and represent a sample of the best practices available to our Church today. While Leadership Roundtable does not necessarily endorse any of these specific recommendations, we offer them to aid the discussion at the Catholic Partnership Summit, as well as in your local faith communities.

Leadership Roundtable developed these guiding principles for any recommendations that are considered. These recommendations should:

1. impact the Catholic Church based on three principles: accountability, transparency, and co-responsibility,
2. impact the leadership and management culture of the Church, in line with Catholic beliefs, ecclesiology, and canon law,
3. restore trust in the Church based on measurable, visible outcomes,
4. engage both ordained and lay Catholics, working together for the mission,
5. lean forward into new possibilities,
6. be realistic and able to be translated into practical strategy and implementation.

## Session 1: Envisioning a New Culture of Leadership

### Description

The Catholic Church in the United States is suffering from a twin crises of abuse and leadership failures. In order to move out of the crises, it is important to understand how the current culture of leadership contributed to the problems we face today. What is the leadership culture that we want to create? What models will ensure this new culture embraces servant leadership, as well as accountability, transparency, and co-responsibility? Where is this new culture of leadership emerging and how might more Catholic institutions take steps towards this new culture?

### Values of the New Culture

The values of this new culture could include: servant leadership, commitment to excellence in temporal matters, care and service, discernment, inclusion, and welcome.

### Best Practices

#### [Address of the Holy Father to the Bishops of the United States, September 2015](#)

Pope Francis addresses the bishops of the United States and speaks to them “as a brother among brothers” about the role of a bishop as a shepherd who does not put himself at the center, but puts God’s family first. He goes on to speak about the need for bishops to use dialogue and promote unity. He recommends them to be “pastors who are neighbors and servants” and to welcome immigrants.

#### [Vatican’s International Theological Commission on Synodality, March 2018](#)

The Vatican’s International Theological Commission explores the notion of synodality which refers to “the involvement and participation of the whole People of God in the life and mission of the Church.” They examine its sources in scripture and tradition, as well as its theological foundations. It concludes with practical, pastoral approaches for making synodality happen “on all levels” to create “an authentic synodal experience of Church.”

#### [Address of His Excellency Archbishop Christophe Pierre to the U.S. Conference of Catholic Bishops, November 2019](#)

Archbishop Pierre begins with “words of encouragement”. He goes on to ask whether the pastoral priorities that have been chosen “truly touch the reality of the life of our people” or if they need to be realigned? Overall, he speaks to the need for bishops to advance communion: communion with the Holy Father, communion among bishops, communion among the presbyterate, and communion among the local Church where we can promote healing and restore trust.

#### [U.S. Conference of Catholic Bishops’ “Living as Missionary Disciples”, March 2017](#)

The bishops provide a theological summary of the new evangelization and provide suggestions for developing a pastoral plan for missionary discipleship. The resource is a concise roadmap for parishes and dioceses, including principles to be used in evangelization that includes a focus on planning, leadership development, management, stewardship, etc.

[“MacTaggart Lecture, St. Mary’s University by Bishop McElroy, “Rebuild My Church”, Synodality as a Way Forward, November 2019](#)

Bishop McElroy suggests that the church in the United States could move forward from this painful moment in its history by embracing a synodal pathway that could listen to the needs and concerns of all the church and communally discern a new path. He provides four characteristics or themes that could help the church renew itself: 1) a missionary church, 2) a co-responsible and participatory church, 3) a welcoming church, and 4) a church of harmony and dialogue.

[Leadership Roundtable’s Catholic Partnership Summit report, “Heal the Body of Christ: A plan to create a new culture of leadership and a new response to abuse in the Catholic Church”, February 2019](#)

Leadership Roundtable’s Summit focused on three primary issues: 1) Identifying the Root Causes of the Twin Crises of Abuse and Leadership Failures, 2) Creating a New Culture of Leadership, and 3) Creating a New Culture of Responding to Sexual Abuse. Participants, ranging from bishops and abuse survivors to theologians and philanthropists, provided recommendations to address these areas and are reflected in this report.

[Christina Lamas of the National Federation for Catholic Youth Ministry’s “Reflection for the U.S. Conference of Catholic Bishops”, November 2018](#)

Ms. Lamas identified seven needs of the laity in light of the abuse crisis. She said, “From you, our bishops, we need: 1) transparency and accountability, 2) more listening to the laity, 3) genuine care about the pastoral aspects of the church, 4) investment rooted in the love of people, 5) prophets of hope and engagement in respectful dialogue with one another and with the laity, 6) words of compassion when speaking about those disconnected from or hurt by the church, and 7) to address the root of the problem—the abuse of power.

[Chris Lowney, chair of Catholic Health Initiatives and former managing director of JP Morgan, wrote “Everyone Leads” \(sample of Chapter 1\), 2017](#)

Mr. Lowney urges the Church to develop a new culture of leadership that will empower Catholics, unleash their talent, foster creativity and prudent risk-taking, and settle for nothing less than the highest professional standards in managing our church. He offers an EASTeR strategy to revitalize the Church that includes a focus on being: 1) entrepreneurial, 2) accountable, 3) serve the world’s poor and marginalized peoples, 4) transform the hearts and souls of our members, and 5) reach out to and engage and welcome the wider world.

[Katarina Schuth, OSF’s “Seminary Formation”, 2016](#)

Katarina Schuth is the foremost scholar of Catholic seminaries in the United States. The book reviews thirty years of seminary history and provides recommendations and commentaries to improve the quality and effectiveness of the Catholic priesthood in the future.

## Session 2: A Culture of Co-Responsible Governance and Leadership

### Description

Governance structures are a key aspect of any leadership culture. How do we develop Catholic models of governance that reflect the diversity of the Church and are rooted in servant leadership, accountability, and transparency? How may selection, formation, and placement of leaders, both lay and ordained, reflect this new leadership culture? New governance models are emerging that reflect this new leadership culture and we will explore how Catholic institutions may advance in this direction.

### Values of New Culture

The values of this new culture could include: co-responsibility, diversity (people and perspectives), accountability, partnership and cooperation.

### Best Practices

#### [Vatican's New Transparency Practice Regarding Abuse](#)

The Vatican recently made significant changes in its transparency by abolishing the “pontifical secret” in abuse cases.

#### [Archdiocese of Louisville's Model of Co-Responsible Governance](#)

The Archdiocese of Louisville has a unique model of co-responsible governance between an archbishop and chancellor/chief administrative officer.

#### [Archdiocese of Newark's "Forward in Faith Together: Our Road Ahead"](#)

The Archdiocese created a pastoral plan to help Catholics (clergy and laity of the diocese) move forward in synodality with a 6-part focus on 1) protection of the faithful, 2) accountability, transparency, and communication, 3) archdiocesan pastoral planning, 4) lifelong faith formation and education, 5) ongoing formation/support of clergy, and 6) active engagement of the laity.

#### [Archdiocese of St. Paul and Minneapolis's Lay Advisory Board and Synod Process](#)

In an ongoing commitment to create a healthy archdiocese after its abuse crisis, the Archdiocese of St. Paul and Minneapolis has inaugurated a new lay advisory board and synod process to ensure ongoing lay involvement to help the archdiocese move forward.

#### [Diocese of Burlington's Synod Process](#)

The Diocese of Burlington put together a synod process involving every parish in the diocese with significant lay leadership.

#### [America's Article on the Importance of Formation with Lay and Ordained Leaders](#)

Stacey Noem, the director of human and spiritual formation for the Master of Divinity Program at the University of Notre Dame, writes about the importance of forming lay and ordained leaders together.

### [Leadership Roundtable's Catholic Leadership 360](#)

This program is the most customized leadership development program in the Catholic Church in the United States. It is a feedback assessment for priests and lay ministers that is designed around proven best practices for leadership development, performance improvement, and interpersonal communication.

### [Leadership Roundtable's Mission Management Model](#)

The Mission Management Model is a partnership between diocesan leaders and Leadership Roundtable to achieve management and leadership excellence by embedding best practices in the practice and culture of the diocese. The six stages of the Model include an assessment and customized plan to help you envision where you want your diocese to be and how to get there.

### [Leadership Roundtable's Restoring Trust](#)

A ten-point action plan for restoring trust in the face of the twin crises of abuse and leadership failures.

### [Notre Dame's Flourishing in Ministry Project](#)

This project focuses on the wellbeing of pastoral leaders through research and publications. They study the emerging trends of how clergy can live into their calling, feel a sense of fulfillment, and feel engaged in a very demanding environment.

### [U.S. Conference of Catholic Bishops' V Encuentro Formation Recommendations](#)

The U.S. Conference of Catholic Bishops led a process to address ministry among Hispanic/Latino Catholics in the United States. The process resulted in a series of recommendations, including on leadership formation, in their publication "Proceedings and Conclusions".

## **Recommendations**

### **Co-Responsible Governance**

- Commit to and invest in governance structures that are transparent with layered checks, balances, and oversight, and includes the expertise of the laity at the parish, diocesan, and national level
- Ensure co-responsibility of lay and ordained in Church leadership and management through hiring appropriate and competent diverse lay personnel at all levels
- Model co-responsible governance by convening priest and lay ecclesial convocations and utilize parish discernment processes to involve parishioner input in pastoral planning
- Welcome the contributions of women in leadership

### **Restoring Trust**

- Provide consistent, transparent, and coordinated communications at all levels and develop a proactive plan for restoring trust
- Encourage senior pastoral leaders to build trust and respect by setting up listening processes and making opportunities to be held publicly accountable

- Make the bishop selection process more transparent, utilizing a genuine discernment process that includes laity and clergy

### **Synodality**

- Put in place mechanisms for greater synodality among bishops, among bishops and priests, among clergy and laity
- Convene occasional synods in the diocese and invite all parishes in the dioceses to have listening sessions
- Choose delegates to ensure a broad voice from the diocese including: priest representatives from each deanery, deacon and religious representatives, lay members of the Diocesan Pastoral Council and parish delegates, theologians, representatives from diocesan offices, representatives of diverse racial and ethnic communities, etc.
- Measure the success of the synod by its implementation over the next 5-10 years

### **Formation of lay and ordained leaders**

- Develop and invest in ongoing formation programs and mentorship in management and leadership to train clergy, religious, and laity, including bishops
- Require best practices in human resources: effective selection, training, assignment, evaluation, compensation, and continuing education
- Explore different models of training and mentoring for new bishops
- Develop formation programs and processes based on common standards and curricular content in consultation with a diversity of ministerial leaders, theologians, etc.
- Develop intercultural competencies and an understanding of Hispanic culture and ministry among priests, deacons, seminarians, and lay ecclesial ministers
- Engage in a process of needs assessment so that new formation programs can be provided in settings, geographic locations, or languages that previously were not available, while ensuring that the lack of legal status is not an obstacle

### **Seminary Formation**

- Include in seminary formation a special emphasis on training for leadership, solid academics, spirituality, wide catholicity, reading the signs of the times, commitment to the poor, and servant leadership
- Utilize 360-degree assessments for bishops and all Catholic leaders that begin in seminaries and ministerial programs; assessments should be linked to appointments
- Ensure seminary curriculum addresses abuse prevention, improved human formation, personal integrity, and the experience of survivors
- Involve women in initial and ongoing clergy formation

## Session 3: A Culture of Ethical Financial Management and Stewardship

### Description

A healthy and ethical leadership culture promotes best practices in financial management, stewardship, and philanthropy. This includes everything from active finance councils and transparent donor communications to independent audits. We will look to examples of where these best practices are occurring and how Catholic institutions may integrate them system-wide.

### Values of New Culture

The values of this new culture could include: ethics, transparency, standards for excellence, integrity

### Best Practices

#### [U.S. Conference of Catholic Bishops “Stewardship: A Disciple’s Response, A Pastoral Letter on Stewardship”](#)

A pastoral letter from the U.S. bishops on stewardship that also includes a summary, resource manual, and stewardship resources.

#### [LPI’s summary “Stewardship: A Disciples’s Response in a Nutshell”](#)

A concise summary of best practices from the U.S. bishops’ pastoral letter on stewardship.

#### [Association of Fundraising Professionals’ “Code of Ethical Standards”](#)

The code that must be followed by fundraising professionals, including those who serve in the Church.

#### [Charles E. Zech’s “Best Practices in Parish Stewardship”](#)

Based on a survey of stewardship parishes across the country, this book provides a comprehensive analysis of both financial and non-financial stewardship activities and offers insights for one’s own parish.

#### [Diocesan Fiscal Management Conference’s “Diocesan Financial Management: A Guide to Best Practices”](#)

A comprehensive manual for dioceses and religious institutions to ensure they are operating by best practices.

#### [Lake Institute on Faith and Giving’s “National Study of Congregations’ Economic Practices”](#)

A study of U.S. congregations, including Catholic parishes, and their economic practices.

#### Leadership Roundtable’s “Catholic Standards for Excellence”, Best Church Management Practices for [Dioceses](#) and [Parishes](#)

A comprehensive listing of best practices for parishes and dioceses in areas such as management, advisory councils, finances, human resources, fundraising, and communications.

## [Michael J. Castrilli and Charles E. Zech's 'Parish Finances: Best Practices in Church Management'](#)

A guide for parishes to ensure they are operating with effective, accountable, and transparent financial processes.

## [Wilmington Trust's Catholic Foundation Trends](#)

A high-level overview of trends among Catholic foundations.

### **Recommendations**

#### **Ethical Financial Leadership**

- Implement sound financial and operational systems and ensure that accurate records are kept; Financial and nonfinancial resources must be used to further its religious purposes; Dioceses and parishes should conduct periodic reviews to address accuracy and transparency of financial and operational reporting, and safeguards to protect the integrity of the reporting systems
- Ensure dioceses and parishes have written financial policies, in line with diocesan policies, that are adequate for its size and complexity
- Conduct all fundraising on a foundation of truthfulness and responsible stewardship; Diocesan and parish financial stewardship policies should be consistent with the Church's mission, compatible with their capacity, respect of the interests and intentions of donors and potential donors, and in compliance with applicable canon law
- Ensure policies are in place to govern the acceptance and disposition of charitable gifts that are received in the course of regular fundraising activities
- Become familiar with resources for parishes and dioceses such as the Diocesan Financial Management's A Guide to Best Practices, the Association of Fundraising Professionals' Code of Ethical Standards, and Leadership Roundtable's Catholic Standards for Excellence, and review policies and practices each year for conformity with best practices

#### **Transparent Financial Leadership**

- Conduct annual diocesan audits by an independent Certified Public Accountant
- Prepare, and make available annually to the faithful and the public, information about the Church's mission and parish's vision, ministry program activities, sacramental data, Mass attendance, and basic financial data. Basic financial data should, at a minimum, include a summary statement of activities and a summary statement of financial position.
- Issue 990 forms, even when not required, in order to promote transparency

#### **Convening and Selecting Parish and Diocesan Finance Council Members**

- Convene an active finance council in every parish and diocese as required by canon law
- Identify a process for the finance council to select new members and ensure they reflect the diversity of the people in the community the diocese/parish serves
- Select individuals for the finance council who are personally committed to the mission of the Church and possess the specific skills for the role and to achieve the vision for the diocese/parish
- Implement term limits and limits on the number of consecutive terms for finance councils
- Ensure that finance councils have at least five members (who are unrelated) who meet as frequently as is needed, at a minimum four times a year



- Engage in coordinated succession planning and leadership development to ensure a thorough process for the recruitment and development of new council members

### **Orienting and Conducting Business in Parish and Diocesan Finance Councils**

- Provide an orientation and education for new finance council members on their role
- Establish management policies and procedures for the finance council, assure that adequate human and financial resources are available, and actively monitor the parish's allocation of resources to effectively and efficiently fulfill its vision
- Periodically review parish compensation structures in conformity with diocesan policies and Catholic Social Teaching regarding workers' rights to a just wage
- Create a conflict of interest policy and statement for the finance council
- Prepare financial statements to report the parish's financial condition and make decisions on programmatic matters to align resources to goals

### **Faithful Stewardship and Philanthropy**

- Help the culture shift by requiring Catholic organizations seeking funding to adhere to standards for excellence in management and leadership
- Develop an endowment plan as part of sustainable diocesan stewardship
- Appoint a stewardship council and include stewardship as a vital component of the parish plan and emphasize stewardship in all parish formation and education programs
- Communicate with parishioners on stewardship, provide the opportunity for lay witness presentations
- Encourage parishioners to make a commitment to the parish by pledging

## Session 4: A Culture with Young Adult Catholics at the Leadership Table

### Description

To ensure robust engagement of young Catholics, research shows that the Church leadership culture needs to address a perceived lack of credibility and authenticity. How do we create a Church culture that embraces the ideas and gifts of a diversity of young Catholics? We will hear from a panel of emerging Catholic leaders who will share their experiences and express their vision for a transformed and thriving Church.

### Values of New Culture

The values of this new culture could include: credibility, authenticity, engagement, diversity (of people and perspectives), and dialogue.

### Best Practices

[Vatican's Youth Synod Preparation Process & Resulting Document](#) & [Post-Synodal Exhortation](#)

The documents related to the Vatican's Youth Synod that includes ways forward for engaging youth and young adults in the Church.

### [V Encuentro's Process and Resources](#)

Information about the four year process on Hispanic/Latino ministry taken by the U.S. Conference of Catholic Bishops'. The initiative involved 142,000 people at the parish level, 144 diocesan gatherings, and a national gathering with 3,470 delegates, and resulted in recommendations across ten priority areas to advance the Church's ministry among Hispanics/Latinos in the U.S.

### [U.S. Conference of Catholic Bishops' Evangelization Committee's Video "Reaching Out to the Unaffiliated"](#)

Bishop Robert Barron's take on how to engage young adult Catholics. Click on the icon in the upper right corner of the video and find "Day 1 Afternoon Session".

### [Saint Mary's Press' "Going, Going, Gone: The Dynamics of Disaffiliation in Young Catholics, Research & Video](#)

A report and accompanying website of resources with the latest research on why young Catholics disaffiliate.

### [Catholic Campus Ministry Association's "Mastermind Groups"](#)

A cohort approach to help Catholic campus ministers with leadership development via group coaching.

### [Diocese of San Diego's Synod Process to Engage Young Adults](#)

An example of a diocesan synod process specifically aimed at listening to and responding to the needs of young adult Catholics.

### [Catholic Apostolate Center's "Art of Accompaniment"](#)

Theological and practical elements to accompaniment as an approach for ministry, including with young adult Catholics.

### [Young Catholic Professionals' Approach to Leadership Engagement](#)

An approach to engaging young adult Catholics in professional leadership development via local groups and mentoring.

### [ESTEEM's Approach to Leadership Engagement](#)

An approach to leadership development on college campuses that prepares young Catholics for leadership in parishes or dioceses after graduation.

## **Recommendations**

### **Inclusive, Participatory Leadership Culture**

- Dialogue with a diverse group of people about whom decisions are being made
- Highlight the value of listening
- Create a robust process by which to listen and solicit feedback in multiple formats such as in-person meetings, social media, surveys, etc.
- Be authentic, transparent, and ensure co-responsibility in pastoral ministry and decision-making
- Engage young people at the grassroots and ensure their voices are included and lifted up from the local to the regional to the national level
- Provide resources to engage feedback that are culturally appropriate and sensitive to diverse audiences
- Engage young adult Catholics not only in the pews, but also the unaffiliated using the works of justice, beauty, the intellectual tradition, missionary evangelization, and new media
- Create new ministries that engage young adult Catholics, from their creation to their delivery.

### **Leadership Development**

- Offer presentations and trainings in Catholic leadership development such as servant leadership, faithful and prudent stewardship, collaborative ministry, etc.
- Provide formal mentorship opportunities and accompaniment to equip young adult Catholics for leadership positions
- Create local peer support groups that meet on a regular basis
- Provide leadership development at Catholic colleges and Newman Centers.