OPENING PRAYER

Sr. Mary Johnson, SND
Professor of Sociology and Religious Studies, Emmanuel College

Loving God, we come to you today in prayer to ask for wisdom, strength, and courage as we face multiple challenges in our Church, in our country, and in our world. Bless, in a particular way, our deliberations here today and tomorrow. We seek to hear your word, to follow your truth, and to minister in your name to all who need your love and care, particularly your beloved poor. We ask this in the name of our brother and Lord, Jesus Christ. Amen.

INTRODUCTION TO THE ANNUAL MEETING

We have two purposes for gathering annually. The first is that we want to give a proper account of the services that we have developed and the programs that we have put in place to respond to the temporal challenges facing Church leaders in the United States. So it is our way of being accountable to our members and showing you how we are properly utilizing your intellectual contributions to our mission. Our second purpose is to highlight a particular opportunity or challenge facing the Church and to bring brilliant men and women—ordained, religious, and lay—together to explore those challenges and come up with effective responses to meet the temporal challenges that we have identified.

In the past, this gathering has taken up such matters as the financial and managerial considerations of organizing a diocese, a parish, or a Catholic nonprofit. We have focused on management, human resource development for the Church, and communications. Two years ago, we took up twin challenges at the time. We examined the ongoing sexual abuse crisis that Europe was experiencing, showcasing some of the fine work that has been done in this country to respond to it as a way of being helpful to our global Church. And we discussed the crisis of the global economic meltdown and how that impacts the health of the Church. Last year we were prevailed upon by bishops and our own members to take up the subject of parochial school systems, specifically to convene experts in the field of Catholic education to focus on the long-term sustainability and health of Catholic school systems, and that resulted in a series of recommendations that we have fine-tuned and are working on now; you will hear some more about that later this afternoon.

This year, of course, our topic is the importance of strategic alliances and partnerships. And the genesis of this, frankly, was the members of the Leadership Roundtable who represent Catholic philanthropic foundations and who are Catholic philanthropists themselves. Since Vatican II, in this country, a number of very prominent Catholic families have been supporting, financially, the creation of Catholic national networks whose own mission has a bearing on ours. They are important life-giving networks and apostolates to the life of the Church. How you navigate a changing world and allow yourself to be open to risk-taking and strategic alliances for the sake of your own financial sustainability was key in the formulation of our gathering today. And as you see, we have a stellar lineup of keynotes and a set of working sessions, which allows us to capitalize on the fact that any one of you is a keynote in his or her own right. And we will be working you very hard tomorrow for the sake of the common good of the Church.
And now I would like to turn to the first purpose of our meeting, which is a report and account of the work of the Leadership Roundtable. To help me do this, I have three extraordinary men with me, all personal heroes of mine.

The first is Fr. Paul Holmes, who is professor of moral and sacramental theology at Seton Hall University and was the first vice president for mission at the University. It has been a great privilege for the Leadership Roundtable to partner with Seton Hall University and specifically with Fr. Paul Holmes in creating the Toolbox for Pastoral Management, which is offered in a retreat-like setting for six days to new pastors. Bishops from all over the country are sending their priests to this wonderful opportunity.

Next to him is Geoff Boisi, the chairman and CEO of Roundtable Investment Partners, and most importantly, the founder of the National Leadership Roundtable on Church Management. His leadership, passion, and commitment to the Church, and specifically to the Leadership Roundtable, as a way to be part of the solution is inspiring, and we owe a profound debt of gratitude to him.

And next is B.J. Cassin, chairman and president of Cassin Educational Initiative Foundation. He was formally welcomed onto the board of trustees of the Leadership Roundtable today. He is also the chair of the board of the Cristo Rey Network.

2012 Leadership Roundtable Annual Report
The first thing that I would like to point out to you is, in your packets you have received, hot off the press, our 2012 Annual Report. Our communications manager, Mike O’Loughlin, is responsible for this. It reflects, particularly on the inside, our commitment to measuring the impact and reach, the breadth and depth, of our work on behalf of the Church. We are using this as a baseline, but in every subsequent quarter and year, we will add to this to document where our presence is having a positive impact. Right now we are present in 96 dioceses. We also work with religious orders, men’s and women’s, with national Catholic organizations, and, of course, hospitals, schools, universities, and charities. We take metrics very seriously, and while it’s not always easy to measure the impact that we are making, we are detailing, in a very deliberate way, where we have a presence. What I can assure you is that the demand for what we are offering the Church is growing, and it is our task as a board and as members to manage that in a way that does not sacrifice quality and allows us to be even more beneficial to the Church we love.

Catholic Standards for Excellence Online Forum
Our Catholic Standards for Excellence online forum is a free, interactive online chat room, essentially, and it also provides for the exchange of best practices in the temporal affairs of the Church. We are using the Forum over the course of these two days. In our breakout sessions, the scribes will be uploading some key insights onto the site. Over the coming days, weeks, and months, we will have an opportunity as participants to go back to the Forum to refine some of the practices, ideas, and suggestions that are offered over the next two days.

As you know, our mission is to promote excellence and best practices in the management, finances, human resource development, and communications of the Catholic Church in the US, with a particular focus on greater incorporation of the expertise of the laity. You have heard me, many times, note that the Catholic laity have risen to levels of affluence and influence, and count among the highest echelons of leadership across every sector and industry in the United States. We would be failing in our basic Christian stewardship if we were not, as a Church, to avail ourselves of that talent and expertise. This is why, ladies and gentlemen, you have been invited here today, and I am so grateful to you.
“As you know, our mission is to promote excellence in best practices, in the management, finances, human resource development, and communications of the Catholic Church in the US, with a particular focus on greater incorporation of the expertise of the laity.”

The Four Columns of Leadership Roundtable Growth

In March of this year, anticipating our seventh anniversary on July 11th, next month, we took stock of all that the Leadership Roundtable, with your support, has created to respond to temporal challenges facing the Church. And we took a deep breath and marveled at what we had, in fact, created. Then we acknowledged that the Leadership Roundtable is no longer an experiment, but is, in fact, a very important resource in service to the Church, particularly because of its laser focus on temporal challenges. It avoids the neuralgic issues that tend to divide and separate Catholics, and we harness what we do best, which is to strengthen the management, finance, and human resource development of the Church. And with the confidence that we were on to a great thing and had something wonderful to continue to offer the Church, we unveiled our vision for the next few years, and that includes strengthening our offering in four areas, which my fellow panelists will be addressing.

1. The first column is what we have always done; namely, to develop specific solutions to the challenges that keep Church leaders up at night. This column includes all of our signature services and programs.

2. The second column is a focus on identifying the top 50 families, foundations, and individuals who are committed in a very serious philanthropic way to supporting the Catholic Church. We want to identify these 50 by region. There’s increasing demand, so we need resources in order to disseminate our programs properly across the country. We recognize that there is something profoundly important about the intersection of Catholic financial capital and Catholic intellectual capital, and when you bring those two together, you create a lay force to be reckoned with that is profoundly faithful and profoundly effective. We don’t just want to identify these top 50 families and individuals to support the Leadership Roundtable, though, because we know that with their experience of philanthropy comes a great experience and bird’s eye views of some of the important needs facing the Church.

3. The third column is the Leadership Roundtable schools initiative. B.J. will be addressing that later this afternoon to update you on how the Leadership Roundtable can take its particular area of expertise and lend that in service to the challenge that all Church leaders are facing with respect to the long-term sustainability and health of Catholic parochial school systems.

4. And the fourth column is an investment initiative that Geoff Boisi will explain. The idea came out of a conversation in 2008 at the start of the economic crisis from a conversation that Geoff and I had with Cardinal George, who was then the president of the US Bishop’s Conference. Cardinal George asked the Leadership Roundtable specifically for assistance in helping bishops safeguard and strengthen Church assets in an uncertain economic period. One of five suggestions that we have developed for the bishops and other Church leaders to consider is the idea of strategic investing.

Toolbox for Pastoral Management

Rev. Paul Holmes, STD
Distinguished University Professor of Servant Leadership,
Seton Hall University Program Coordinator,
The Toolbox for Pastoral Management

This is my first time at a Leadership Roundtable Annual Meeting. I’ve been working with the Leadership Roundtable for three years and I’m very, very excited to be with you. I have an announcement that I should make before I begin. I am the happiest priest you will ever meet. I know there are my brother priests in
the audience, but I’m sorry. This position is taken, and it is mine. Why am I the happiest priest you’ll ever want to meet? Well, I only have 10 minutes, so I can’t tell you everything. What I can tell you is this: there are few things as rewarding as working on a project harder than you’ve worked on anything and having it turn out to be a magnificent way to help one’s brother priests. The Toolbox for Pastoral Management is that for me.

We bring in 15 experts and invite 30 priests for a week in a retreat-like setting. There’s morning prayer, evening prayer, and the celebration of the Eucharist. We have adoration of the Blessed Sacrament and confessions. But in the midst of all of that, the priests participate in 15 presentations, which are very, very interactive. We bring these experts in from all over the country on subjects as varied as internal financial controls, risk management, working with your parish business office, a mission-driven parish, Christian stewardship, human resources 101, building councils, a six-month game plan for a new pastor, Standards for Excellence, creating an evangelizing parish, and a theology of management. These 30 priests, who have just been named pastor, are as nervous about that new identity as you can imagine. At the end of this week, they feel much more comfortable.

This is what happened. Back in 2006, Tom Healey, the treasurer of the Leadership Roundtable, visited Seton Hall and asked our president, “Can Seton Hall create an executive education experience for new Catholic pastors and give them the administrative skills that they aren’t taught in seminary but skills they’ll need to be successful pastoral leaders in the 21st century?” We said yes, and I worked with Tom Healey, and with the Leadership Roundtable’s John Eriksen, Michael Brough, Jim Lundholm-Eades, Kerry Robinson, and other dedicated members.

Since Tom Healey’s first meeting at Seton Hall six years ago, we have edited the 15 Toolbox presentations and submitted them to a publisher so that there might one day be an easy-to-read how-to manual for new pastors. We wrote a proposal to Lilly Endowment, Inc., who so loved it that they provided a very generous grant that has allowed us to do two Toolboxes a year and to take the Toolbox on the road. We meet not just at the Jersey Shore, but are able to bring the Toolbox to various places in the country. Our first such non-New Jersey toolbox was held last January in Jacksonville, FL. Bishop Estevez and

“CatholicPastor.org allows the learning that takes place at the Toolbox to continue and turn into lifelong learning.”
We also observed that if we could start to pool the resources of some of the major philanthropic leaders of our country who were devoted to Catholic activities, we could maximize impact and effectiveness of the programs that we all support.

CatholicPhilanthropic Leadership Consortium

Geoffrey Boisi
Chair and CEO, Roundtable Investment Partners, LLC
Chair, National Leadership Roundtable on Church Management

Let me offer a couple of thoughts on the Catholic Philanthropic Leadership Consortium. My 93-year-old father, a devout Catholic, lawyer, businessman, taught me years ago the two definitions of the golden rule. The first he said, is to love thy neighbor as yourself. The second, he said, he who has the gold rules.

Those of us who have been active in philanthropy have observed over the last number of years that there has been a disconnect between the strategy and vision of the providers of capital and the users of capital. We observe the same thing in the Catholic community. And we thought that a smart thing for us to do would be to bring a group of philanthropic leaders together for the purpose of coordination and synchronization, and exposing their strategic vision as to what was important to the Catholic Church in the United States.
ultimately get to 100 families—and to have representation in each of the 15 regions around the country.

By developing this sort of strategic think-tank, we will develop greater communication between the philanthropists and then the program developers. And that, essentially, is the concept behind the Consortium. But it will also ingrain the notion of investment, not just giving, but investment into the strategic initiatives that we believe can move the dial for the Church’s mission in the US. We have started to reach out and have received very, very positive reaction from some of the major families in the country already, and we’re looking forward to our first meeting in September.

**Catholic Schools Initiative**

**B.J. Cassin**
President, Cassin Educational Initiative Foundation
Trustee, National Leadership Roundtable on Church Management

As Kerry indicated, some bishops asked the Leadership Roundtable to convene a meeting relative to Catholic schools. And those of you who attended last year, From Aspirations to Action: Solutions for the economic crisis. Forty percent of parish leaders report that the current financial health of their parish is tight, but barely manageable. And that’s up from 9 percent only 5 years ago.

In general, churches in the United States saw their contributions drop by $1.2 billion in 2010, up from a drop of $431 million in 2009. So you can see the increase in the financial stress. Eighty-five percent of nonprofits in the US saw an increase in demand for their services in 2011, and 57 percent of nonprofits have three months or less cash on hand. And if that’s not enough, total membership in the 25 largest churches has decreased. The Catholic Church, even though we’ve had tremendous buoyancy from the Latino community, still as a Church, membership has dropped over half of a percent, and that’s a big number when you consider 65 million people.

As a result of that, over the last two years we’ve been working very hard with a couple of other organizations to put together an organized investment partnership. What we’re trying to do is accomplish a little bit what the Carnegie Foundation, Yale University, Harvard, and some of the other major institutions have done in pooling together capital.

This happens to be the 100th anniversary of Andrew Carnegie taking $100 million in 1911 and investing it. For the first 75 years, all they did was put that in bonds. They lost purchasing power during that period of time. In the early 1970s, they started to go to a 60 percent/40 percent weighting of stocks to bonds. And they got it up to $187 million in the early 1980s.

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America’s Catholic Schools, it was a very lively group of discussions that we had, out of which came 92 aspirations. It’s taken some time putting together some stakeholders to boil those down to what is realistic and what is the most effective way that the Leadership Roundtable, with its resources, would be able to implement. So it went from 92 down to 20, then down to 8 that were presented to the Leadership Roundtable board in March, which they approved. We’re in the process now of actually pulling together business plans on 6 of those, getting the proper staff in place and the proper financial resources so these can, in fact, become actions. John Eriksen will rejoin the Leadership Roundtable this summer, and he will be leading this effort from the staff standpoint.

**Pooled Strategic Investment**

**Geoffrey Boisi**

In terms of the investment partnership that we’ve been developing, the average US household saw that its net worth fell approximately 40 percent from 2007 to 2010. Three out of 5 parishes report that their parish income declined as a result of the economic crisis. Forty percent of parish leaders report that the current financial health of their parish is tight, but barely manageable. And that’s up from 9 percent only 5 years ago.

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“Our objectives were to develop a program that would assist the financial stability of the Catholic Church; to successfully execute its mission through more professional, sophisticated, productive management of its capital base on a national basis; and create a world-class investment management partnership among Catholic affinity groups and individuals with consistent top-tier performance that commands the respect of all.”

managers around the world. They grew that $187 million to close to $2.7 billion today, after investing an additional $2.6 billion over that period of time in grants. And that, basically, was by compounding, leaving the capital in and compounding it by approximately 10 percent a year over that 25- to 30-year period of time.

We thought that this approach would be particularly attractive for the Catholic community, as it has been for Episcopalians, Lutherans, and some Jewish communities. We’ve been working with a few other organizations to identify a program that could achieve similar results to these major institutions for the Catholic Church. If we could perform anywhere near like those organizations, the Church would be utilizing its capital at 500 to 600 basis points annually better than that 60/40 kind of allocation.

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We would accomplish this through the utilization of a more nuanced approach to Catholic socially responsible investment principles, providing a spectrum of socially responsible investment principles for all the organizations given their level of discipline that they want to apply to SRI investment; develop a brand recognition for excellence and trust through the attraction and development of the highest quality talent; and utilization of the most sophisticated investment solutions that are responsive to client needs and offered on a cost-effective basis.

By pooling capital together, we can get performance up and costs down, and then become the investment option of choice for the Catholic market.

We’re very hopeful that, within the next couple of months, we’ll be coming forth to the market with a significant amount of capital to achieve this goal. And we think it can make a major contribution to the Church in the US.
**SELECTED QUESTIONS, ANSWERS, AND INSIGHTS**

**Pooled Investment Strategy**

Patrick Carolan  
*Executive Director*  
*Franciscan Action Network*

My organization does a lot of work on social justice issues, such as immigration reform. We discovered there is a lot of money that’s invested by faith-based organizations in private prisons. So I’m wondering, how are you going to balance a good return on the money with the concerns of the Church? Have you reached out to people like Sr. Nora Nash or Fr. Michael Crosby who have done a tremendous amount of work in this area of social investing and investing based on Catholic social teachings?

Geoffrey Boisi

This is a very important issue and one we’re addressing with Christian Brothers Investment Services, who have been a leader in the area of socially responsible investing, and we’ve also reached out to other institutions, Catholic institutions, and, frankly, there are some that are extremely interested and disciplined in their SRI investing. What we want to do in developing this is to create a menu of options for people. Anything that goes into a pooled vehicle will be scrutinized and we’ve been working with a variety of organizations to make sure that we are scrupulous to avoid the kinds of things that you were talking about. One of the reasons why we want to work with the Christian Brothers is the work that they’ve done in this area. But there are other Catholic institutions that have a different perspective and we think that there needs to be a spectrum of options for everybody within the community.

Fred Fosnacht  
*Founder*  
*My Catholic Voice*

Have you determined the criteria for participation?

Joan Neal  
*Vice President of Institutional Planning and Effectiveness, Cabrini College*

Is there a list of the investment advisors and managers, and could you talk a little bit about the screen that you apply to the selection of these managers?

Geoffrey Boisi

We’re in the midst of developing all of this. As you can tell, it’s a very complex formulation to put this together, to make it work. We’ve been interviewing a number of different screening organizations to look at the different issues that are Catholic related to make sure that we are not investing in anything that is inappropriate. We’ve been working with Christian Brothers at one end of the spectrum, and, as we go down that path, there is what I would call a slightly more nuanced approach to it, where if any organization has less than 3 percent of revenues or if 3 percent of the overall portfolio was in something that might be potentially neuralgic, it would get kicked out. We’ve developed multiple screens that would be utilized several times each year to ensure that there is a scrupulous approach to making sure any inappropriate investment was discontinued.

Geoffrey Boisi

The hope is to create a situation where at the parish level, at the Catholic nonprofit organization level, and the diocesan level,
that you can have as little as $250,000 to $1 million of participation. You would control those assets, but they would be pooled with other capital of larger organizations. You know, there is some capital that could be invested over a long period of time, and that would have private equity transactions, alternative investments, and that sort of thing, but it would have to stay in that pool for at least a three-year period of time. There will be another pool of capital that would provide either monthly or quarterly liquidity. There will be another pool of capital that has even shorter-term liquidity. And we’re also hoping to have a set of capabilities that could be done by asset class as well.

We’re working through this with the accountants and the lawyers now to create these pools so that we can make sure that everybody receives the correct proportion of return on their investments but with the benefits of being part of a large pool, giving them access to managers who serve institutions such as Harvard, Yale, and the Carnegie Corporation. We hope that the entry level is a modest amount of capital, so that an individual parish that wants to invest $1 million, that would never have the opportunity to invest with the kind of money managers that Notre Dame, Boston College, Georgetown, or Harvard and Yale retain, would now have that access.

**Mid-Atlantic Congress**

Rev. John Hurley, CSP  
Executive Director  
Department of Evangelization  
Archdiocese of Baltimore

I want to thank the Leadership Roundtable trustees. Paul Henderson and I both serve as co-chairs for the Mid-Atlantic Congress, and it was a tremendous success last year. It is sponsored by the Association of Catholic Publishers and the Archdiocese of Baltimore. We drew people last year from 65 dioceses and over 1,400 participants for the first time. We had a very positive experience with the Leadership Roundtable.

So as we look at next year, Michael Brough has been excellent in being a part of our planning committee to have a diocesan leader track and a parish track. Archbishop Lori responded to Kerry’s invitation about having a bishops-only possibility at the conference as well, so I want to thank the Leadership Roundtable for its efforts. I think we’re looking at this as Catholic leaders coming together and how we can celebrate and recognize the best practices among us. And I think you’ve been a key part of that. So, on behalf of the Association of Catholic Publishers and the Archdiocese of Baltimore, thank you.

**Toolbox for Pastoral Management**

James Donahue  
President  
Graduate Theological Union

Has there been any consideration about incorporating aspects of the Toolbox for Pastoral Management into seminary training?

Fr. Paul Holmes

We’ve had many discussions about this. I was on the faculty of the North American College in Rome in 2000, teaching young men how to preach. My archbishop would only release me for a year, so at the end of that year, it is the practice at the college to have the entire faculty and staff meet for an entire week, and invite the new faculty and administrative members who are going to be joining them in September to fly out to Rome for this meeting. The rector, who was Msgr. Timothy Dolan at the time, said, “Paul, you’re here and you’re leaving, so you can say anything you want, and you don’t have to worry about how we’re going to react to it. Is there something that we don’t do that we should be doing?” I said, “You know, we send men home to be pastors, and they don’t know how to hire, fire; they don’t know how to do any of the things that they need to be effective pastoral leaders and to bring the people to Christ. So I told that to Msgr. Dolan.

When I was ordained 31 years ago, I was told, in Newark, that I wouldn’t be a pastor for 27 years. Men are becoming pastors the day after their ordination today. So, while I would have had three pastors, at least, as an apprenticeship before becoming a pastor back then, new pastors today, whatever their age, are walking into parishes with no training whatsoever in the very skills that they need to be effective pastoral leaders and to bring the people to Christ. So I told that to Msgr. Dolan.

We have the largest seminary in the US at Seton Hall, and I’ve spoken to the rector there. The difficulty, at least with Catholic seminaries, is that there is a very
I want to encourage you to push back and try to get that into the seminary curriculum. I was named a pastor of a parish in Chicago two weeks after I was ordained in 1993, and I had to learn everything on the fly. I think there are places in the curriculum in the seminary program, even if you’re following the program for priestly formation, to include these things. Where there’s a will, there’s a way. I think we have to find a way, because I think we really harm a lot of young priests and discourage them by not teaching these skills. When you look at a lot of the data that’s coming out of CARA and places like that, it shows how many priests leave within the first 5 years of ordination. A large part of it is because they’re thrown into these situations where they’re overwhelmed with administrative tasks. Even the old guys in our province who have been pastors multiple times, they will say 5 masses a day until they die, but they never want to be administrators again. They say, “That’s not why I was ordained.” But some of us don’t have a choice. If you’re in a parish that has a small budget, you can’t hire all these people to do your work, so you got to find a way to do it.

During their pastoral education where seminarians discuss temporal administration of a parish. And this is the first time I’ve seen any notice of it. It’s sitting on my coffee table. I plan on writing a note to the rector and saying, “Good for you.” It’s important for them.

Geoffrey Boisi

Probably, though, the real answer is that we ought to be identifying lay people who are actually trained and qualified to do that kind of work and give the priests enough background so they can communicate, but the lay professional should be exercising more responsibility in this area.

Fr. Paul Holmes

One of the things we train these new pastors in is, “You are not the messiah. You can’t do all of this. You are going to have to rely on your brothers and sisters in Christ to do their work in building up the Church and helping you manage your parish.”
I think the resistance comes not just from the program for priestly formation but also from students, faculty, and staff. The students will say this is the last thing they’re interested in when they’re in seminary, but when they’re out two years they say, “I was not well-prepared.” These ideas always need a champion in the system, and if there’s some way to get faculty involved in things like this, to appreciate the value of it, you’d have an internal champion who might help to make it happen.

**Sustainability of Catholic Schools**

Rev. Mr. John Kerrigan  
**CFO, Santa Clara University**  
**Deacon, Catholic Community at Stanford University**

Are there programs here in the US, whether they’re private-to-private, or private-to-public, or outright public programs, that really excite you and have the potential to be models and drivers for improving the chances of the survivability of Catholic schools, whether broadly or particularly in the inner city?

**B.J. Cassin**  
No matter who gets elected as president, tax reform will undoubtedly be something that’s on the table, and doing the appropriate lobbying to get support of tax credits will be essential. My own personal experience, the Jesuit Nativity School here in Washington, DC, receives about $800,000 from vouchers. The Cleveland Cristo Rey High School and the Tucson Cristo Rey High School, to name two, receive $900,000 to $1 million from the tax credits that the students are able to bring in. So it’s a significant needle mover.

**Training**

Training is another area where there is need. There are superintendents of schools at various archdioceses who are there for two years, three years, or four years. And there is a need for comprehensive training programs for them, perhaps similar to the Toolbox for Pastoral Management.