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

National Leadership Roundtable on Church Management
Annual Conference at The Wharton School

June 25–27, 2008
Philadelphia, Pennsylvania
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It is a pleasure and a privilege to welcome you to the annual meeting of the National Leadership Roundtable on Church Management. We have a tremendous, very packed day and a half ahead of us, which aims to engage you in a fully participatory manner. I look forward to these deliberations, your creative insight, and your strategic counsel above all.

Every day, I wake up mindful of how blessed our Church is. You, your leadership, your expertise, and your generosity collectively bring forth so many blessings for the Church. I have never doubted that with sound intentions, exemplary competence, collaboration, and prayerful determination, we can continue to contribute to and bless the Church, allowing her mission to advance unencumbered, free to be an instrument in turn to bless and meet the world’s own profound human needs. As a staff, as a board, and as a membership, conscientiously we attend to modeling what we advocate. And so this morning we begin our deliberations on behalf of the Church the way we begin all of our efforts and endeavors, and that is in prayer.

Let us put ourselves in the presence of God with open hearts and minds, asking that God’s desire and intention, imagination, and magnanimity be that which informs, inspires, guides, and grounds all that we do here today, and over the course of the coming year. To lead us in prayer, I welcome Bishop William Friend, Bishop Emeritus of the Diocese of Shreveport, who has surely heard by now thousands of times how aptly named he is.

A friend to the Leadership Roundtable you have certainly been from the moment of its inception. As a good friend, your guidance, affirmation, and advocacy have been a great blessing to this important endeavor.
Let us pray in the name of the Father, and of the Son, and of the Holy Spirit. We praise and thank you for the gift of this new day, and your many other blessings. We thank you for calling us to this assembly, which meets for the good of the Church.

Guide us that we may know better how to serve you, serve Catholics in the United States, and the Church universal, and all of its leaders.

Help us to be servant leaders, as was your beloved son, Jesus. In him, power and authority are united once and for all, never to be repeated. Commission and office are found in his person.

Our Lord, Jesus, has shown us the way to serve. He shared his mission with the twelve disciples, and he calls us to be his witnesses and agents in our time. We come to learn more about how to serve in a positive manner, with love, and with faith, hope, unity, and with a passion. We pray that your divine guidance leads us in the mission of Jesus: to live and offer the good news of the Gospel, to help in the formation of a communion in the Holy Spirit, and to serve in the way of Christ. May your Holy Spirit enlighten us, that as leaders, we may hope to liberate people to do what is required of them in the most effective and humane way possible.

Let us help prepare those who are to come after us in leadership, laying the groundwork for the future. Bless all who have planned, organized, and funded the cost of this assembly. Bless everyone who will share their wisdom and talent these days. And bless the Leadership Roundtable.

Amen.
Opening Remarks

Ms. Kerry A. Robinson, Executive Director, National Leadership Roundtable on Church Management

On July 11th 2008, this organization of remarkably dedicated laity and clergy will be officially three years old. In three years, so many of our original objectives have been accomplished and advanced. An enormous amount has been achieved in a short time and often against obstacles that smart, sophisticated, experienced people told us would be barriers to our good intentions.

Obstacles such as fear of change, suspicion of motivations or results, inertia, and—above all—the sheer magnitude of very real contemporary challenges fiscally, demographically, and managerially facing the Catholic Church in the United States at the beginning of the 21st Century. So, how to account for so much good news to be able to share with you in our first three years of endeavor? The most obvious answer is grace. This is, after all, an organization of people who are faith-filled, devoted Catholics who are grateful for our faith, grateful to the Church for informing so much of who we are professionally and personally. Although we go in with our eyes wide open to the problems at hand, let us remember that it is the Church’s mission to which we are committed.

What better instrument to point us to the transcendent nature of life, to bring us into close relationship with Christ, to offer truth and meaning, and to provide a vehicle for carrying out the social mandate to care for others in our midst than the one, holy, catholic, apostolic Church to which we belong?

The consequence of succeeding and providing exceptional education to generations of Catholics in the United States is that you have before you an extremely well educated, talented, proficient laity, who know enough about our baptismal rights and responsibilities to know that when our Church—our faith community—needs our active participation and our particular competencies, it is our obligation and also our joy to extend them. Another way to account for the success is that our mission is simple, urgent, and compelling. It makes sense. It makes sense theologically and practically.

Catholics have risen to levels of affluence and influence, and can be counted among the highest echelons of leadership across industry and sector. The good news is that many of these talented men and women, ordained and lay, care so much about the Church and her mission that they are committing through the Roundtable their time, expertise, social capital, creativity, and many other resources in service to strengthening the management of human and financial resources.
As you know, we meet annually. There are at least two main purposes for this gathering. The first is to take up an aspect of our mission, whether it be Church finances, human resource development, communications, or management, and highlight it thematically for discussion, debate, and creative problem solving. As you are aware, our deliberations are transcribed, edited, and disseminated widely to other Church leaders. We make available all that we produce and do to a wide Church audience through our online clearing house of best practices, churchEpedia, which you will hear more about later in the day.

The second purpose of our gathering is to report to the membership on our activity and programmatic endeavors. This is surely intended to inform and inspire. But above all, we offer it because we eagerly seek your strategic guidance and reaction to the quality of our work. We need your help to ensure that it is disseminated and implemented effectively, and that we are on target in terms of identifying and meeting the most pressing temporal needs of the Church.

To begin our deliberations and to highlight the thematic message of the day and the half, we could find no more capable presenter than our own Fred Gluck. Former managing director of McKinsey and Company, Fred has served on our Board from the very beginning, and is setting the tone for the thematic portion of our gathering. He will offer a mini-keynote on leadership and management, the distinction between them, and the importance of both.
Leadership and Management: Distinction and Relevance

Keynote Address

Mr. Fred Gluck, Former Managing Director, McKinsey & Co.

THINKING ABOUT PROFESSIONAL MANAGEMENT IN THE CONTEXT OF THE CHURCH

A number of Church leaders (bishops and pastors) have raised questions about the perspective of the Leadership Roundtable on how they should think about their roles and responsibilities in managing their parishes and dioceses. They are particularly concerned with how their temporal responsibilities can be balanced with their pastoral duties and spiritual life, and with the priestly vocations they have chosen.

The following sections attempt to shed light on the issues raised by these questions by considering the role of the bishop (and, by analogy, the role of the pastor) in terms of leadership and management.

Leadership and Management

Both good leadership and good management are essential to the long-term success of any enterprise. Effective leadership is necessary to sustain focus on the mission of the organization in the face of environmental changes and to inspire and motivate people and maintain their trust, confidence, and commitment. Effective management is necessary to ensure that the necessary resources to achieve the mission are effectively utilized and to sustain the trust and commitment of the people who supply them. This is as true of the Church as it is of any commercial enterprise.

These terms are imprecise in some ways, but Figure 1 illustrates certain important features of each.
As indicated in the figure, the key concerns of leaders tend to be about the “big picture”: thinking about how the environment is changing, about how to change and adapt to it, and about shaping an appropriate strategy. Leaders also define the mission and values of the organization and shape the culture. Managers are primarily concerned with operations’ effectiveness and efficiency, and with setting specific objectives for the units that report to them.

Leaders shape the overall priorities for the enterprise and work with managers to translate them into principles for action (and eventually into specific objectives for operating units). Both man-

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1 Mission and values in the religious sense are timeless for Catholic leaders, but cultures adapt to changes in the human condition and are not necessarily identical in all geographic regions at all times.
agers and leaders work through people, but leaders tend to be more concerned with inspiration, motivation, trust, and confidence, while managers need to continually deal with more workaday problems, such as hiring and firing, quality control, skill levels, deployment, and performance measurement. However, there is always a management component to a leader’s job and a leadership component to a manager’s job.

Leaders need to decide how to deploy their resources in accordance with their priorities. Managers manage those resources on a day-to-day basis.

Leadership and management are completely complementary functions and need to be closely integrated and carried out in a holistic way. This happens naturally when a single person carries out the roles of leadership and management. In most organizations of any size, however, the chief executive officer (CEO) provides the overall leadership and delegates most of the managerial tasks and their concomitant leadership roles. The key challenge for the CEO then becomes obtaining the necessary information and understanding to provide the necessary leadership and maintain effective control of (manage) the organization. The bishop’s ability to acquire the necessary information and understanding depends importantly on developing a cohesive team that is energized by mutual trust, respect, and confidence. His key lever for exercising control is to agree on appropriate objectives with his subordinates, assess their performance against those objectives, and take appropriate action if they are not achieved.

The principles and techniques of good management are independent of the values or ethics of the organization that uses them. They are the same for religious organizations as they are for commercial operations or even households. Their missions and their underlying ethics and values define the nature of these organizations and not their management approaches. Dioceses, like all complex enterprises, must be well managed to discharge their responsibilities and execute their mission effectively.

The Questions

Returning to the questions of how bishops can think about their leadership and managerial roles and responsibilities in relation to their spiritual lives, pastoral duties, and priestly vocations, one might make the following observations:

1. **Bishops have to play both leadership and managerial roles as well as carry out their other duties.** These other duties tend to be pastoral and spiritual in nature, but they also include such worldly things as representation and fundraising. However, the amount of time spent on leadership and management and other more worldly activities compared with the amount spent on pastoral duties will shift with increasing organizational responsibility and/or personal preference and individual skill levels. Appropriate and effective delegation of certain leadership and managerial tasks and responsibilities can free the bishop to concentrate on the things that only he can do and the things that give him the most personal fulfillment and satisfaction and are at the heart of his pastoral vocation.
2. A bishop can delegate much of the work of the Church, but he must retain the ultimate responsibility for ensuring that the mission of the diocese is being effectively carried out. This in turn depends on the ability of the bishop (or pastor) to obtain the necessary information and understanding to provide leadership and to maintain operational control of (manage) the organization. The operational effectiveness of the enterprise is largely dependent on the performance of the people and organizations to whom various tasks have been delegated. Accordingly, assessing this performance in a systematic way and on a regular basis and taking appropriate action—effectively exercise operational control—even this responsibility can largely be delegated by appointing a chief operating officer (COO), in which case the bishop’s key assessment responsibility is of the COO. In some cases (e.g., pastors, chief financial officers), the bishop (or COO) may possess the necessary skills to make this assessment. In other cases, he may require the advice and counsel of external advisors or advisory groups (e.g., pastoral or financial councils, auditors). Bishops can choose different balances between responsibilities they retain and those they delegate, and different ways to assess how well the delegated responsibilities are being carried out depending on the characteristics of their dioceses and their personal preference, experiences, and skills. Once size doesn’t fit all.

Accomplishing the pastoral and spiritual missions of the Church is completely consistent with achieving operational efficiency and maximum economic effectiveness as long as the leadership and managerial roles and responsibilities are properly defined and carried out.

3. Accomplishing the pastoral and spiritual missions of the Church is completely consistent with achieving operational efficiency and maximum economic effectiveness as long as the leadership and managerial roles and responsibilities are properly defined and carried out. The ultimate responsibility for the overall leadership and the success of the diocese lies with the bishop. On the other hand, responsibility for carrying out the great majority of the duties and functions of operating the parish or diocese can be delegated as described above. The key to successful delegation, however, is the implementation of effective systems for managing it. Bishops and pastors can be effective leaders without necessarily being good managers or devoting themselves primarily to management tasks. They do, however, need to understand the essentials of good management and appreciate its importance to carrying out their missions. They also need to assess (or have assessed) their strengths and weaknesses as managers and take appropriate steps to capitalize on their strengths and compensate for their weaknesses. This usually means designing and implementing governance structures and management systems and processes appropriate to the scope of their activities, the size of their organizations, and their own personal capabilities and preferences. Accomplishing these things requires openness and teamwork and building mutual trust, confidence, and respect with subordinates and advisors. In smaller dioceses
(or parishes), these structures and processes can be simpler and less formal. In larger ones, they will generally be more complex and formal and require more professional managers (either clerical or lay) to design and operate them. In either case, delegation without assessment of its effectiveness transforms delegation into abdication.

The ideas about leadership and management . . . reflect the leadership and management practices of the world’s most successful competitors. They are highly applicable to the task of leading and managing a diocese and in no way conflict with the mission of the Church or the diocese.

Summary

In summary, the twin tasks of leading and of managing have always been part of the priestly duties of the bishop. And many dioceses have been well managed. But the extraordinary increases in the range and accessibility of information and transportation that have driven the globalization of the world economy have changed forever the environment in which dioceses (and parishes and the Church as a whole) operate. Increased governmental and public scrutiny has added another dimension of complexity and challenge. Moreover, these changes have substantially raised the hurdle for what constitutes effective leadership and good management. It has become much more difficult to recruit people, and especially the most talented people, into the clergy; much more difficult to attract people to the ranks of the Church and keep them there; and much more difficult to attract and deploy effectively the financial resources required to carry out its sublime mission. In other words, the Church is operating in a much more competitive world. The ideas about leadership and management outlined above reflect the leadership and management practices of the world’s most successful competitors. They are highly applicable to the task of leading and managing a diocese and in no way conflict with the mission of the Church or the diocese. In fact, they are quite complementary and facilitate its effective pursuit. They are already utilized with great effectiveness in some dioceses and parishes. More complete and widespread adoption in the Church would lead to a Church much more capable of fulfilling its mission in today’s highly competitive race to win the minds and hearts and souls of the people.
Overview of Activities and Accomplishments

Panel

Ms. Kerry A. Robinson (Moderator)
Mr. Thomas J. Healey
Rev. J. Bryan Hehir
Dr. Kathleen McChesney

Thomas J. Healey

It is my privilege to provide an overview of the consulting work of the Leadership Roundtable.

In just over two years of consulting work, the Roundtable has had 15 clients on 15 different projects. By the end of this year, our consulting work will have involved four of the ten largest dioceses and archdioceses in the country, as measured by Catholic population. And that work will have generated tangible value in terms of dollars and cents. It has also benefited from volunteers who have contributed to these consulting projects, because we do not have enough internal resources to do it without them. Leaders from nonprofit consulting firms, senior Church leaders, and senior executives from companies such as McKinsey, 3M, and JPMorgan have aided in this work.

Let me highlight three projects. The first is the Catholic School Budgeting Project in New Orleans after Hurricane Katrina. The project partner was McKinsey and Company, and they were an enormous blessing to this very complicated assignment.

I am going to focus on the results delivered in five key areas for the New Orleans schools. First, a budget process was implemented and validated. All schools will be on a web-based accounting system by 2009. New Orleans is now a leader across the United States in school financial operations. Second, operational scorecards and dashboards are now in use, representing best practice across
any kind of educational establishment. Third, the urban schools have been reorganized into a consortium. Sixteen million dollars has been raised to date, and eight teachers out of the ACE program at Notre Dame have been recruited to the urban schools. Fourth, coordinated purchasing has commenced. And finally, the Roundtable continues to work with the Archdiocese on school and revenue enhancement projects.

The second Roundtable project I’d like to mention is the diocesan reorganization in Paterson, New Jersey. The results delivered include restructuring of the dioceses into divisions, the addition of directors of technology and human resources, and the identification, recruitment, hiring, and training of a lay chief operating officer. Forty million dollars of outstanding receivables will be reduced to $22 million by 2011. And two specific value engineering projects were created and implemented, one in the area of employee benefits, the other in the area of energy savings.

The third project I’d like to outline is churchEpedia. This website was launched last year. Its mission is dissemination of best practices in finance, management, and personnel—the parallel missions of the Leadership Roundtable. These best practices have been created both by the Roundtable and other sources, where they are then vetted, verified, and added to the website. Today, more than 600 content packets sit on this website. Usage over the last year has more than doubled.
How can you be involved in working with the Roundtable? For churchEpedia, there are three different ways. First, submit best practice ideas—ideas that you think would be useful to others. The spotlighting of a best practice in diocese A that can be used by B, C, D, and E is how the Roundtable creates leverage and results.

Second, explore the website (www.churchEpedia.org). Give us feedback on how we can improve it. It can always be improved.

Third, in the area of consulting, identify potential opportunities where there are problems we can help with. We are at the point now, having had 15 projects, where we can refine a little bit what we are good at, what we are capable of helping with and, importantly, knowing where we cannot.

So, be sure to submit your ideas. And let me conclude with a word of gratitude for the extraordinary effort of John Eriksen, who has made this work such a success.

Rev. J. Bryan Hehir

As an introduction, I’d like to play off of the theme about how far this organization has come. I remember being invited in 2003 to a meeting in Washington by Geoff Boisi, whom I had never heard of, and by Fr. Don Monan [a Leadership Roundtable Board member], whom I certainly had known for years. I wasn’t quite sure what the meeting was about, but I went anyway. Since then, it’s been a long, but very productive, journey. I think the key thing is that the Leadership Roundtable was the right initiative at the right moment. Not only was it the right moment in the Church, but it was a time in which standard-setting for nonprofit organizations in the country—religious and otherwise—was both under scrutiny and drawing intense interest. This organization fits into that framework.

I’ll report on three projects this morning. First is the Work of Hope, aimed at renewing and strengthening trust in the Catholic Church in the United States. Second is diocesan planning for excellence, and third is performance development systems for the evaluation of personnel in the Church.

Generally, these projects arise from the earliest days of the Roundtable’s discussions, and while all three are still works in progress, they will be publicized throughout the Roundtable during the coming months. In addition, all three are the products of collaboration between the Roundtable and outside groups. And finally, each has an interesting architecture. More specifically, renewing trust affects the Church nationally. Planning for excellence is a challenge facing every diocese. And the development of evaluation, personnel, and roles in the Church gets you inside the diocese and
down to the parish level. So, the architecture of these three projects nicely spans the scope of the agenda of the Church in the United States in a particular way.

The Work of Hope—renewing and strengthening trust in the Catholic Church in the United States—is the first project I’ll address. It confronts a major complex challenge that touches the very fiber of the Church in this country. Second, it offers an opportunity for the Leadership Roundtable to make a crucial contribution to a task that everybody recognizes, but no one is crystal clear on how to accomplish. And third, it is still very much a work in progress.

The challenge facing the Work of Hope is that ministry is based on trust. You cannot minister without trust. The particular work of the Church is different from other organizations, but every organization needs a dimension of trust. The Church relies on trust to a degree unequalled in most other institutions, particularly in light of the crisis in the Church over the last eight years. Finally, what the Leadership Roundtable focuses on is what you might call the temporalities of Church life. There are many things that need to be addressed in order to build trust. But questions of finance, management, and human resources are what the Roundtable focuses on as a crucial dimension of the larger problem. This work in progress will get more attention during this meeting.

The second project is diocesan planning for excellence. This is an issue that, again, every diocese faces. And that’s because of a mix of financial constraints, declining numbers of what you might call Church “professionals” in the sense of priests, but also the rising number of Church professionals among laity. It’s also an issue that every diocese faces because of the changing demography of Roman Catholicism.

What the Roundtable tries to do is to develop a model of strategic planning . . . by drawing from other organizations, and . . . recognizing the distinctive features and necessities of what it means to be the Roman Catholic Church.

The most recent report from the Pew Foundation on the landscape of religious life in the United States poses a specific challenge to Catholicism. One-third of the Catholics they interviewed have left the Church. At the same time, there is an enormous infusion of immigrant populations to the Church in the United States. This double challenge—of recapturing the third who have left and ministering to those who are just arriving—is a moment of opportunity for the Church, but obviously very strenuous standards must be established and met.

What the Roundtable tries to do is to develop a model of strategic planning. It does so by drawing from other organizations, and also by recognizing the distinctive features and necessities of what it means to be the Roman Catholic Church. At times, we look like IBM, but we are not just IBM. The
question is, how do you mix and match continuities and discontinuities? To that end, six modules have been produced: on planning in general; on planning for schools, parishes, mission, and ministry; and on the development of vision and its implementation.

The third project I will mention is the performance development system, originally entitled the “360-degree Project.” It is about the development of sophisticated assessments and performance development of Church personnel. It was modified from the 360-degree Project for two reasons. First, the existing standards of personnel development in the Church in the United States are so diverse, so developed in some places and not in others, that you could not just implement the 360 process. Second, there are particular challenges when you evaluate the multiple roles that make up Catholicism, including ordained, lay, and religious lay. So, the question becomes, how do you put those standards together in one place?

Interestingly enough, the Leadership Roundtable is part of a collaborative model with the National Federation of Priest Councils and the National Association of Church Personnel Administrators. Once again, it is drawing on established groups that are also involved in this work. Basically, what it tries to do is to develop a model for training standards, training for trainers, and an instrument for assessing church personnel and their ongoing performance development.

Let me emphasize again that these three projects are all works in progress, and are subject to more review and consultation.

Kathleen McChesney

I’m anxious to talk about the next two items, because they are things that I have already used and found to be very valuable in working with Catholic organizations. I have also recommended them to my friends and colleagues in the private sector. They are the Standards for Excellence codes and the various communication products of the Leadership Roundtable.

I think it is important before I start to remind all of you that in a very short period of time, this organization—the Leadership Roundtable—has gone from virtually a dream, a conception, an idea, to its own brand. If you know how hard it is to develop a brand, and you look now at what the Leadership Roundtable has accomplished, then you realize what a phenomenal story this is.

When you mention the Leadership Roundtable, many people know what it is, know what it is about, and know that it stands for quality. That is one of the reasons why the Standards for Excellence is one of its best products.
The *Standards for Excellence* is an ethics and accountability code for Catholic parishes, dioceses, and nonprofits. It is based on some of the best ethics codes around the country that were put together by the Maryland Association of Nonprofits, which has established the Standards for Excellence Institute.

This group licenses these ethical codes to organizations such as the Roundtable, so they can take them and adapt them to their organizations. Even though they appear to be straightforward, this project required a lot of effort. A Roundtable committee put our *Standards for Excellence* together and I’m really proud of what was accomplished.

If a pastor uses the *Standards for Excellence*, he now has a tool, a valuable guide. He has a new resource. These standards have not been “dumbed down,” but they are very clear and usable.

The *Standards for Excellence* codes are very important products of this organization. Each of its guides is based on one of eight principles, and within each principle there are various tasks that are recommended. Some need resources, some need thought, but all are easy to accomplish.

These eight important principles underscore the importance of having (1) a mission statement, (2) governance and advisory councils, (3) conflict of interest statements, (4) financial and legal guides, (5) human resources policies, and (6) fundraising guidelines. They also reinforce the importance of (7) defining your ministry, (8) being open and transparent, and (9) addressing public life and public policy.

It is the goal of the Roundtable to distribute the *Standards for Excellence* nationally. Although 5,000 copies have been distributed so far, we are working on a strategic plan to have a much wider distribution within Catholic organizations, parishes, and dioceses. We then want to find ways to help the Partners in Excellence®—which are the organizations that have actually adopted the *Standards for Excellence* and are partnering with the Roundtable—to do some self-assessments to see what kind of work remains.

We would not have been able to implement the *Standards for Excellence* without the very generous donation of a foundation that helped purchase the license and do the printing and the distribution. I am very grateful to them, as I am to the committee that put the project together. The Committee includes Sr. Pat Mitchell, Fr. John Beal, Barbara Anne Cusack, Ned Dolejsi, and Michael Brough. Congratulations to all of them on a tremendous job. You can read more about the *Standards for Excellence* on the Roundtable’s website (**www.nlrcm.org/standards**).

The second area I’d like to cover with you is the Roundtable’s communications products. Our website has come very far. It is an excellent website with features such as a scrolling news bar that attracts your immediate attention. If you visit the site every few days, you will invariably catch something new right away.

The website audience has dramatically increased—last year there were over 43,000 visitors, while the number just through just the first half of 2008 is 35,000. The website serves as another vehicle for distributing our electronic newsletter through RSS (Really Simple Syndication) feeds, as well
as audio and video downloads. The Roundtable’s Communications Committee deserves credit for much of this success.

Beyond the website, the other part of our communications portfolio is printed materials. The portfolio includes our brochures, DVDs and workbooks, the proceedings from the Wharton Conferences, and other publications. You can get those online for free, or order them in hard copy form. Either way, they convey the message of the Roundtable.

An important point I want to make is that it’s been my experience in working with organizations that communication is often the problem. In the case of the Roundtable, however, communication is the solution. It’s the way you get your message across, and the way you solve issues and challenges, particularly in new organizations such as the Roundtable. It has been through the work of the Communications Committee following its strategic plan that we have been able to accomplish so much, and get the word out about all the great things that are being done.

The last thing I want to say about communications concerns the power of the verbal message. The staff, Board members, and council members of the Roundtable have been out there consistently delivering that message of the Leadership Roundtable’s mission. It is often Kerry Robinson who is the messenger, speaking to diocesan and development groups, and to lay groups such as Legatus. She has also spoken to priest councils, and to a wide variety of national and diocesan organizations. By spreading that message, Kerry and Board members have been able to convey the philosophy of this organization, as well as to inspire and challenge.
“Be the change you want to see in the Church. Aspire to excellence at every level for the sake of the Church, and ensure that your parish and your ministry are worthy of generosity.”

I know that some of you were at the National Ministry Summit in Orlando earlier this year. Kerry delivered remarks at that conference that I think are really important, and that encapsulate what communications should be from this organization.

She told her audience, “Be the change you want to see in the Church. Aspire to excellence at every level for the sake of the Church, and ensure that your parish and your ministry are worthy of generosity.” Those are vital parts of the Roundtable’s message, and I hope they are often repeated because they are so powerful.

Finally, the communications effort goes on. There are presentations planned for later this year with the National Federation of Priest Councils, keynotes with the 40th anniversary of the National Catholic Development Conference, and a number of other organizations and groups. If you know of groups that could benefit from hearing from a Roundtable member, please invite us.

I want to thank Susan King, the Chair of the Communications Committee, and members Fr. Tom Reese, Bill Baker, Fr. Bryan Hehir, Joe Kelsch, Sr. Mary Johnson, Owen McGovern, David Spotanski, and Michael Brough. And thanks to the other Roundtable committees that have done so much to share our message.

Plenary Discussion Highlights

On expanding the reach of the Roundtable…

Jon O’Herron:
I’d like to know how we take the information and the talents we have and disperse them to a much greater part of the Catholic Church in the United States.

Kerry Robinson:
I think it would be a mistake to look at this annual meeting as the sole barometer of the commitment, engagement, and support of the nation’s episcopate, because we have been working from the very beginning with a core group of 55 bishops, representing all 14 regions of the United States. Many more than those 55 seek us out for consultation, either direct consultative work, or they invite one of us into the diocese to present to the whole
presbyteral council, the diocesan leadership team, or other active parishioners. They serve as emissaries and advocates.

I’m extremely pleased by how far we’ve gone down the road of proving over time that we are who we say we are, which is a committed group of faithful Catholics who want to strengthen the management of the Church.

**On performance evaluation…**

*Fr. Bill Byron:*
When you get into the issue of performance evaluation in the parishes—or in the place where I’ve been for the past two years, secondary schools—you fly right in the face of the culture. You get resentment, and it’s not easy going. But it’s clear that something is going on in the wider world of employment law, and we can perhaps benefit from the knowledge gained there.

*Fr. Bryan Hehir:*
I think one of the virtues of this organization is the way it has worked across professional and organizational lines to draw valuable resources. I think the key whenever you try to analyze and shape the Roman Catholic Church is to understand that it takes more than one lens to view it, and that you can draw and learn from others—and we had better do that.

**On our relationship with the bishops…**

*Joseph Finn:*
Do we have an official liaison with the USCCB? Is there any type of protocol?

*Kerry Robinson:*
By mutual design, it is not formal. We do not have a bishop moderator, for example, who serves on our Board. Rather, at the administrative committee level of the Conference, all bishops were informed about our activities and what we are offering the Church, and they were encouraged to make a decision on their own about how best to avail themselves of the resources we offer. I want to be really clear that from the beginning, I have maintained that the *onus* is on us to prove over time that we are who we say we are.

We can now point to three years of accomplishments and engagements. For example, a bishop in the southeast called us and said, “I am persuaded to start a lay council of advisors, and I want to open up all of the books of the diocese to this select group of executives in my diocese. Before I embark down this road—and I admit I’m nervous about it—I want to know if the Leadership Roundtable can assist, guide, and advise us.”

This is a wonderful testimonial because we did not go to him. He thought to come to us.
On the issue of scalability...

Fred Gluck:
I believe the next level for us is scalability. What we have learned is that the Bishop’s Conference is going through its own transformation in its thinking, and in the way its members interact and work with each other. We want them to know that from the very first day the Leadership Roundtable was created, it has worked cooperatively through the Church hierarchy. Archbishop Levada was our first advisor. He was the one who recommended to us that we identify those 50 bishops who are in key spots throughout the country. We have been working very closely and collaboratively with them ever since. That has meant that we have had to establish trust in the eyes of the hierarchy. We committed ourselves to that task by focusing on the quality of our product and the thought leadership we could bring. And from the comments that we’re hearing from the bishops, we are achieving that.

Geoff Boisi:
We’ve grown to 185 members on our council, many of whom serve on the dozen or so committees we’ve put together. They’re developing a library of tools that I think we should all be very proud of. The issue that now faces us is how we reach not just 50,000 or 60,000 Catholics, but millions of Catholics. And for me, that raises the question of how we can attract the help of the secular community and the professional community when it comes to distribution issues.

I believe one answer is that we have to reach out to the higher education community. We have to work with and get greater buy-in from the younger talent and the professional talent we have in the Church. We need them to provide assistance to our committees, and to help us disseminate our material throughout the country.

Coming up with ideas and the execution of those ideas will enable us to reach scale. A key part of that is talking to the bishops who are at our conference to get their guidance and advice on building greater support and involvement from a larger group. With that goal in mind, a number of us went to the USCCB a few months ago, where we disseminated a lot of new information on our organization. We want to make it as easy as possible for them to gain access to us.
On the issue of accountability...

Fr. John Hurley:
It’s wonderful that the Standards for Excellence are out there, and that we have some parishes signing on to them. But I think that accountability is a key piece here. One of the things I’ve heard from pastors is that they would like to have a tool they could use with their councils and staff to evaluate accountability and responsibility standards. I believe it’s also critical that the Standards for Excellence be renewable, in a sense. You don’t just sign on once, but continue to keep it in the forefront, and the pastoral council, along with the pastor, continues to commit to these standards.

Kathleen McChesney:
The renewable piece is very important, and the [Roundtable] Board and the committee are trying to find ways to help people do some self-evaluation, or even external reviews of that. A lot of people are tired of compliance projects. So you have to convince them one by one that this is really a valuable product. And I truly believe that it is.

On products that support the diocese/parishes...

Sr. Katarina Schuth:
I have used your products in my class, and the students really like a number of them very much. But a question I have—or perhaps it’s more a suggestion—is to what extent could you produce materials that take into account the tremendous diversity among parishes and dioceses? For example, size, ethnicity, racial differences, economic status, educational levels, age differences, and so on. The idea of regional meetings could be very helpful in this regard.

Participant:
I’m on the board of an insurance company in New York, which is the third largest underwriter of Medicaid insurance in New York State. We operate in all but three counties in New York State, which covers eight or nine separate dioceses. We have decided to go forward with a product offering to all the dioceses in the state: a pharmaceutical benefits program whereby each of those dioceses could, if they wish, sign up. And it would cover whatever groups they have in their diocese—schools, clergy, Catholic Charities, etc.

We are confident that we can execute this and save them no less than 5 percent of their pharmaceutical costs, as well as take the administrative burden away from them. We are going to start with the Diocese of Brooklyn, and have seen good activity from the Dioceses of Rochester and Syracuse, as well. To the extent we can execute this plan, I think we can show how a lay group can provide true value to the diocese by saving them a significant amount of money.
On the relationship with bishops...

Participant:
I cannot speak on behalf of the USCCB, but I just want to commend you on how far you’ve come in building what I call a very significant positive relationship with the bishops. It is getting stronger as it goes along. You do a marvelous job of extending your flock. And the quality and the excellence of what you are producing is going to win the day eventually. That is what you want.

So, I just want to say I think you’re on the right track. I like the idea of regionalizing, or doing something different perhaps, to attract more bishops to come here. You also need to address in some way what I consider to be the greatest pastoral challenges of the Church in the United States today. They include the growing Hispanic presence and the changing demography of the Church. This is being addressed in different ways by different dioceses.

Kerry Robinson:
We are translating the Standards for Excellence. But you are absolutely right.

On reaching out to the secular media…

Geoff Boisi:
In a couple of weeks, the Carnegie Foundation is convening for us a group of secular foundations to listen to our story, and to why they should be contributing to Catholic organizations. That is a way we are trying to gain additional resources in order to disseminate a lot of the information we have been talking about. I think we’re now at the point where we’ve demonstrated the real quality of the tools and information we need to make known to the secular world. And there’s no question that to get it to the 65 million Catholics in the United States, we have to go through the secular press in some way.

That process has started. We’ve reached out to various people, from the U.S. News and World Report, The New York Times, The Wall Street Journal, and Bloomberg, as a way of talking about what we’re doing from a secular standpoint. You should expect over the next year and a half to see more about that effort and how it helps us on the scalability issue. The more acceptance we get at the grassroots or parish level, the more you’ll see us grow.
On the Roundtable's work in the field...

Archbishop Hughes:
As the Archbishop of New Orleans, I’m on the receiving end of some very important and helpful service from the Roundtable. I really want to express my gratitude to the Roundtable for that, and especially to Geno Fernandez and to John Eriksen for the extraordinary work done on the ground. Their efforts have made a tremendous difference for us, particularly in the development of a consortium for newly formed central schools in the most devastated areas of the Archdiocese.

Second, I’d like to reaffirm the point Fr. Hehir made, that all ministry is based upon trust. Yours is a ministry, and I think your growing track record is going to be the most important way to build on that capital of trust. Word of mouth is going to be as effective as anything else among the bishops. Also, I think that this conference opens up very important opportunities for making available the materials that you have developed, as well as your collective wisdom and expertise.

The last comment I would like to make—and this might be difficult to realize—concerns a dimension that I find could be developed in your materials. And that’s a spiritual framework for the very practical leadership and management issues which you are addressing. You are trying to make available the specific gifts that are yours, including your background and experience. But what is unique about the Church is a spiritual mission. Priests and bishops need to be told about the spiritual dimension to leadership and management so that they don’t see it as something foreign to spirituality, or as something that’s not open to spiritual growth and development.

Thomas Healey:
There are two places where we have seen some potential leverage from our work. One is healthcare where, two years ago, we focused on a consortium in Texas. The second area where we seem to be gaining some traction is collective energy purchasing. Those two areas can be very scalable across the country and its many dioceses. And that’s the kind of approach we’re trying to take in some of our work.
Best Practices from Model Parishes

Panel

Rev. John J. Wall (Moderator and Panelist)
Ms. Leisa Anslinger
Rev. Joseph Donnelly

Rev. John Wall

I am the president of Catholic Church Extension Society, a 100-year-old organization that has as its mission to link the American Catholic Church together so that the dioceses that are under-resourced might receive the support of the larger Catholic community in the United States. There are 80 dioceses that are called “home mission dioceses,” and the Extension Society is a powerful way to resource them in their evangelization and faith formation efforts.

However, I am here today on this panel as the former pastor of Old St. Patrick’s Church in Chicago. Joining me are Leisa Anslinger, who is the pastoral associate at Immaculate Heart of Mary Parish in Cincinnati, Ohio, and Fr. Joe Donnelly, Pastor of Sacred Heart Parish in Southbury, Connecticut.

If you were to ask a politician about excellence in his or her profession you would be told more than once to always keep in mind that all politics are local. You have before you three panel members who share your dream for excellence in every dimension of Church life. And if there is one point that we want to make sure you always keep in mind, it is that excellence in Church life is built on a commitment to excellence in your local parish life and ministry. While we will be speaking from different experiences, we hope that you will hear the common commitment we share to develop models of excellence in parish life and best practices in congregational leadership and administration.

To begin with a bit of history, I have been pastor of Old St. Patrick’s Church for 24 years. It is a downtown, central city church almost in the shadow of Sears Tower located in what were once the backwaters of the Chicago River. Built in 1856, it happens to be the city’s oldest church and public
building, and that is probably why it wasn’t torn down when the interstate highway system cut through the once-teeming neighborhood.

In its heyday, the parish had a grammar school, two high schools, a settlement house, and an orphanage. It did everything that an immigrant church was supposed to do by welcoming the poor to their new life in America, strengthening their awareness of their dignity and truth as beloved daughters and sons of God, and developing their talents and skills to pursue their best dreams for their children and grandchildren. Like so many other urban churches, the next generations fled the old neighborhoods for newer expressions of life and church in the suburbs.

By 1983, when I arrived as the new pastor, there were literally no residents left in what had once been a vibrant community. The area consisted of run-down warehouses, vacant lots, and one shabby but beautiful historic church. It sat somewhat tentatively at the very edge of the interstate highways that intersect one another just west of Chicago’s business district.

Church is not a member-centered institution. Clubs are member-centered organizations. The Church is mission-centered and mission-driven.

The very first and most important thing I learned as the new pastor of a parish with just four members is that you don’t call them together and ask “What are your needs?” With only four people, it became obvious that you can’t create a parish by focusing on parishioners’ needs. This became the foundational insight for me. Church is not a member-centered institution. Clubs are member-centered organizations. The Church is mission-centered and mission-driven. To be member-centered is to be concerned about privileges. As American Express says, “Membership has its privileges.” On the other hand, membership in the Church is focused on responsibility. Our concern is always on responding to what we discern God is calling us to do as God’s people in the world and for the transformation of humanity. In my judgment, if we are going to pursue excellence in Church life and leadership and administration, it must begin with this fundamental realization: to be Church is to be mission-centered and mission-driven.

Let me share with you just one short example that might highlight the difference between mission-centered and member-centered. One of Old St. Pat’s missions is to reach out to the young adults of metropolitan Chicago. They return from graduation in America’s Catholic and secular universities and often find difficulty in reconnecting with parish life. Here is a litmus test that you can use right out of the experience of young adults, which distinguishes the two models of church: the phone rings at your parish, a staff member picks it up, and the young adult caller announces “I’m getting married!” If the first response from the parish it to ask the question “Are you a registered parishioner?” you know you are in a member-centered model of church. But if the response is “Congratulations! Wonderful news! How can we help you celebrate this profoundly transforming
and spiritually defining moment in your life?” (or words to that effect), then you know that you are
encountering a mission-centered model.

Let me move from the mission to the leadership and management of the mission. I find the role of
pastor in the Catholic Church to be truly fascinating and filled with energizing possibilities. When
you think of the leadership structure in our hierarchical church, we have the pope of the universal
Church, the bishop of a diocese, and the pastor of a parish.

That is a remarkably simple structure for a transnational global organization of billions of people
and a structure that can be open to great innovation and creativity of expression. Canon Law gives
the pastor a lot of responsibility, and I believe every pastor has the opportunity to exercise that
responsibility with genuine imagination in order to express pastoring in more and more effective
ways. One way is to imagine the role of pastoring as partnering, and I’d like to cite three ways that
we have been doing this at Old St. Pat’s.

First, a mission-centered institution is meant to perdure over generations. Pastors and people
change, but the mission is meant to continually grow and thrive. As pastor, I asked a group of wise
counselors to form a board that would have as its primary responsibility to be the guarantors of the
mission of Old St. Pat’s. Board members also change, but the Board of Guarantors as a structure of
the parish is entrusted with the mission to make sure that Old St. Pat’s remains strong and vibrant
for the next 150 years. They continue to look at St. Pat’s with a long view and a strategic vision, and
they consistently challenge us to “raise the bar” on our effectiveness to express that mission and
vision in all that we are and do.

A second expression of “pastoring as partnering” involves administration. Old St. Pat’s has an
administrative team of pastor and executive director. In my early years as pastor, I found myself
constantly saying to new staff members, “I want to tell you the good news and the bad news about
joining the Old St. Pat’s team. The good news is that this is a wonderful, exciting, and creative place
to work. The bad news is that I’m your boss.” I said that right up front and very deliberately because
I felt very inadequate about my own management skills. Thirteen years ago, we were gifted to add
to our staff a recently retired business executive who is a brilliant manager of people and mission.
More than a business manager, he truly shares the leadership of Old St. Pat’s with me. Joining our
talents together for the betterment of the mission, St. Patrick’s has grown to a degree that never
would have happened had I continued to muddle through on my own. I believe pastors have the
responsibility for bringing excellence to their role as leaders and “pastoring as partnering” is a pow-
ernful way of doing it.

The third expression of “pastoring as partnering” has been through joint ventures that have been
established to respond to the needs of the poor in our city. Early on, Old St. Pat’s made a commit-
ment as a part of our mission to take positive steps to eradicate poverty in Chicago. Convinced that
what the Catholic Church does best to help people move out of poverty is our long and strong his-
tory of education, we resolved to start the first new Catholic school in the archdiocese in over 25
years. Keeping with our mission focus, however, we resolved to create a school that went beyond
our members and that would commit to reserving 30 percent of its student body for children of
economically disadvantaged families. The Frances Xavier Warde School, which started with 35 students in a storefront, now has over 750 students on two campuses. It is a collaborative effort with our cathedral parish and is sponsored by a newly created “lay apostolic institute.” Each pastor has a seat on the board and each parish sees as part of its mission to Catholic education to sustain and develop this unique non-parochial Catholic School.

We literally have hundreds of Old St. Pat’s members involved in social outreach efforts that are significantly transforming the lives of the poor in our city and even throughout the world. We have mission partnerships in Central America, South America, Africa, and India. Each program is a separately incorporated 501 C 3 with a lay board and Old St. Pat’s staff representation. One of the powerful benefits of this joint venture approach is expressed in our outcomes. The parish’s annual tithe of $200,000 is an investment that results in over $7 million a year of programs that are positively impacting the lives of the poor and moving many people out of the grip of poverty into self-directed responsible lives.

This short overview of Old St. Patrick’s obviously doesn’t touch the full expression of what our church life is like, but I hope it gives you a sense of what can happen in a parish that is “mission-driven,” that has chosen “partnership” as a way of exercising leadership, and that is committed to excellence.

Leisa Aslinger

Having been with Immaculate Heart of Mary Parish for the last 13 years, I’d like to share with you a 12-year process of transformation of a suburban parish in Cincinnati. In 1995, Fr. Jan Schmidt arrived as the pastor of a parish that was in serious debt and was deeply divided. There was no plan for servicing the debt. The parish was not paying its healthcare premiums nor was it paying diocesan assessment.

There was a dynamic in the parish of “he or she who yells the loudest and the longest gets his or her way.” It made for an interesting moment in the life of a community. Fr. Jan describes a couple of key insights in that first year that helped to transform us into the community that I have grown to love in these last dozen years.

The first thing that happened was that he was introduced to the bishop’s pastoral letter on stewardship. He went to that letter initially thinking it was going to tell him how to get out of the financial mess that the parish was in. He discovered something much greater than that. He began to be introduced to parishes around the United States that were learning to live the life of discipleship and stewardship as a way of life.
That began to help him settle on a vision of parish that could lead us into the life of the community that we now experience. The second thing that happened was that he was sitting in an empty church one day in prayer and began to reflect on the liturgical principle of full conscious and active participation. And he realized that that really is a principle for the Christian life, and for our lives as Catholic Christians who are called to full conscious and active participation in the life of Christ as expressed in and through the parish community.

Within the first six months, he began to draw together the parish leaders who were present at the time and to develop some listening mechanisms and some structures for parish leadership. We did a full census and survey of the parish community and developed our first long-range plan.

That required a number of key shifts in the ways leadership happened in the parish. We had to change from a very pastor-centered and staff-centered way of enacting parish life to a way that calls everyone to offer the gifts they’ve been given by God. The staff role in that is to entrust ministry to the parishioners and to equip them so that they can do the things that they are called to do. It calls us to mutual respect and to a recognition of the gifts that are within the community. It calls us to fiscal responsibility and to transparency.

Our first long-range plan mostly identified building needs, since the physical plant was failing. The buildings had not been maintained. They were no longer adequate for the size of the community. We went through the incredible experience of construction and renovation of our entire physical plant in an 18-month period.

Because the community had been so divided within itself, Fr. Jan’s decision was that we would not do one building project to the exclusion of others. So we worked on them all at once. Shortly after the construction and renovation of the facilities, we did a second long-range plan. This plan was focused on spiritual needs and social outreach looking at the ongoing life of conversion in Christ as disciples and stewards that each of us is called to. Throughout that period of time, there has been a focus on praying liturgy well, on hospitality, on faith formation for everyone in the community, and on a renewal of ministry within the community.

Over the course of the initial 10 years that I’m describing, we experienced such a transformation that people began to talk of the parish as being their home and the place where they were challenged to live as disciples. They know what is expected of them as members of the community and as Christian disciples. We began to hear people say, “It feels different here.”

That spiritual commitment is lived out in inviting others to come to church. . . . And when that happens, they are more inclined to serve in their communities, not just in the parish.
What we found in late 2005 was that that feeling of belonging is really important. The way we learned that was through some research the Gallup Organization initially did on corporate life, and which they reapplied to the lives of people of faith in the United States of all denominations, including Catholic parishes.

About 100 Catholic parishes right now are working with these processes. Immaculate Heart of Mary is one of those parishes. It turns out that the feeling of belonging is crucial because when people feel deeply that they do belong, when they are engaged, they are more likely to be spiritually committed.

That spiritual commitment is lived out in inviting others to come to church—to various functions, to Mass, or to something that is happening at the parish. And when that happens, they are more inclined to serve in their communities, not just in the parish. In fact, the research says that those who have that sense of belonging or who are on the way to that engagement are doing all of the community service work in the United States today. And it’s these people who are more likely to give financially to their parish communities.

Essentially, engagement is a value system. It says, “As I come into the life of a community, I have a sense that the community will value me and will be of value to me. . . .”

All of us who know the life of discipleship know that it does not get easier. Yet we know the value of community and what that rootedness, that community, gives us so that we can live the lives of discipleship that we are called to. There are some specific factors that have been identified in this process of engagement. People need to know what is expected of them. Essentially, engagement is a value system. It says, “As I come into the life of a community, I have a sense that the community will value me and will be of value to me. It is important that I know what is expected of me.”

It is important that those expectations are clear and identifiable and that there is some accountability built in. Another of the factors is that, when people are able to say, “In my parish, I have the opportunity to do what I do best,” they are vastly more likely to be engaged than not. That led us to participation in a second process developed by the Gallup Organization through the initial research of Dr. Donald Clifton. Some of you are familiar with StrengthsFinder. There actually is an application of StrengthsFinder for faith communities called Living Your Strengths. In that process, the research has identified 34 types of talent that people possess in one degree or another. You can do your own online assessment.

You identify your top five themes of talent, and you’re given some thoughts about how you might develop and offer those in ministry and service. The response to Living Your Strengths was so over-
whelming in our community that we’re still in the process of figuring out exactly how to tap into
this wellspring of talent.

Working with some parish leader groups and then introducing StrengthsFinder to small faith com-
munities and to retreat teams, we expected 400 or so parishioners to go through the process initially,
based on previous responses to different parish programs. What we found instead was over 1,000
people responding at the first opportunity. In fact, the response was overwhelming in areas of
parish life where we had previously not seen a lot of involvement, people who were not engaged.
This was not a process of reaching out to the “in circles,” so to speak, but rather seemed to appeal
to people who were looking for something deeper within their lives of faith. They felt that discov-
ering their talents and then being able to offer those in meaningful ways was incredibly important
in their lives.

Another factor important to all this is that people need to know how to offer feedback or opinions,
and what the process is for working through the discernment process of parishes. In that regard,
there is a question on the survey that measures engagement by asking “In my parish, do my opin-
i ons seem to count?”

While we are not a democracy as a Church, it is important for us to have ways for people to offer
their insights and their wisdom and to know they’re going to be valued. Learning about engage-
ment gave us a way to focus more intentionally on the patterns of planning and the strategic long
view of the parish community. This view is systemic in nature because we are looking at the under-
pinnings of parish life and how we live as members of the Body of Christ together. It is measurable.

There is a survey you can give in your parish that measures engagement. If you do that over time,
you can see growth. You can see the effects of the strategies you’re putting in place. Because of that,
it engenders a very high level of conversation among parish leaders in a way that I haven’t experi-
enced in other situations.

Let me offer some statistics that I think will illustrate this. Between 1995 and 2007, we experienced
a 22 percent net increase in parish families. As a transient community, we see about 200 families go
in the course of a year, and about 250 families arrive. So there’s this constant churning. In that same
period of time, we saw a 115 percent increase in the numbers of parish ministries. Most of those
focused on social outreach in our city and our world. They included a 100 percent increase in the
number of adults actively serving in ministries and a 147 percent increase in financial stewardship.
Nationally, about 16 percent of Catholics are engaged in the life of their parish community, based
on national surveys, and around 49 percent are not engaged. Another 35 percent are actively disen-
gaged, which means they’re either coming to Mass weekly but are very negative, or they’re not com-
ing to Mass at all. Those are the two forms of the actively disengaged.

In contrast to that, when we did our first engagement survey in 2006, 27 percent of our communi-
ty was engaged. And when we did the same survey 18 months later, 30 percent of our community
was engaged. And so we can measure the impact of the kinds of strategies, the kinds of leadership
that we’ve been fostering within the parish community.
Between 2007 and now—with the advent of the knowledge of engagement and with the addition of StrengthsFinder—we saw an 8.5 percent increase in the willingness to serve in ministry, as expressed in our stewardship commitments, beyond the 100 percent increase we had already seen, and a $161 per family increase in financial stewardship commitment.

So what we feel is happening is that we’ve been given some concepts and language to articulate what we’ve been experiencing for the last 12 years. It gives us the opportunity to be very intentional about that, and to increase the ways in which our parishioners are drawn into leadership in meaningful ways.

Rev. Joseph Donnelly

For the last five years, I have been pastor of Sacred Heart Church in Southbury, Connecticut, which has about 2,200 households and is very age diverse, but not very ethnically diverse. We have the largest percentage of retired people of any town in Connecticut in our parish. We’ve also seen a huge influx of young people and their families moving into our parish.

As often happens with God’s grace, about six months after I arrived two bankers came to see me to tell me that two blood sisters had left a million dollars to the parish. So what did we do with this? I pulled back a little bit and talked to some people in the parish and saw it as a great opportunity to bring the parish together around our mission. We were an affluent community. We did not really have a great need. There was no debt in the parish. So it would be a great opportunity to help people appreciate the mission-driven nature of the Church. I think that’s so central and such an important item for all of us who work in Church ministry and who are part of the Church to understand. So we hired an outside facilitator and had open parish meetings that began not with, “What do we do with a million dollar bequest?” but with “Who are we? And what’s our mission?”

The parish had a mission statement that had been composed several years earlier. It was posted in a little frame in the entry of the church and on the bulletin cover. It wasn’t referred to that often and it was quite old. So we needed to revisit it. We went in and did that with the help of this facilitator. And as people told their stories and gathered some perspectives on what the parish was all about, we wrote up a new mission statement. Where were we, as Sacred Heart Parish, being called to live as a Church of Jesus right here and now in our unique setting?

That formed a backdrop. The end product is that we determined through prayer and discernment to form a charitable foundation with the money. And many people were actively involved in putting
forth suggestions about the kinds of grants that should be made. We finally decided on grants to
charity and to scholarships, and for work with youth and young adults in our parish setting.

Then the question arose, “How do we continue to do this collaborative atmosphere?” We didn’t
have a staff to speak of. There was only a director of religious education, a secretary, and a custodi-
an. For a parish of 2,200 households, that was a little thin.

So, we started to look at drawing more people into parish leadership in many different ways. I hired
a pastoral associate. Over time, others were added in faith formation, liturgy, music, and youth min-
istry. The challenge then became how to get this group of people to view themselves as a team—a
team where each member has unique responsibilities, brings different strengths to the table, and is
accountable, not only to one another but to the larger parish and to the Church for continuing its
mission.

We began by implementing weekly staff meetings and a couple of staff days of prayer and reflec-
tion, with the help of an outside facilitator who continues to work with us each year. Interestingly,
the question of accountability kept coming up, and that’s what I’ve been asked primarily to address
today.

We worked up an evaluation/accountability instrument for use within the parish team, but with
implications for the larger parish community. In other words, the community sees the staff being
held accountable. And that accountability is not just to the pastor, but also to the Church and to the
larger community.

I worked for a significant period of time in seminary ministry and knew enough to stay away from
the term evaluation. That really had a charge to it that was not all that welcome within Church min-
istry. So we looked at something we called a Performance Perspective, a way of helping people be
accountable for the work they were doing based on their job description as well as on the unique
gifts they brought.

We do a Performance Perspective with our staff once a year, and it works something like this. We
prepare an instrument with questions such as, “What do you perceive as this person’s strengths?”
“What do you perceive as their areas for growth?” “How would you describe their expertise in their
own area of ministry?” “How is their ability to listen and work within a larger community?”

Each staff member gets four of these sheets and is asked to give them to four people who would be
able to offer a perspective on the way they conduct their ministry within the parish—people they
work with on parish committees or people who have exposure in some way to their work. I am part
of this process as well. I give out sheets to four people who have a perspective on my ministry—the
director of religious education, the pastoral associate, the liturgical director, the secretary, or the
business manager. A couple of different things occur as all these forms are returned to either me or,
in the case of my reviews, to the administrative assistant in faith formation. They’re collated and
then delivered in a conversational way in one-on-one meetings I have with each staff member dur-
ing which we “listen” to what people are saying. What are their perspectives on how you and how I
do our ministries here? We literally go down each sheet and let a conversation ensue from these perspectives and the comments that are made. We are open to each other’s responses and to my commentary. It goes back and forth.

The Performance Perspective is extremely simple and I think it serves a good purpose within a group that is not used to doing something like this. At the end of the session, I work up a brief memo, a reflection on some of the points made, so that our people might then use those in working up goals for their ministries in the year ahead.

Accountability extends, of course, to us ourselves. We’re part of the leadership of the parish and to the degree that we exercise our ministry professionally . . . we will work better.

The instrument is valuable in many ways. One is in the area of accountability. As those of you who were at the National Ministry Seminar know, there was a strong call for accountability on the part of people in Church ministry and in leadership in the parish. There was this sense that as minister, I’m accountable to the Church and to the congregation, and that our director of religious education, our business manager, and our liturgical director are accountable to us. In a very real sense, we’re starting to ever-so-slightly adjust the perspectives of people on the life and ministry of the parish.

We are drawn together as a team. To be sure, we have a mission. Together, we are called to be accountable to the larger Church.

Accountability extends, of course, to us ourselves. We’re part of the leadership of the parish and to the degree that we exercise our ministry professionally, and with a certain accountability, we will work better. In addition to being accountable to the parish, we’re really accountable to one another. Are we all doing our part so that the weakest link doesn’t draw down the energy and direction of the rest of the staff? It also says that we’re a team, that we’re in this together. We each have this unique baptismal call, this spiritual perspective and framework, and that’s very helpful as we identify who we are and what we’re doing. We are drawn together as a team. To be sure, we have a mission. Together, we are called to be accountable to the larger Church.
I think the other important thing a process like this brings is a healthy tone to the ongoing personal, spiritual, and ministerial development of the individual. It represents an opportunity for them to hear not only challenge, but also some good affirmation.

To be able to hear somebody say, “You do a wonderful job” . . . is a tremendously enriching experience.

The truth is, we sometimes are not able to have the conversation about what might challenge somebody to work a little better or a little more effectively or efficiently. It may pop out at a moment of particular tension or stress, but good reflective conversation is often difficult in those moments. Our program provides an opportunity to look at the perspective of the larger parish and its mission and ask, “How well am I as pastor, or as pastoral associate, or as director of religious education, doing my part for the good of this larger mission?” Unfortunately, it is often not until people leave the parish that they ever have a focused opportunity to hear affirmation too such as, “You know, you were just wonderful, and I want to tell you about an incident where you were really helpful to me and to my family.”

To be able to hear somebody say, “You do a wonderful job,” or “You have some great communication gifts with people,” or “You show wonderful compassion,” is a tremendously enriching experience. When we want to talk about developing ministers and developing workers, I think this is an approach that really works well. And it is always development oriented.

As we move along year to year and reflect as a larger group or within individual settings about our ministry, I believe we must always see ourselves as on a journey. We must always see ourselves as moving forward, challenged to be more faithful, more compassionate, more Christ-like and more effective in fulfilling our mission.
Plenary Discussion Highlights

On good parish management…

Maggie McCarty:
I run a theological school for the laity in four Catholic dioceses called Education for Parish Service. We have about 2,700 graduates serving as volunteers, mostly in parishes, in the four dioceses that we serve. I want to speak specifically to some of the things that were said in terms of nonprofit association management.

My organization is one of the pilot programs for the Standards for Excellence. I’ve begun to implement into our nonprofits many of the things being discussed here about being mission focused and gathering strengths. We are using many of these same principles, not only in terms of good feedback for our staff and being mission-centered, but through this idea of engagement, because I’m convinced that if we, who are struggling like so many nonprofits are in terms of finances and the like, can create a sense of engagement or inclusion then it’s going to have a long-term effect on our organization. It’s not only in parish settings, but it has applications in terms of other institutions that serve the Church.

On reaching out to young adults…

Fr. Monk Malloy:
One of the great dilemmas we face is if people have a positive church experience in their college years, what do they do after they leave? Fr. Wall’s parish has been a Godsend, at least for Notre Dame grads. So I’d be interested in hearing his thoughts on this issue. Some have suggested that this age group, if they’re disengaged after they leave college, will sometimes become reengaged after they marry and have children. What kind of outreach did St. Pat’s have for that age group, since it’s such a decisive time in their lives in terms of who they meet and whether they marry other Catholics, and so on?
Fr. Wall:

We thought we were going to be a one-generational church experience, in a very intention-
al way, for young adults who traveled the highways and byways to get to our place. Immedi-
ately, however, it became multi-generational because who followed the young adults but their parents, and they would also travel. We had this kind of adult family moment, which is very interesting when the adults are kind of letting go of their own parish responsibilities. Their kids had grown up, and they were now footloose and fancy free and in their 50s. Young adults were coming along and they were footloose and fancy free. So we had this kind of wonderful experience that says a lot about church.

My perspective on young adults is that you really have to address their needs. And you can’t do it around mortgages and marriage. It has to be much more intentional around questions like, “Who am I?” “What am I doing?” “Who am I sharing life with?”

I think what’s happening in America, at least in the larger population places like Chicago, is that young adults have taken over the center of the city. We never had a young adult pro-
gram at Saint Pat’s because everybody is young adults. So it wasn’t this specialized ministry just for young adults. It became the Church life. People were taking responsibility for every-
thing. They were the people who were there and doing it.

I think dioceses ought to look at central cities. They ought to look at intentional churches for young adults who are willing to travel to them, especially around that young adult movement. The workplace is where young adults are. If you walk out of the office towers and you find the local watering holes, that’s where they are after work. We thought that once they got married, they would move out of the city, but they are not. They’re staying in the city.

And as a result, Catholic schools are booming in the center of the City of Chicago right now. We don’t have enough Catholic classrooms. That’s why we have to have a generational focus in our ministry, and it has to based around their concerns: Who am I? Who am I sharing a life with? What is driving me? What’s the mystery of God doing in me? And how can I express it as life for the world?

Leisa Anslinger:

I’d like to add something about our response when young adults say, “I want to be mar-
rried,” or “I have a child to be baptized.” Our response in those key moments makes or breaks a person’s life of faith in a lot of ways. There’s something very compelling about a community of people who are living their faith in vibrant ways. We’ve watched the medi-
an age of our community drop from 46 in 1999 to 34 right now. That’s not to say we don’t have a contingent of elderly folks and everything in between, but there’s something that’s drawing our young adults to communities where people are being asked to live their faith in wonderful ways.
On being financially accountable…

Barbara Anne Cusack:
The notion of accountability is critical. If the next major crisis breaks and we’re not being financially accountable in what we do at our parishes, if we don’t have processes to guarantee the best standards of internal controls, if we don’t have accountability with consequences for parish staff and pastors who deviate from the standards, then I’m afraid all of the work we have done will get washed away.

What I’m wondering is if this organization could serve as a network for dioceses that are looking for vehicles, like independent audits, to put in place to ensure the highest standards of financial accountability at the parish level. Quite frankly, the vast majority of parishes simply can’t afford that type of external audit. So we have to come up with another vehicle that can guarantee that the work being done to restore trust is not undermined.

On responding to a multicultural environment…

Fr. Richard Vega:
A challenge that we need to give serious consideration to is the multicultural environment. While in the Anglo world young adults may be 35, we need to recognize that Hispanics right now are anywhere from 18 to 30. That’s our young adult group. At the same time, many of them have totally different issues regarding money, regarding leadership, and even regarding the care of parishes. For example, lay ministers in Latin America and elsewhere have held the positions of authority and leadership for years, and we’re not making those transitions.

We’re really dealing with different structures, and I think as a national organization we need to respond to that. The Pew study has revealed that it’s not tomorrow that the Hispanics are arriving along with other national groups. They’re here today. It’s that element that we need to start attending to before they become part of religious groups other than our own.

We must recognize that Hispanics are much more sacramental. They’re not into mission statements and those kinds of things. I look at my brother priests in Los Angeles who would have nine weddings on a Saturday. I know one parish in our diocese that did 500 baptisms on a Sunday, after the Masses were done. I know that’s becoming the norm. So when you look at the numbers, it becomes an issue of survival just to get through the day. It is hard to have standards, it is hard to be mission oriented when you’re not in that mindset. Again, they’re all excellent elements and I know the brothers and the sisters would love to get there, but that’s not where they’re at today. What’s hard is that you’ve got to balance what we’re saying here with the new realities that are impacting the Church in a total different way.
On the need for leadership skills…

Participant:
I think the real challenge for the Catholic Church and for the Leadership Roundtable is to develop ways in which we can produce more Fr. Walls and Fr. Donnellys. Here we have two individuals who stepped in and have run very successful parishes without the benefit of some of the tools we’re now developing.

You don’t go into the kind of area that Fr. Wall did in Chicago to produce the kind of results he did with just basic management skills. There’s a leadership component involved that I think is extremely important. We use the word leadership frequently, but we have to keep it in the forefront of what we do because all of the systems we’ve developed are not going to be as successful as we’d like them to be unless we are able to help the Church develop real leadership skills in its ranks.

On effective stewardship and clergy education…

Participant:
I would say that what makes sense is to have a very clear and focused stewardship perspective around everything regarding fundraising and the principles applied to good financial management. I believe that the perspective of stewardship is the spirituality out of which a vibrant parish can and will develop. If it’s simply good practices born of a largely a secular model that doesn’t have the element of stewardship in it, either for finances or for developing the talents of the parish community, then I don’t think it’s going to have the results we want for the Church.

Finally, in terms of clergy education, my experience is that 20 percent of the clergy doesn’t need any help. That’s the talented, eager group that will go to a workshop or go online and take a course. Then there’s the 20 percent you couldn’t move if you put an atom bomb under them. They were referred to in clergy ed as “China eggs.” You could sit on them forever but they would never hatch. The middle 60 percent, however, is the group that needs clergy education at the local level with the right encouragement and the right learning programs. Unfortunately, we have fewer and fewer people devoting time to clergy education. Whatever you can do to support that at a local or diocesan level, it will have multiple benefits for that middle 60 percent who are not natural-born leaders, but can learn great skills and develop a great deal of what’s been talked about here so very well.
Challenges and Solutions in Church Strategic Planning

Panel

Ms. Betsy Bliss (Moderator)
Most Rev. Alfred C. Hughes
Sr. Katarina Schuth

Archbishop Hughes

Let me begin by expressing my great appreciation for the invitation to come here today. Let me also express my appreciation for the pro bono assistance that has been rendered by the Leadership Roundtable to the Archdiocese of New Orleans in a way that has been very respectful of the pastors, the principals, and the central administration of the archdiocese. They have helped us to develop a responsible approach to a new venture on our part in the devastated areas of the archdiocese to launch central schools where we had multiple schools that are not yet able to reopen.

I am also delighted in the gift that the Leadership Roundtable makes available in the collation and promotion of best practices in so many areas of Church governance.

First of all, let’s look at some of the challenges that we faced because of Hurricane Katrina, and what we attempted to do, solution-wise, to address them. Second, I would like to focus on the issues in the reconfiguration of the archdiocese that is a more long-term effort in planning that we’re engaged in.

With regard to the Katrina-related challenges and solutions, 80 percent of the city was flooded for three-and-a-half weeks. When the water subsided, it was like a war zone. No vegetation, no birds, no life. Two thousand people died. At least 150,000 homes were severely damaged. Over 500,000 people were scattered through either voluntary or involuntary evacuation.
There was very little, if any, communication possible. Cell phones would not work. Ordinary landlines would not work. Anything in the 504 area code would not work. We had an extraordinary challenge in contacting one another. Our main source of knowledge about what was happening until we could get firsthand experience was through the media. We lost two of our archdiocesan administration buildings, one for six months and one for eight months.

The humanitarian needs were overpowering: food, clothing, shelter, and healthcare. The pastoral needs were a very special challenge to faith because of the overwhelming losses people had suffered to their homes, loved ones, schools, jobs, and because of the moral chaos that followed the hurricane. The educational needs were also great. Families would not consider returning unless there was an opportunity for the children to be in school. There was also an exacerbation of racial tensions in all that we went through.

What did we try to do? Well, I came from Baton Rouge when I moved to New Orleans. I knew the central administration there. Bishop Muench, who is now the Bishop of Baton Rouge, had been a priest and the vicar general in the Archdiocese of New Orleans. I think God providentially prepared us for a profound collaboration that took place between the two dioceses. Within 48 hours we were able to set up in Baton Rouge an administration in exile using the very offices of the central administration of Baton Rouge, and the people that we could find and bring together operating out of their counterparts’ offices in Baton Rouge.

We established in the area of the archdiocese 12 strategically located community centers for humanitarian relief. We were able to set up a new food bank in Baton Rouge within four days. We had rescued our trucks, but we lost our food, our bank, and our buildings for storage. In the first four months, 40 million pounds of food were delivered. We were the main agency for getting food to local church groups and nonprofits who, in turn, distributed it directly to the people. We missioned priests to the surrounding dioceses because there were 10 surrounding dioceses that had received significant numbers of forced evacuees into major shelters: Baton Rouge, Alexandria, Shreveport, Lafayette, Lake Charles, Houston and Austin and Dallas, Texas; Jackson, Mississippi; and Atlanta, Georgia. We gave a priest to the local bishop to work in those first couple of weeks to make sure that the poorest of the poor were receiving pastoral care in those shelters.

The people in the shelters craved to know that God cared, even as they were beginning to receive food and clothing in this temporary shelter. The surrounding dioceses that welcomed and assisted the people who were evacuated underwent an extraordinary experience. The public school system in New Orleans announced it would not reopen any school for the entire year.

We took up the challenge and began reopening Catholic schools one at a time, beginning with the Cathedral School. We opened our doors to every student, whether they had been in a Catholic school or not, whether they were Catholic or not. We went on the boats on the Mississippi River where the rescue workers and their families were being housed, invited them to send their children to our schools. By the end of October, two months after the storm, we were able to document that
95 percent of our schoolchildren were back in a Catholic school someplace, a number of them in other dioceses or in other schools in our own archdiocese away from the areas that were most devastated. Moreover, we received some 3,000 students who had not previously been in Catholic schools.

We now have a new communication network, with our cell phones now based in Atlanta. We figured that if another storm hits us, it’s not going to be in Georgia. With the assistance of the Shreveport diocese, we set up a backup for our computer data in Monroe, Louisiana. Recovery was one of our great challenges. People had literally to swim into buildings to recover our computer material backup so that we would be able to continue our administrative work. In connection with the racial issues, I have issued a pastoral letter entitled “Made in the Image and Likeness of God: A Pastoral Letter on Racial Harmony,” which is now being studied in each of the parishes and in each of the schools. There is a series of action items for central administration, for parishes, for schools, and for individual Catholics to look at and hopefully embrace.

That was the experience immediately post-Katrina. We are now involved in a reconfiguring of the archdiocese because of the number of people we currently have, the shifts in where people are living, the conditions of the remaining buildings, and the decline in the number of active priests post-Katrina.

One of the great things that I invited pastors to enter into was to see themselves as pastors of virtual parishes . . .

I’d like to go back to the immediate Katrina response for a moment. One of the great things that I invited pastors to enter into was to see themselves as pastors of virtual parishes, and to try to make contact with as many of their parishioners as possible wherever they were. Most of this happened through e-mail and through personal information brought to them by fellow parishioners. I asked them to go where there were pockets of them and actually visit and bring back to us their needs. Those pastors who did that had the highest percentage of returning parishioners because they wanted to go back to a live and caring community.

We are now involved in the reconfiguration of the archdiocese. The gradual return of parishioners has risen from 60 percent at the end of the first year to what we currently estimate to be 82 percent. But we have a proportionate loss of income, not only in the parish level but on the archdiocesan level. We experienced a $286 million loss in Church-owned property; approximately $100 million of that was covered by insurance. Additionally, approximately $40 million has been made available by way of gifts from other dioceses and from individuals to assist us in the work of reconstruction. Approximately $37 million has been made available by FEMA for schools. That leaves us with about $100 million in uncovered losses. So we have had to make some very difficult decisions.
We began with a third cutback in central administration at the end of October 2005. We have moved into a gradual restoration of personnel as greater revenue has come in. But we are certainly not back to where we were pre-Katrina. We entered into what we now call pastoral planning rather than strategic planning. We had done an extensive project of strategic planning before Katrina. In the first year following the hurricane, we entered into Stage One, and we have just completed Stage Two. The planning for Stage One took place between November 2005 and March 2006, and was implemented as of July 2006. This planning took place in the 7 of the 12 deaneries (deaneries are clusters of parishes) that were most devastated by the storm. The criteria we used were that, in order to reopen a parish or a school, at least 50 percent viability in terms of parishioner return had to be established by the end of June. We also asked the deaneries to look at the condition of the buildings and make sure that there was appropriate provision being made for the African, Latino, and Asian Catholic communities.

The conclusion of that Stage One process came from the deaneries themselves. We ended up announcing that we were closing 7 parishes—parishes that even pre-Katrina were doubtful in their viability. We postponed the reopening of 20 parishes and expanded the territory of those we were reopening to cover the area. We reopened 86 of 106 schools by December 31st of that first year following the hurricane. In postponing the reopening of 20 schools, we established 7 central schools to cover the same territory originally covered by those 20 schools. It is in this effort that the Leadership Roundtable has been especially helpful to us. Stage Two of the pastoral planning took place during this past year. We began in September and announced the results in April. This involved the whole archdiocese. We asked a committee to sit down and develop criteria for vitality of an individual parish.

That vitality index was then sent to each pastor, and he was asked, together with his parish pastoral council, to do a review of his parish in light of those criteria and to send a report to the dean. The next step was to bring together the parishes, the pastors, and the parish leadership of each deanery to come up with a deanery plan that not only respected the vitality of individual parishes, but recognized that we were going to have to distribute assignments of priests in light of the demographic changes that had taken place post-Katrina and the decline in the number of priests available. We asked the deaneries to submit their plans by the end of December, which were reviewed for fairness and consistency by the Council of Deans. The Council then came up with the first draft of an archdiocesan plan that was brought to the administrative council of the archdiocese, then to the presbyteral council, then to the archdiocesan finance council.

The school office was asked to review the applications to the schools and the possible need to reopen further schools. The school office discovered that the central schools (covering the areas where the schools were not yet reopened) still had 750 seats available. So they did not recommend at that time the reopening of any further schools. In addition to the various consultative bodies that I mentioned, I also brought the first draft to the major superiors of women and men who serve in the archdiocese for their review and recommendation.

After these consultative bodies had a chance to look at the first draft, we brought all of their recommendations back to the Council of Deans. In light of those recommendations and the view of the
Council of Deans, a second draft was developed. This went back through the same consultative process, except we did not call in the major superiors, many of whom live outside the archdiocese.

Further consultations were brought back to the Council of Deans a third time, and then presented to me. The conclusion of that process led to our leaving 108 parishes as they are currently constituted. Twenty-five parishes will close and merge by December 31, 2008. Two parishes, because of special circumstances, will close and merge by June 30, 2009. Four parishes will become missions. Four combinations of two parishes will share a pastor. Two parishes will cease to be parishes (they are on campuses) but will continue as campus ministry centers. We are reopening two parishes and creating a new parish.

I made a commitment in the name of the archdiocese that all net assets belonging to parishes being closed would go to the parish with which they were being merged. I say “net assets” because the second part of the commitment is that the archdiocese is responsible for managing all the buildings in closed parishes or schools, and will absorb any debts but then deduct the cost if or when those buildings are leased or sold. That’s on a parish-to-parish basis.

A very important piece of this is the implementation plan. Obviously, no parish was going to recommend that it be closed. That decision had to be made centrally with the best data possible. The implementation plan involved the two auxiliary bishops and me visiting each of the now-open parishes that had been scheduled for closing. Those were not easy experiences.

A facilitator has been assigned to each parish being closed or merged to walk the people through an understanding of the plan, to have a town meeting so that their concerns and fears and anxieties could be aired, and then to elect leadership that will work together. With the help of a facilitator, the plan was to develop a series of recommendations about the way in which they wanted to build on the strengths of each of the parishes being merged, minimize the weaknesses in the parishes being merged, and determine the way in which they wanted to constitute their pastoral parish council and even change their name. They could either use the name of the church they were going to worship in or choose a new name. All of this then comes to me. If there are serious differences of opinion, majority and minority opinions are presented to me for a decision. The ultimate target date for most of the mergers is December 31, 2008.

Surprises? Yes. In the first stage of development, one of the parishes slated for closing was occupied. They went on the Internet and got not only national but international support. It became a racial issue. So what we ended up doing was to try to bring the members of the parish leadership back to the issues that had led to the decision to close the parish, and identified 11 benchmarks. We have given them a year to meet those benchmarks. If they meet them, they will remain open. If they don’t, they will close.

A second surprise was not really a surprise. The pastors did an uneven job of acquainting people with the process and undertaking a self-study. To the extent that this was not done well, there is less understanding and acceptance of the plan. I did send a letter to all of the parishes. It’s the first time I asked for a letter to be read at all the Masses on the weekend before the pastoral plan was
promulgated, trying to help the people understand the process that we have been through without anticipating what was going to be announced during the following weeks.

A third difficulty in the process was the uneven job the deaneries did in assuming their responsibilities, and our need at the Council of Deans level to address consistency and fairness issues. Because of that unevenness, one particular deanery has a couple of parishes that have developed organized resistance to the decision of those two parishes to be merged. As a result, the implementation plan is moving along in a very difficult way, and my expectation is that there will probably be appeals. We will have to go through the usual canonical process.

The most important factor . . . has been having the right people in key positions.

I have one last statement by way of conclusion. The most important factor in addressing the challenges that we have faced and trying to develop solutions has been having the right people in key positions because of their competence, because of their faith and spirituality, and because of their concern for the wider good in the Church and the community. I believe that has made the difference between Church and the wider community in addressing a number of the post-Katrina issues that we have had to face.

I will conclude with a story. I’m reminded of it because I ran into General [Russell] Honoré in the airport. General Honoré was the man responsible for restoring order in New Orleans following the hurricane. He was responsible for bringing the 82nd Airborne in. I never knew it before, but there’s a custom for the 82nd Airborne to do some symbolic project wherever they go to create goodwill about their presence and their mission.

Unbeknownst to me, they chose the garden behind the cathedral. It was one of the areas that had not flooded. The French knew what they were doing when they located the cathedral and their initial settlement on the highest ground. But all kinds of trees and bushes had been destroyed. One tree had broken off the fingers on a hand of a huge Sacred Heart statue. Well, they cleaned up the garden and found the fingers that had been broken off. They knew that Archbishop Hannan, not my immediate predecessor but two predecessors ago, was still living and active. He celebrated his 95th birthday last month. They presented the fingers to him, because he had served as chaplain of the 82nd Airborne during World War II.

When we reopened the cathedral two months after the storm, it was packed. At the end, I lifted up the fingers and said, “You know, the Sacred Heart statue is a symbol of God’s faithful love for us. I will reattach these fingers only after we become the hand that the Lord Jesus is asking us to be, cooperating with his grace in the restoration of the Church and the archdiocese.”
The implications of these changes . . . have not yet been fully appreciated or absorbed by the Church.

Sr. Katarina Schuth

I appreciate very much the honor of being able to speak with you this afternoon. The Leadership Roundtable’s work is enormously important for the Church. What you are trying to do with meetings like this I think is extremely helpful. We need only look at the recent news stories and statistics to know that parish structures are changing at unprecedented paces and rates. Archbishop Hughes’ story tells us sometimes they change at a pace and rate that we never expect.

The implications of these changes, generally in terms of the closure or merging of parishes, the development of mega-parishes, and the reconfiguration into multiple parish clusters, have not yet been fully appreciated or absorbed by the Church. Parishioners are affected very directly, and priests and lay ministers serving in these circumstances are also affected with almost the same kind of directness.

These millions of Roman Catholics are more or less forced to adjust. Slightly removed from these immediate situations are diocesan offices and officers, seminaries, faculty and students, and bishops and their staffs. Each of these groups is critically important to the effective operation of parishes. This is where the work of the Leadership Roundtable can really come in and be a great help to the adjustments that are happening, almost daily, in the Church.

. . . focus especially on how this ministry can be enhanced with special attention to the role of bishops. Planning, leading, and managing these parishes will make all the difference for the future.

Today I would like to do three things: first, to provide an overview of the present state of affairs as they relate to multiple parishes, regional differences, and so on; then to say a few words about priests who serve and their ongoing needs for education; and then focus especially on how this ministry can be enhanced with special attention to the role of bishops. Planning, leading, and managing these parishes will make all the difference for the future. All of this is based on recent research that I did and published in the book Priestly Minister in Multiple Parishes.
It includes interviews with about 100 priests, surveys of over 900, and interviews with about 15 bishops. I used the directories of virtually every diocese in the United States. When they weren’t available, I used the official Catholic Directory. I think everyone has been counted.

There are 20 million more Catholics now than there were in 1965 (between 1965 and 2005), 15,000 fewer priests, but a virtually identical number of parishes and missions. So here we are obviously with very new configurations. What does the multiple parish situation look like when we talk about regional differences? Using the USCCB regions, this shows the very great variation. The West and the Northeast on the whole are better off than the large Midwest and South in terms of numbers.

When we go state by state, we get a slightly different pattern. The Northeast, which looked as though it had plenty of priests, lacks in number in such states as Vermont and Maine. Some places that otherwise looked a little bit bleak are not quite so bad when we look state by state. Even more mottled is the pattern when we look at it by diocese by diocese. In parts of Minnesota and Missouri and a few other places there is a relative abundance of priests. Not really an abundance, but more than in other places. Many other surrounding dioceses are the worst off in the whole country.

There is very little sharing of priests. Of the thousand or so priests that were involved, only a few of them said that they had moved from one diocese to another in order to help out because there was a need for priests. In 2005, 44 percent of the parishes were served by priests who have more than one parish. This is Roman Rite as opposed to the earlier number which was all parishes, including the Eastern Catholic Churches.

I know by now that well over half of parishes are served by priests who have more than one parish. I know that because places I’ve visited, such as Camden, Portland, Maine; Saint Paul; Manchester, New Hampshire; Cincinnati—all of them have reported to me within the past year when I gave workshops tremendous change toward multiple parishes. Twenty percent of priests are serving in this fashion. The total number of priests is 4,400, again, in 2005, serving those 9,000-and-some parishes. Most serve two parishes, but now the tendency is more toward three, four, and even up to seven or eight parishes for one priest.

Have they received preparation for this multiple parish service? No. Ten percent have received some kind of preparation; that is, 10 percent of those who answered the survey. Of course, many of them have been doing this for a number of years. They were doing it long before the idea of continuing education was being handled as well as it is today with the National Association for Continuing Education of Roman Catholic Clergy (NOCERCC) and other opportunities.

What about the ages of priests? One fourth of them are 66 or older. It’s a fairly older population compared to the total of priests. But still, that is going to affect how long they can serve. They have to travel enormous distances. These older priests are finding it more and more difficult. About 18 percent travel 100 miles or less. They are largely in urban areas, and then it spreads out.

Twenty-three percent travel more than 1,000 miles. Some people say to me, “Why don’t they just close those parishes?” Well, those are the very parishes that are so far apart that if they did not exist,
the Catholic Church would no longer exist for perhaps 100 miles or more. So there is no easy solution to that dilemma.

Do the priests receive the kind of help in ministry they need? The help that they gain from other priests is enormous. The support group and the way that they are able to fill in for each other are tremendous. Almost 88 percent said they either receive a moderate or a great amount of help from other priests. Their relationships with each other are what sustain them to a very great extent, plus their ministry.

The amount of help they received from bishops is also considerable, but somewhat less than it is from the priests. That is not to blame bishops. It depends so much on the size of the diocese, their bishop’s familiarity with the diocese, and other responsibilities that he might have. Most of the priests wish the bishops were more involved.

They feel that the priesthood is greatly respected. The interesting thing about this is that 97 percent basically feel that the priesthood is respected. They themselves feel greatly respected. Many of them commented that, while they feel respected, they feel there’s been a tremendous diminishment of priesthood over the last 10 years or so. Yet they’re also very much appreciated by parishioners, to the extent that 96 percent feel their parishioners honor them greatly. Would they choose priesthood again? Yes, almost 90 percent said probably yes or definitely yes. This figure is much higher than it is for other professions. The love of the ministry of these priests that was expressed in these surveys was a great boost to my morale and I think should make us very proud of the priests who serve in this way.

But that’s not the end of the story, unfortunately. We look at the length of service. I mentioned the priests’ ages before—quite a number, about a fourth, are over 66. How much longer can they serve? Of those who answered, a little over a fourth said less than five years. Then there was that category of “Other.” “Others” said that they could serve between five and fifteen years more. But in this “Other” category, about half of them will definitely not be serving. So that’s about another 8 percent.

**Expected length of service**

<table>
<thead>
<tr>
<th>Length of Service</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Less than 5 years</td>
<td>26%</td>
</tr>
<tr>
<td>5–9 years</td>
<td>20%</td>
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<tr>
<td>10–14 years</td>
<td>18%</td>
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<tr>
<td>15+ years</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>16%</td>
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Note: Rounding does not equal 100%
A third of these priests cannot serve for more than five more years. Why can’t they serve in this kind of situation? They feel they will simply be burned out from the travel that they have to do, from the multiple responsibilities, and so on. The bottom line is some of them may or may not be able to serve. There are a variety of things that are part of that. What do they need to be able to continue to be effective? I think what they identified were really these mission-centered needs that they have to be good stewards, to draw people out, to engage them, and to make their churches really be places of worship where Christ becomes the center of people’s lives.

So, among the things that they said, the highest priorities from those most mentioned, what do they want? They want help with building communities that are inviting and thriving. They want people to be able to encounter Christ in the parishes where they serve. They want to be able to offer pastoral care to the un-churched. I was very surprised at that. There were about 20 options in the survey for continuing education priorities and they could write in their own options as well.

Including those Catholics who are no longer practicing is something that’s of great concern to priests. How can they get people to be more participative in the church? Their third concern was about ensuring that religious education would be effective in their parish, about helping people apply the word of God in their daily lives, and about identifying and encouraging gifts of the community and resolving conflicts. All of these things point to a care and concern for the mission of the Church that is exactly where it should be.

**High Priorities for Continuing Education**

- Building communities that are inviting and thriving
- Offering pastoral care to the unchurched
- Ensuring that the religious education program is effective in each parish

You’ll notice that among these priorities you do not find much about management. I had all kinds of opportunities for them to select those particular areas. I also am able to separate all this out by age. The younger priests were the ones who really wanted more information and help with various areas of managing personnel, hiring and firing, keeping track of books, and finances.

The priests who have been in office for a longer time do not find that to be quite as great a need. The priests identified a number of things that they had to do to be able to sustain themselves. I’m not going to spend much time on this because I wanted to focus more on the role of bishops at that leadership level. What the priests are saying is that a great parish involves a combination of leadership and management. They need to take time to pray, exercise, and relax.

This came up as the priests’ number one issue. I think all of them were exhausted by the time they got to this point in the questionnaire, perhaps. But at any rate, they do feel this is absolutely essential to sustaining themselves. Some of the priests who are 30 years old talk about serving the Church
for the next 40 years. That is quite a task to think about. The second most important issue for priests is to delegate appropriate responsibilities.

The problem, of course, is that only two thirds of these parishes have any staff members. Of that, two thirds to about half have only part-time people working for them. So they just simply don’t have anyone to delegate to. However, the one third that have volunteers only would like more help with that particular way of focusing the ministry, too. They would like to focus their time and attention more on priestly ministry. This morning, Fred Gluck spoke about priests having to manage. There are certain aspects of the volunteers’ work that the priests have to be at least able to supervise. Most of them would like to be able to give more time and attention to what is strictly priestly ministry in terms of sacramental ministry and spiritual ministry.

That is going to be in the future because these priests are going to three or four different parishes doing the spiritual work. They do not have a lot of time left over. They feel it’s necessary to regulate the expectations of parishioners. That might sound very negative, but what they’re really talking about is that the parishioners are used to having their own pastor. And that they want to keep their own pastor to themselves.

There is a great deal of competition for the priest’s time from the multiple parishes he is serving. This causes conflict and stress for the priests because they can never do quite enough for the people that they’re serving. This is where I wanted to spend a little bit more time—on the actions to be taken by bishops. There are three areas: provide personal and ministerial support, understand multiple parish ministry, and demonstrate leadership and planning. These main points were brought out very well this morning in Fred Gluck’s ideas about leading and managing because they involve all three things.

Here is another way of looking at this in a little more detail. I was astounded by the number of priests who said they are sent to these more remote parishes, and that’s the last they hear from the central offices. They really want encouragement, prayers, calls, visits, even a phone call—and not just when there’s a problem. They need affirmation, and some recognition. They need to be appreciated, to be trusted, and to be shown that the central offices have confidence in them. They need to be shown someone cares. There needs to be concern for priests’ well-being, and help for handling stress rather than just being told to “buck up and do your job.”

...a lot of priests complained that their bishops came from urban areas and that they were too urban chancery bound. ...So the remote parishes were left to fend for themselves in many cases.

I was once giving a talk to a number of Church leaders. I mentioned this idea of the need for this list. The idea was, “Well, that’s sort of a women’s thing.” We are really wrong about that. If we wonder
why we don’t have more priests, we can think about that a little bit. Everybody needs affirmation in
these kinds of things. We need a lot more help in seeing that happen.

In becoming acquainted with the whole diocese, a lot of priests complained that their bishops came
from urban areas and that they were too urban chancery bound and had too many other responsi-
bilities, were too eager to get out of the diocese where they were assigned. So the remote parishes
were left to fend for themselves in many cases.

We need to establish workload boundaries and then reduce excessive demands and extra jobs.
Forty-two percent of these priests—I’m talking about priests with two, three, four or more parish-
es—42 percent had another job that took at least a third of their time. This included everything
from chancery to teaching to all kinds of different things, responsibilities to religious communities,
too. Let me go back to financial assistance and other resources. Dioceses, of course, need money.
Everybody needs money. But a lot of these small places feel that their existence depends on their
money. The priests are feeling really bad about this because 100 people can’t support a full parish.
Yet if they do not have that parish, there will be no Catholic Church for perhaps 100 miles.

Forty-three percent of the parishes that I surveyed have fewer than 100 families. About close to half
of the parishes do not have very many people, yet are very much needed. Obviously some can be
closed, but there are many that simply cannot. These priests also want bishops to promote the voca-
tional call of the laity and lay ministers by helping to educate them.

Leadership and planning. This is something that the priests really want done very much, to set in
motion an intelligible planning process, one that creates a clear vision and that would adopt appro-
priate policies. For example, clarity of roles. When someone is serving in some of the lay ministries,
the pastor is always called by the chancery offices rather than calling the person who is in charge of
that area. That was a large complaint. The things I’m mentioning are ones that occurred over and
over again. We need to then develop suitable structures and structures that, in several ways, are
combining parishes appropriately and paying attention to what the local people would say about
which ones would work best together.

Then the priests suggested that we need to have structures in offices where the people working in
them have some sense of what multiple parish ministry is, so that they can answer questions about
these particular situations. Then there were a lot of suggestions around establishing a diocesan
office or two to cover the basic functions—for example, plant oversight or reporting functions that
could be done remotely by computer and could be very helpful in the ministry. Then, finally, there
is a need to use broad consultation in every phase.

... “Let’s face it. We’re living with the death of rural America.” This is
affecting the Church deeply. It’s affecting vocations deeply.
Some things are simply difficult to address. There is no way of getting around them. One of them is the small size of parishes in the diminishing rural population in many dioceses. One priest wrote, “Let’s face it. We’re living with the death of rural America.” This is affecting the Church deeply. It’s affecting vocations deeply. In the past, the proportion of priests coming from rural areas was way outnumbered by the number of people. We are losing that.

The distances between parishes cannot be reduced. It takes time to travel from place to place. It means that services need to be duplicated. You cannot simply say, “Everybody come to thus and such a place,” though sometimes they do travel that far to go to Wal-Mart or K-Mart or Target. I have to give the Minnesota company, Target, a little plug. The demands of serving more than one parish and the inevitability of assigning more priests to this form of ministry, this is difficult and there’s no way of overcoming the problem.

I have a lot of faith that we are going to come through this somehow. But we really need some help, and we really need to reframe our thinking about the way we treat people and about the way we organize situations.

Finally we come to the diminishing resources of the Church, human and financial, to respond to the situations where there is great need for both. Here again, the Leadership Roundtable comes into effect. We need to use the resources that we have and all those ways as effectively as possible. This information is all found in my book Priestly Ministries in Multiple Parishes. The challenge is to respond in a way that shows that we really do have a lot of faith. I have a lot of faith that we are going to come through this somehow. But we really need some help, and we really need to reframe our thinking about the way we treat people and about the way we organize situations. We have talked about people and then ideas. There need to be some new ideas. Then we will meet needs that are coming up in the future. The uniqueness of so many situations makes this very difficult, but it’s a challenge I think we are up to.
Plenary Discussion Highlights

Fr. Richard Vega:
I wonder if there’s a disconnect between the data you gather and the priests’ lives themselves. I know that what was listed up there is the want for more time for prayer, more time for relaxing. Yet we know that “no” is not a word that is in most priests’ vocabulary. They will not take their days off. They will not go to the annual retreats, and they will not avail themselves to the continuing education. So while we may say that, what I find across the country is the complaints either from brother priests or from parishioners themselves that they are not doing that.

The other piece, too, is that my brother priests are unwilling to give up the power. There was talk about vocational call to the laity. Yet some, especially those that operate out of a strong cultic mentality, will say that but do not invite others to share in the baptismal gifts and talents of the laity. I’m just wondering if you see one thing in the data and see something else in actual people’s lives?

Sr. Katarina Schuth:
Actually, because of limited time, I presented almost nothing about priests. That is a whole two-, three-hour thing. Priests do not take the time to do the things you are saying, but they believe it is an action they need to take. That was named “actions to be taken.” It was not actions that we actually do take. That is why there needs to be some help that way.

About the giving up of the power, it is very interesting to do age profiles here. On computers you can divide it all up. We found that the younger the priest, the less likely he is to want to share. They want to do it all themselves. They want to work 24 hours a day. They fit the model you are describing. The older the priests get, the more realistic they become and I think, frankly, the more spiritual they become, at least in some ways of describing spirituality. They are willing to share, to give up something. That really is the kind of crucifixion for these younger priests. We have a new population of seminarians, without a doubt. We know this from Dean Hoge’s studies. They are not for sharing power by and large. Obviously there are always exceptions. It is a huge problem.
Fr. John Wall:
How many priests are you actually talking about that are in multiple parishes across the country? Second, is there a great population that includes Hispanics in rural America that is part of the Catholic Church?

Sr. Katarina Schuth:
There are at least 4,400 priests with multiple parishes. That was the real number of every diocese in the United States in 2005. I know it’s now well over 5,000, just from the few dioceses that I know have made the changes that they made. There is a whole section on Hispanics.

Many of the priests mentioned that it is not like having two parishes. It is like having four parishes because in so many of these rural areas, half the parish is Hispanic. Trying to get them to blend together and so on is really hard. Bishop Steib used the term “a parish within a parish.” There was a lot of talk about that. It is a whole big topic that I could not go into today but, yes, it is definitely there without a doubt.

Fr. Bill Byron:
I have a friendly amendment, or you might say an editorial suggestion. I have had it in mind but when Jack Wall spoke I think he is a good example. On your actions to be taken by priests, where you said “focus time and attention on priestly ministry,” I think you want to say “pastoral ministry.” Many times over the years I was doing administration and noticed the word “ministry” is in “administration.” People would say, “Don’t you wish you could be doing priestly work?” And I said, “Well, I think I am doing priestly work.” I said, “I think the pope does priestly work when he’s sitting at the desk.” Jack Wall, for instance, is doing priestly work running the Extension Society just as much as he was doing priestly work when he was pastor at Old Saint Pat’s. He may want to do more pastoral work and may have the heart to do pastoral work. But when people perceive you not to be doing priestly work when you’re in administration, it means that they, and probably some of your seminarians, have a deficient idea of what priesthood is.

Sr. Katarina Schuth:
You are absolutely right. But the way these priests describe it, and I am using their language, they are talking about mainly sacramental ministry. The fact is that they are becoming circuit riders. They are going from place to place doing the sacramental ministry. A lot of the pastoral ministry is either not done at all or it’s being done by other people, but I know you are right. It’s probably laid out in the book a little bit better but it’s the words that they use. What they are using to describe it is what I just said.
Geoff Boisi:

Has there been anybody you retained to sit down and methodically go through this from an analytical standpoint, and breaking down the different functions that are needed? In our secular parlance, this is something that would be a Six Sigma management consultant kind of analysis. Has that been done by any group?

Sr. Katarina Schuth:

Yes, actually, for one thing the emerging ministries have done a lot of that. Mark Mogilka has done a lot. Just yesterday I received a book from the National Catholic Educational Association that lays out the wonderful expression of all of the different kinds of ministries and what it takes to prepare for them. It is the best thing I have seen so far. I haven’t really had a chance to study it much yet. But it is sort of in workbook fashion. It is going to be great to use in seminaries. Priests will be able to use it in a way and parish ministries, too.

It does what I think you are talking about, all the difference functions and what the preparation is needed for them and what can be done this way and that way and so on. It’s really a good book: [In Fulfillment of Their Mission].

Geoff Boisi:

Is there a diagnostic to help either consolidate functions or figure out things like that?

Mark Mogilka:

Yes, I was fortunate to be able to share a consultative process with the Conference for Pastoral Planners and Council Developers and the National Federation of Priest Councils, which did a great deal of work complementary to Sr. Katarina’s, which brought together some of the best experts in the country for a symposium, which then also came out and developed and piloted various training programs with pastors and parish staff. There are six different models that we have developed all with advantages and disadvantages of ways of managing and organizing, and staffing multiple parish situations.

We are continuing to work with the Emerging Models of Pastoral Leadership group to get a second Lilly grant. I am co-authoring a book. The first draft is going to be published next week. It will be published by Loyola Press. We are not sure how that will unfold. There has been a lot of work, and there are some resources and models to this system of training. There is also the website [www.emergingmodels.org] for the Emerging Models where you can download symposium findings, the training programs, and other resources.
Sr. Katarina Schuth:

There are wonderful national resources. What are missing are the diocesan resources. I have gone to a dozen or more dioceses in the last year with this work and two or three days with sometimes just priests, and sometimes with priests and lay ministers. It is a wonderful way of working with them. They come up with all kinds of things using the national resources but applying it to themselves. A lot more help is needed with that kind of work.

You can’t just pick up a model about the uniqueness a diocese makes. It has to be developed with them. They need a facilitator or a consultant to do that. That is wonderful work to be able to do. I cannot go to every diocese and neither can Mark. But among us, we try to get to quite a few different ones.

Participant:

Sr. Katarina, could you say something about the phenomenon of non-ordained people leading parishes in the United States? I know that the number peaked two years ago and it is now on the decline. Did bishops or the priests you talked to speak to that reality?

Sr. Katarina Schuth:

Yes, most of them would love to have a person in the parish who would be a full-time administrator if they have two or three parishes. The problem with many of these is that at least half that are so small, they simply cannot afford it. Sometimes the younger priests especially do not want it to work. They would rather do it themselves.
Making It Happen
Keynote Address

Mr. Larry Bossidy, Retired Chairman & CEO, Honeywell International

As I was arriving last night, I saw a number of priests and it reminded me of a story. I had a priest friend who made movie documentaries. One day he was told that one of his documentaries had won an award, and he was asked if he would come to Hollywood to receive it. He was overjoyed by the prospect, and ventured to Hollywood.

On the way to the hotel, he was stopped in his clerical garb by a young man. The man asked him, “Are you a priest?” and my friend acknowledged that he was. He was then asked, “Well, what do priests believe in?” He replied, “Different things, but my order believes in poverty, chastity and obedience. Poverty: we live the simple life. Chastity: we give all our love to the Lord. And obedience: we obey the laws of the Lord.”

The young man nodded humbly, and went on his way.

My friend went to this opulent hotel and was seated at the head table with the best crystal and china. Just as he was about to partake of an hors d’oeuvre, there was a tap on his shoulder. He looked around. It was the young man. The fellow said, “Father, if this is poverty, I’d love to meet chastity.”

I am here this morning thanks to the insistent push of my daughter, Lynn. I’m glad she did, in fact, urge me to come, because I’ve looked more in depth into what’s been going on, and I think there has never been a better time for an organization such as yours to take the position that you have within the Church.

My credentials, by comparison, are relatively flimsy. I am the chairman of the board of the Cathedral Cluster, which is six bankrupt Catholic schools in Bridgeport, Connecticut. But we’re making some progress. We’ve increased attendance every year, and our test grades have gone up immeasurably. To
give you an idea of the composition of these schools, Mass is said in six languages at St. Augustine’s in Bridgeport on Sundays. The school’s composition includes Hispanics and African Americans, and a quarter of its students are not Catholic. They are wonderful youngsters, and it’s been very fulfilling for me.

With that as a little background, I’d like to set some parameters for my remarks to you this morning. I’ve read the excellent remarks from others before me at this conference, and my goal today is not to re-emphasize those, but rather to talk about the application of some of them. As many of you know, I’ve had more experience and devotion to practice than to theory. So I’d like to couch my remarks in the context of what I see as the unparalleled change occurring throughout the world today.

I say that because of the arrival of globalization, which has had an enormous impact on all of our lives in ways that are both obvious and not so obvious. Among the good things, it’s basically controlled inflation in the developed world—at least until now. But it’s also been somewhat disruptive in the sense that it’s commoditized products faster than ever. It has compressed margins for companies that are global players and has, in short, made the world a more competitive place.

Globalization has been enabled and fueled by the Internet, where key events are almost instantaneously shared with the rest of the world. There’s an interesting book out by Fareed Zakaria, called The Post-American World. Zakaria notes, among other things, that the world’s tallest building is now in Taipei. The largest publicly traded company is in Beijing. The largest refinery is in India. They make more movies in Bollywood, in India, than they do in Hollywood. He doesn’t see this as the decline of America, however, but as the rise of the rest of the world. Indeed, the political and economic domination by this country is coming to an end. We are going to have to participate in a very different way as we move forward. Not necessarily in a negative way, but in a different way.

The change that I speak about is everywhere, including the Church. If you think about it—and this was one of the thoughts I tried to express in my book [Confronting Reality]—it’s never been a more important time to face reality. While Americans like to think they are realists, the truth is that in many cases they deny reality. Look at key industries in the United States, such as the airline industry, the steel industry, the rubber industry, and the commodity chemicals industry, none of which can currently make, on a sustained basis, their cost to capital.

... leaders, wherever they may be, are often the recipients of filtered information from people around them—people who think the same way they do.

You could argue that if they had dealt with reality 10 years ago, they would be in much better shape today. The point is this: the sooner you recognize reality, the more options you have. But if it is so necessary, then why do we not do it? The fact is, reality can be traumatic. And there are a number of reasons for that. For one thing, leaders, wherever they may be, are often the recipients of filtered information from
people around them—people who think the same way they do. In other words, they hear only what they want to hear. As a consequence, they become obsolete together. They lose their perspective.

In that regard, if you watched the Democratic debates, you probably thought Obama won if you liked him. By the same token, if you liked Clinton, you probably thought she won.

Then there are the wishful thinkers of the world who believe things will always return to the way they were, even though there are structural changes going on that tell a much different story. You could argue that the pharmaceutical industry, the most profitable industry I’ve ever been associated with, suffers from this mindset. There is unprecedented scrutiny from consumers, from Congress, from the FDA. And yet they are not changing at nearly the rate they are going to have to if they are to ensure a successful future.

Finally, there’s the element of fear in some cultures that punishes people who hold unconventional views. They feel that dissident views are indicative of a bad attitude and, therefore, should not be heard. When people know that, they don’t express their thoughts, and key issues of the day never make it to the table. The point is this: regardless of where you are, you have to be more sensitive to your current environment. You have to be more anticipatory as to what is going to happen. And you have to be more willing to change, even if things are going well.

That’s admittedly hard to do for many of us. But if you really want the organizations to succeed, it comes down to a matter of execution. In my book on that subject [Execution: The Discipline of Getting Things Done], I define execution as the discipline of creating, energizing, and then sustaining an integrated business system for actually implementing—and not just announcing—strategies.

Show me a leader who is interested in execution, and I’ll show you an organization that is successful.

Execution is always the primary job of the leader. Show me a leader who is interested in execution, and I’ll show you an organization that is successful. If done right, it is a way to differentiate yourself in whatever activity you are in. The integrated business system I refer to is about people, strategy, and operations, and thinking about them in a linked way. In other words, when you talk about people, you talk about their strategic strengths as well as their operating strengths. When you talk about strategy, you talk about the ability of people to execute the strategy, as well as their operating capability. By virtue of linking them, you get a far more robust outcome.

I’ll talk about strategy first, because it has changed the most. In 1978, McKinsey brought a template into GE, where I then worked, announcing, if you will, strategic planning. I had some experience in this area at GE Capital, so I was appointed the strategic planner. I put a book together—six inches tall—full of graphs and charts, and we went up to GE headquarters in Fairfield. I can remember our session, just after lunch. The executives sitting across the table were barely able to keep their eyes open as we leafed
through this enormous book. No discussion of strategy, and it was quickly over. Everybody breathed a sigh of relief. We closed the book and put it back on the shelf for attention a year later.

That’s since given way to a far more dynamic strategy.

It’s straightforward. It’s attainable. And it’s more of a roadmap than a detailed plan. The people who would execute the strategy are, in fact, involved in its creation, so they can be held accountable. The strategy—which, by the way, applies as much to parishes and dioceses as it does to business—has been simplified enormously. It essentially comprises three pieces: environment, growth, and productivity.

As for environment, business factors that come into play are industry profitability, competition, and evaluation thereof. Drilling down another level, the environment also includes market share, regulatory developments that have or are likely to occur, and technological advances that might be forthcoming. If you apply this framework to the Catholic Church at large and try to determine the environment, you see some interesting parallels.

As most of you know, the Catholic Church’s population has remained at about 65 million people. But the composition of the Church has changed to the extent that more of the affluent have left, and more of the less well heeled have joined. Pope Benedict said in his recent trip to the United States that the Catholic Church in America is quite stable, much more, for example, than in Western Europe. Yet the Pew study indicated that one out of three Catholics born in the United States is leaving the Church. The Pentecostals and the Evangelicals are the chief beneficiaries of this loss. When asked the reason for this, some argue that they are offering programs that are more responsive to the youth or the aged, or whatever the needs of those who leave are. Despite all this, the Catholic Church operates some 637 nonprofit hospitals, striving every day to keep them afloat financially. It also educates 2.3 million children every day at a cost of about $10 billion or, put another way, with a savings to taxpayers of about $18 billion.

Despite their astounding educational contribution, Catholic schools have declined 56 percent in number since 1960, and another 14 percent since 2000. For each new school that opens, four close, producing significant financial ramifications. I’d like to emphasize that the environment in your diocese and parish may be quite different from others, and that there are some very positive things occurring alongside those that are troublesome. That’s why it’s more important than ever that you know the essence of your environment, that you understand exactly where you are. Whatever plans you make must be based on realism.

The second strategic pillar is growth. And for purposes of this gathering, I think you need to be focused on extending the vibrancy of the Church. While that will differ, of course, based on the needs of the various parishes or dioceses, I have three suggestions to guide the strategies of all parishes.

...when people drop out of the Church, do exit interviews to find out why they are leaving.
The first is to establish a parish committee for the retention of Catholics. In other words, when people drop out of the Church, do exit interviews to find out why they are leaving. There are a number of common reasons why they leave, including uninspiring leadership, insufficient activities for youth or the aged, sparse or ineffective laity involvement, and sometimes rundown facilities. Whatever the reason, it would be nice to identify it and then set up a committee to do something about it. I think the fact that people leave the Church and we just shake our heads and say “We can’t do anything about it” is a mistake. I think we should work harder to retain good Catholics.

At the root of most parish problems is insufficient money. . . we don’t have the kind of experienced laity we need to raise funds. We don’t have the imagination and persistence we need to be successful financially.

Second, create a sustainable and energetic effort to raise money in every parish. At the root of most parish problems is insufficient money. And a major reason is that we don’t have the kind of experienced laity we need to raise funds. We don’t have the imagination and persistence we need to be successful financially.

I have a daughter who lives in Paducah, Kentucky, which is not a very wealthy community. They are trying to keep a Catholic school alive, and to do that they have an auction every two years. Last year, they raised $300,000 at this event by getting all kinds of donations from across the country, and bringing the whole town together, Catholics and non-Catholics alike. With that kind of fundraising, they are going to be able to sustain their effort for at least the next couple of years. I think we can do a much better job in the Catholic Church of raising funds.

. . . I’d like to see every parish and diocese contribute to a nationwide public relations effort by the Church to highlight, publicize, and disseminate some of the significant contributions of the Church.

Third, I’d like to see every parish and diocese contribute to a nationwide public relations effort by the Church to highlight, publicize, and disseminate some of the significant contributions of the Church. This would be an effective way to offset the avalanche of negative commentary that appears so frequently about the Church. I don’t think we should just sit around and accept it. I think we should respond and try to do something about it.
These three areas, in addition to the strategies that every parish or dioceses should pursue, will not fix the world. But my hope is that they can put us in a little stronger position.

Another important part of any strategy is productivity. I’d love to see us have better systems in our churches and in our dioceses as a way to collect data and improve decision making. I’d also like to see all dioceses and parishes pool their purchasing power. We have just done that in the Bridgeport Diocese, where I’m a member, and have made significant progress. We also need to bring the various employee benefit programs—many of which are outdated—to a contemporary state, and at the same time look for ways to make our parishes, particularly the schools, run more efficiently. Productivity applies everywhere.

... accountability is anathema to many sectors of the Church. That needs to change.

The Church budget is another area that demands attention. In the business world, the budget is how we assess accountability. I know that accountability is anathema to many sectors of the Church. That needs to change. The budget is full of details, which means when you identify the various sources of revenue and costs, you should be able to identify who is accountable for them. Then you need to follow up. I’ve been involved in preparation of several of these budgets for the past three years. And it seems that when people miss budgets, they think, “Well, there’s not much we can do about it.” I say, “Well, you were involved in its preparation. You were involved in its execution. What happened?” In business, when you miss a plan, you’re asked to come in and chat with us, because we would like to know what is going on. I think we need to do more of that in the Church. We can’t just accept the fact we have runaway finances when it doesn’t have to be that way.

I’d also like to see each diocese and parish have a contingency plan so that if a key assumption like revenue doesn’t come in as anticipated, there is a prearranged response that can be put in place to get them closer to the original plan. Finally, I’d like to think that all of the dioceses and parishes by now have audited financial statements. There is clearly a need to publish these statements so they are fully transparent.

This brings me to the subject of people. Not just the identification of qualified people but, more importantly, the development and candid appraisal of people.
We even have a common chart of accounts now, so we can collect revenues and expenses, and we can analyze the impact across the dioceses and we have made some progress. We are nowhere near where we can be but I think we are off to a good start.

This brings me to the subject of people. Not just the identification of qualified people but, more importantly, the development and candid appraisal of people. I know that assessment in parishes is looked upon with great disfavor, but the core of any good organization is the ability to assess and develop people. We use a lot of different methods in business, but whatever way you choose, I think it needs to identify the person’s strengths, their development needs, and how you can help them meet those needs. It does not have to be a negative or punitive act.

... you should be leery of volunteers. They are all well-intentioned, but may not be qualified.

If that kind of process is taken down through the organization and everybody participates, organizations get better. I also believe—and say this with trepidation—that you should be leery of volunteers. They are all well-intentioned, but may not be qualified. Recruit people. Actively select those you feel can take on the major activities of the diocese or the parish. But do not let them come to you. Go to them. Then provide them with the training and assistance they need.

When I see what’s going on—especially in the parochial schools, which I’m familiar with—I realize we don’t give people a chance to grow. We don’t expose them to education. We don’t let them begin to get more expertise in the subjects in which they’re involved. I think that is a responsibility we have to fulfill.

We have to have a standard against which we identify and recruit qualified people.

Finally, we don’t guide people anywhere near the extent we should in terms of how they play their roles. We often hear the excuse, “We don’t pay as well as some others.” Well, I’ve been in places where that has not been an issue. We’ve been able to find people who can deal with our compensation structure and still bring the expertise that is a requisite to being good. I would like to think we could move on that front, as well. That is not enough, though. We have to have a standard against which we identify and recruit qualified people. I happen to like people who have an interest in hunting for data, and people who are interested in listening to the views of others. It’s also helpful to find people who bring clarity to complex situations. There’s an old notion that complexity equals intellect. The truth is simplicity equals intellect.
In addition, I like people who are interested in change, as opposed to just protest. I like people who are willing to cooperate. For example, I had a substantial issue at Honeywell in my closing days. We were organized in a matrix, which means we had separate functions in finance and marketing and manufacturing. The manufacturing people and the marketing people did not see eye to eye, nor did the heads of the organization. I called them together and pointed out that they were hurting the overall results of the business. We either had too much inventory or too little, and that simply had to stop. I said, “I’m going to now put metrics in place against which I intend to measure both of you. So it won’t be just you making your own metrics. You’ll be compared to the joint metrics.” They both nodded their heads and were fine. We were back three months later and nothing had changed. I told them I would make an unannounced visit, which I did, and still not much had changed. So I called the marketing and manufacturing heads in and gave both of them severance packages. I said, “You’ve both done a good job, but you won’t work together.” I had a big guard stationed at the door, and I said, “I want you to turn in your badges and leave the premises right now.” They left. I sat in my office.

...you have to have people who are willing to cooperate.

I am a great believer in succession planning, but I had a backup for neither of them. At about three o’clock, I got a telephone call from the guard, who said the two guys were trying to get into the building. I said, “Send them up.” They came into my office, and before I could say anything, they exclaimed, “I think we got it.” I said, “Fine.” We had a little discussion first, then I took back the severance packages. I said, “The next time we have to do this, there’s no turning back.” I can’t promise you that they ever liked each other, but they did work well together, and so did their organizations. And the overall business result was far better than before.

The point is this: you have to have people who are willing to cooperate. I like people with flexibility of mind, who are perpetually adaptable to ever-changing circumstances, who are willing to change, and who are not averse to taking risks.

Beyond that, I like to see some emotional strategies in every organization I’m affiliated with. The first is authenticity. No fakes, no cutting corners, no multiethical environments. One of the great testimonies to the Catholic Church came out of the memorials given to Tim Russert last week. He was a truly authentic guy, and a good Catholic who lived his life by his religion. The more people we can get of his ilk, the better off we will be.

The second emotional strategy is self-awareness. In other words, people who are comfortable with their own strengths and not dismayed by their shortcomings. People who are willing to hire people better than they are in order to get a job done. Simply put, if you are not experienced in finance, get somebody who is. If you are not experienced in marketing or education, get people who are. Then put them together as a team.
People who maintain their positions forever never grow, and the absence of growth ultimately undercuts how far they can go in business.

The third emotional strategy is the ability to embrace new ideas and adjust to change. How many times have you heard people say, “What you see is what you get.” That’s an ill-advised place to be. You do not want to change your ethics. You do not want to change your values. But you do want to change your mind in the face of new facts. That is how you grow. People who maintain their positions forever never grow, and the absence of growth ultimately undercuts how far they can go in business. I always thought that Jack Welch’s long tenure at GE was because he believed in renewal, that every five years or so he would go to some distant part of the world and come back re-energized with new ideas. He was not the same person at the end of his 20-year reign as he was at the beginning because he was always trying to push the envelope and renew himself. He’d then come back and do the same for the organization.

... it is important to embrace humility. ... People with big egos do not listen, and people who do not listen do not learn.

Finally, it is important to embrace humility. When you appoint people to leadership positions, you have to assess how they’re going to handle it with respect to ego. People with big egos do not listen, and people who do not listen do not learn. That position often morphs into arrogance and hubris, which cascades through an organization. It sows the seeds of its destruction.

“Do you understand humility? Let me tell you what it means. ... It’s not thinking less of yourself. It’s thinking of yourself less.”

I remember as a young boy I was high spirited and confident. My mother was a very important influence in my life. Around 10 years old, I was boasting about something to her, and she said, “Do you understand humility? Let me tell you what it means.” She went on, “It’s not thinking less of yourself. It’s thinking of yourself less.” I never forgot that. I don’t mean to say I lived that way every day of my life, because I haven’t. But you want to have people on your team who can contain their egos, because large egos, if unrestrained, are destructive. Your goal is to build a culture, regardless of what kind of organization you are. And that, to a large extent, means the behavior of your leaders. You don’t create a culture
by a plaque or a film or a speech. It emerges as a consequence of what your leaders do, how they accept and welcome ideas, how willing they are to debate and then resolve things, and how they interact with others. Interaction is particularly important. You don’t want an environment where people say, “We have to be careful not to bring this up with Mr. Murphy because he doesn’t like discussions on this topic.”

Culture involves pride in achievement. There is a meritocracy where the best people get ahead. I got a great e-mail when I was about to retire the second time, and it read as follows: “We don’t think ourselves into a new way of acting. We act ourselves into a new way of thinking.”

Culture clearly matters, and you have to make sure you understand yours. To the extent that you don’t like it, what are you going to do about it?

There are a number of things that happen to organizations and their people that can increase their effectiveness or hinder it. Let me first address the latter. I like to refer to one hindrance as missing in action. In other words, when the heat gets a little hot in the kitchen, these people are off visiting others they’ve never seen before. That is not helpful.

Then there are people who are slow to move, who have blind loyalty. Everybody wants to be loyal. But at some point in time you have to act in the best interests of whatever organization you’re a part of. Blind loyalists do not identify or grow or stretch good people. They do not know the true difference between capable people and those who may not be. And then there’s indecision. How many people say, “Let’s have another meeting,” while under their breath they’re thinking, “But for heaven’s sake, let’s not make a decision.” Those people are not helpful either.

Finally, you have people who miss commitments all the time without going back to analyze the root cause of their miss. As a result, their poor performance continues.

You see some wonderful characteristics in people who populate good, vibrant organizations. The first characteristic is energy. Not just their own energy, but their ability to energize others. Then there are people who are persuasive and clear. You don’t mandate anymore. You have to convince people and then be patient. If you repeat yourself enough times, you can be effective.

The third characteristic is people with courage and passion who speak up when they have a viewpoint that ought to be expressed, and who also are willing to accede to another view if it is better. The important thing is that a candid discussion is going on at all times in search of the best answer. Then there are people with great self-confidence who, even more importantly, can inspire self-confidence to others. And the more self-confidence your organization and its people have, the better they do.

Finally, I have always believed you have to be candid. I’ve tried to live by that principle myself, never saying anything behind someone’s back that I wouldn’t say to their face. That is how you ultimately build a relationship. Even though not everybody in your organization is going to hold you dear to their heart, at least they will say you are honest, fair, and candid.
At the end of the day, there are six priorities that I think define good leadership everywhere. The first is that people know enough about their business to participate in its decisions. They may defer to somebody else with a better idea, but they are involved. Even if people are followers, they want to make sure their leadership is actively engaged.

The second priority is that they embrace realism in everything they do. I like to tell a story about Xerox, which was having great difficulties four or five years ago. They promoted their COO to be the CEO, and he decided to do two things: reduce the number of call centers, and develop separate organizations across the country to sell big equipment and medium-sized equipment. He went out into the field to explain his ideas to people, and the general reaction was, “Our customers are already confused, and if you introduce them to a new salesman and new call center people, things are going to get even worse.” He went back and thought about what he had heard from the field, but decided to implement both ideas anyway. Chaos ensued, and within six months he realized the urgent need to do something else.

The point is this: it’s not important only to have a good idea, but to know when to implement it. So many good ideas go by the wayside because they are put in place at the wrong time. Rely on realism. Set clear goals, but not too many. Organizations with 10 goals have no goals. Have four goals that you can measure the organization against, and then make sure you hold people accountable for their performance.

You may not be able to differentiate through high salaries, but you may be able to do it through promotion and through recognition.

The next priority is reward the doers. You may not be able to differentiate through high salaries, but you may be able to do it through promotion and through recognition. By virtue of that differentiation, the good stay. Conversely, if you fail to reward the doers, they end up leaving while the mediocre stay put, and your organization deteriorates.

Beyond recognition, I’d like to emphasize the importance of coaching your people. Take it upon yourself to ask, “Am I making the people that I work with every day better? Is this organization better today than it was a year ago? And if not, why not?” What is equally important, of course, is to know yourself. The higher up you go in any organization, the less constructive feedback you get. No one wants to go into their boss and say, “You’re a jerk.” You have to hold yourself accountable. You have to have your own standards. You have to measure yourself in a way that keeps you contemporary. People who do that continue to grow.

At the outset, I stated that I was here at the urging of my daughter Lynn. While that’s true, I am mostly here because I am repulsed by the angry, scurrilous, and often vitriolic campaign being waged almost daily against the Church. The Church that I respect, the Church that I love, the Church that has been an incomparable companion to me for all of my life. Thank you for inviting me.
Plenary Discussion Highlights

*Geoff Boisi:*  
One of the issues we as Catholics who love the Church have is that over the last several years there has been a hit in our credibility as a Church. Maybe you could share with the group some of the things that you have seen in business in terms of those organizations, revered institutions that have lost credibility, or lost reputation. And identify a couple of the keys right up front that need to be done.

*Larry Bossidy:*  
I think that when you see organizations go through these things, it is a clarion call to action. You never want to see the Church repudiated the way it has been in the last year. But it could also be the foundation of something a lot better going forward. In other words, I think it is a call to action. You have to address some of the things that have happened in a way to preclude their recurrence.

Use it to build as opposed to destroy. I see a lot of things in my own diocese. We do a lot of things better now than we did five years ago. I would be the last to say we have gone as far as we need to go. I think we are slowly earning back the trust and confidence of the people who come to Church, who at one point in time lost all confidence in us, but some awfully good things are happening. I would like to think, I do not want to dwell on the fact that we are in a troubled state perhaps because of what has occurred. I would like to say that is the platform we can use to build and expand and be a more prolific and contributory Church in the future.

*Fr. Bill Byron:*  
Fr. John Hurley is here. He publishes the magazine *CHURCH.* They have best practices. I would also like to see what the bishops here can do with the administrative committee of the USCCB to give you a half hour on their agenda when they meet in November. The authenticity, the style, the directness, the candor, it’s exactly what we need. To have a Q&A with them would be terrific. Thank you very much for what you gave us.

*Jon O’Herron:*  
Some 65 to 70 years ago, Larry Bossidy and I were altar boys at a church in Pittsfield, Massachusetts. I think yesterday was the first time in 70 years we have both been to church in the same place at the same time. He also told me that the church was closed last weekend. I just want to echo what you just said. The bishops should have an opportunity, in one form or another, to hear what Larry has said. . . . I hope that the bishops here will support that and recommend that and execute it.
**Gerry Roche:**
I am sitting here and I am so frustrated, wondering how we bottle what this fellow has? How do we promulgate it? How do we get it out there? Larry, how close are the business schools of today teaching and inspiring the stuff that you just gave us? How close are they to filling the need that’s out there?

**Larry Bossidy:**
They are better but not good. In other words, the business schools always teach about yesterday’s problems. They never talk about tomorrow’s problems. They finally decided to have some courses on ethics after what we have seen with the Enrons and some other terrible departures. Now they begin to get interested in execution. They recognize that if their graduates are not able to get things done, they are not going to be able to realize their ambitions. So they are beginning to talk about that and even to instruct about it. I wish these curriculums were more advanced than they are. I wish they would change more, change in the sense of keeping up to speed as to what is happening around the world.

**Frank Butler:**
Mr. Bossidy, the Church, generally speaking, with a few exceptions, is chronically underfunded. You talked about the schools and so forth, but you can almost cut into any sector of the Church’s life and see how we just do not have the funds to do what we strive to do. This comes back to our performance as donors. It is an underperformance. There have been lots of data over the years to show what the per capita giving is and so forth.

We know from the research that an awful lot of this typically comes down to engagement and participation. Parishes that engage their parishioners do better. But generally, there is this underperformance. You had mentioned in the course of your remarks to be leery of volunteers. In the church there are various purposes of getting people to volunteer. There are some professional capacities. There are also things that need to be done, ministries in a parish that can be done by volunteers.

But it seems to me that we’re in a bit of a dilemma. How do you engage the Catholic people such that they buy into the institution more so that we can do something about the chronic underfunding that’s there and, at the same time, ensure that there’s quality in what’s going on?

**Larry Bossidy:**
In terms of clarification on volunteers, we need volunteers. I am saying be wary of people who volunteer. Pick them yourself. There will still be volunteers, but you will have a much better handle as to what they are about and I think they can be more effective.

In terms of the fundraising, frankly, we leave too much of it to the clergy. This ought to be a central activity of the laity.
...if we put more imagination and more creativity and more innovation in the fundraising effort, and we have the right people doing it, then I think we will have far more success.

They have a Robin Hood’s Dinner in New York every year. They raise $50 million on an auction in one night. Unfortunately, they are not Catholic. I think if we put more imagination and more creativity and more innovation in the fundraising effort, and we have the right people doing it, then I think we will have far more success. If you look at the demise of the Catholic parochial schools, almost invariably it is because of money. I think we have to readdress the subject again and put a lot more time and effort in.

Remember, you get a request every day from somebody to make a donation and they are all good causes. But we somehow have to get closer to the top of the list so that we can support the things that we think at least are central to the future of this country. I think a parochial education is one of them.

Participant:
I have a question about the impact of electronic communication. What do you foresee in the next three to five years will be the influence of the virtual communities and the electronic exchanges on leadership?

Larry Bossidy:
First of all, it is moving so fast in that direction. As your question suggests, it is not whether it is going to happen, it is when it is going to happen. There will be some wonderful advantages to it in terms of data that you can collect and people you can contact. It will also be a continual source of misinformation. It has to be managed in a way. In other words, you have to play, you cannot just let some of these groups come and attack the Church, for example, without having somebody pushing back. We have to be engaged. We have to participate in it. We have to move it in the direction we think is the most probable. It is a big deal because it is here now and it is only going to accelerate, it seems to me, in the days ahead.

Fred Gluck:
The Church in the world and in the United States is highly decentralized. We have the USCCB here in the United States. But the real operating units are the parish and the diocese. We have had some good success in the last year working on specific problems in specific dioceses and in parishes. We have not had as much success in moving through and getting the interest of more bishops and more dioceses in listening to us and hopefully entertaining some of our ideas. Do you have any suggestions on how we might approach that problem?
Larry Bossidy:
I will answer it carefully because I do not want to sound like I am an expert on the subject. As I work with my bishop more and more, I realize that the bishops do not have enough power. You can talk to a parish pastor and if that pastor wants to cooperate with you then it will work. If he does not, there is not much you can do.

Number one, I guess that is not going to change. We have to accept what it is. Beyond that, I would like to see bishops try to be more persuasive because this is in their best interest and why it is in the Church’s best interest. As you say, some bishops and parish pastors pick this up and you see some wonderful progress. Others ignore it. I do not think you can give up on those. I think you have to continue to try to persuade them that this is something that, while different than the ministry they volunteered for maybe, is nonetheless a consequence of the passage of time and, as a result, something they have to get engaged in.

I would like to think we could continue to be more successful. It is going to be slow. I talked to a number of people before coming here. This organization has made an impact. We are not nearly as far advanced as we need to be. That does not surprise any of you because it is difficult to change. I hope that we can continue the efforts. We can continue to be persistent and even if it is slow, we will make the progress that is going to be so essential to preserving the strength of the Church.

Barbara Anne Cusack:
Rather than looking at what power a bishop has, it would be useful to go back to yesterday’s gospel that ended by saying, “they listen because he spoke with authority,” and maybe look at how we assist our bishops in exercising the authority that is rightfully theirs. Maybe it is hearing from people like you of what is good exercise of authority. I think that will bring more parishes, more pastors in line rather than exercises of power to learn how to yield to their rightful authority.

Larry Bossidy:
I think that’s an interesting viewpoint. Maybe my history would say that, right or wrong, I got more done by power than I did by persuasion. I have talked to some of these parish pastors, in my diocese, who have been reluctant to join this. It is not an easy conversation. They know they do not have to do it.

They have to want to do it. The bishop has tried, others like me have tried. It is a problem that we need to address. I am not sure that I know the answer because these are basically very good men. I am not trying to say they are not. I am just saying in this particular aspect, they do not think this belongs in their ministry. We have to do better on that front than we have done. How to do it? I want to be humble because it isn’t clear to me how we get it done.
Mary McDonald:
We have a practice that every year the principals and all in the Catholic schools’ office read the same book and we discuss it for an hour at each monthly meeting. We have chosen *Execution* as the book that we are all going to read together.

I think that if everyone here returns to his or her circle of influence and just gets ideas out there and talks about it and makes it alive in people’s minds and hearts that things change, that things can happen.

Participant:
When you look at the Church’s organizational culture, what are the two or three things that you would say serve it well and what are the two or three things about the Church culture that do not serve it well?

Larry Bossidy:
I think the good cultures that I have seen are almost invariably led by some inspiring people. They reach out to all demographics in their parish or their diocese and try to have programs that are responsive to the needs of a whole bunch of people. As a consequence, you bring it together in a way that is progressive. It feeds on itself. It is a positive situation.

The ones that I have seen that are troublesome to me, they do not have the leadership and they do not have the engagement to keep people involved. It kind of lists along and then people lose interest and they leave the Church and go someplace else.

Regardless of where you are, it is always about leadership. I do not mean it just has to be the leadership of the pastor. I mean it has to be that plus the leadership of the laity that can get it in a vital, progressive, accomplishment-oriented organization. When that happens, people love it and they stay. When the opposite occurs, people drift. And unfortunately that happens all too often.

Participant:
The culture of a diocese is very much conditioned by the bishop and the chancery. You say the bishop does not have much power. There is a sense in which that is true. I remember when our diocese was very worried about a new bishop. I said, “Just relax. He’s basically a quadriplegic.” I mean, he can put out decrees, but the reality is the parish and the pastors is where the Church happens and the bishop’s ability to work with that has to do with the principles you mentioned about persuading, rewarding, promoting excellence, recognizing, encouraging, providing opportunities for growth and development.
An awful lot of those things are the things that this organization can focus on helping a bishop do and provide for his pastors. The pastors are not ill-intentioned but will need coaching and leadership from the top that is going to work with them, and not do it by power and decree, which frankly, does not work.

_Fr. Dennis Holtschnieder:_
I would say that many of the dioceses of the country have Catholic universities and Catholic hospitals within their areas. Both of them are run by individuals who cannot manage by decree or _fiat_.

I cannot tell my faculty what to do and a hospital cannot tell its doctors what to do. So you have some resources of folks who have learned how to lead in that kind of setting that might be very useful. I know my trustees look at me all the time and go, “I’m glad I don’t have your job.” Because they’re used to a different type of leadership.

_Larry Bossidy:_
I think you are absolutely right. I think it does take different skills. I think it does take more patience. The good thing is that if you do it right it can be done. It may pose a degree of difficulty beyond what is common in business, nonetheless it can be done. I encourage you to continue to think of new ways to motivate and inspire and get things done.

_Participant:_
Why do you think so many have left the Church and what are some of the things that you would recommend that the Church do to get those people back?

_Larry Bossidy:_
I would like to think that we could do a form of exit interview when we talk to people who leave the Church and try to find out why they left. Was it uninspiring leadership? Was it lack of programs for the youth or for the aged? What was it that caused them to be dissatisfied? Then to try to come up with some programs in order to prevent the next person from leaving. I have seen too many parishes that when people leave they say, “Well, that’s just part of it.” I don’t like that idea. I would like us to work harder to retain people or even reclaim people, if you will. The only way you do that is to find out the root cause of the disaffection and then do something about it. I am trying to encourage my own pastor to do that. We have a pretty vibrant parish, so we don’t have many people who leave.

In the parishes where they do leave, the pastor is not interested in finding the root cause, so they continue to leave. You have got to keep working on it.
**Participant:**
I think that there’s a great opportunity for the Leadership Roundtable, working in conjunction with you, to develop a collaborative model for bishops and pastors to work together on issues of leadership and execution. My concern is that many pastors today see themselves as trustees of a parish model that has not worked for some time. Few of them, I think, see themselves as true leaders.

For lots of reasons they actually want to avoid leadership because of some of the stresses that they see as part of it. I do not think our Church, our bishops, or the pastors’ groups have worked hard enough on addressing this issue. It might very well be that bringing this sort of frank talk in a collaborative manner to the bishops would help them a great deal to face their own issues of leadership. I think the bishops have certain types of, if noncanonical power, they have certain leverages that many of them are hesitant to use.

For example, in the business area, where the dioceses are providing certain services to parishes at given rates, one could easily charge premiums for those parishes who refuse to cooperate in certain areas of best practice. For example, issues of liability insurance, *et cetera*, if you are not following certain best practice procedures with regard to how you count your collections and account for that, different rates could be charged for liability insurance or various types of coverage on those types of things. That is just an example.

**Larry Bossidy:**
I think Geoff [Boisi] has worked hard on that. I think some of that goes on right now. I am sure there are plans to expand it. I think that is a good suggestion.

**Lynn Tidgwell:**
I want to thank you for coming. We are all going back to our parishes—what would be one thing we can take from this?

**Larry Bossidy:**
I think that is a crucial question. I think one of the take-aways from a conference like this is an answer to the question, “How do you apply some things you all agree to and then get it done?” If I had one recommendation only it would be to not give up on people who don’t necessarily see it right now. In other words, take the time to explain why you think it is important. Then take the time to do it again. By virtue of giving up, you are kind of admitting defeat. That is not where we want to go. Be imaginative as to how you approach them. Be patient in terms of their ability to come along with you. Help them along if there is an area they are uncomfortable with where somebody in the laity may be useful. I think if you do it on that basis some will come along immediately. Some will not. But over the longer term, we are going to be able to get most of these people where we want them.
Acknowledgments

The National Leadership Roundtable on Church Management owes the success of its 2008 conference to the dedication and commitment of many people. We would most especially like to thank the bishops and executives for taking time out of their enormously busy schedules to lend their insight and leadership to this critical dialogue and for their dedication of service to the Church.

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Appendix A

Leading a Catholic University in the 21st Century

Dr. John J. DeGioia, President, Georgetown University

It’s great to be with all of you, though it feels a little presumptuous to be offering some of my remarks in the presence of my peers. It’s even more intimidating when I think that I’m offering these remarks in the presence of such iconic figures as Fr. “Monk” Malloy, Fr. Bill Byron, and Fr. Don Monan. I’m also well aware that Fr. Bryan Hehir, who was a part of your conversation this morning, was a reader of my dissertation. So, to some degree, this feels a little like an oral exam.

I’d like to tell you one Bryan Hehir story. And that was my very first encounter with Fr. Hehir. I started working as assistant to Fr. Timothy Healey, President of Georgetown, when I was a graduate student. It was December, 1982. Right at the time I went to work for Fr. Healey, he went in for quintuple bypass surgery. So I was responsible for the office during those days.

This was over the Christmas break, so it wasn’t too bad. But the mail was coming in, and I didn’t know how to read it or sort it. Well, I got this call from somebody I had never heard of, who said, “My name is Fr. Bryan Hehir and I work with the Bishop’s Conference. I need your help. We have a political prisoner, a dissident, in South Korea who, if we can’t get him out, will likely die. We think if we can offer humanitarian intervention in the form of healthcare at a place like Georgetown—this person is very ill in detention—we might be able to convince the authorities to let him go.”

Well, you could imagine. I was a kid and I’m like, what am I supposed to do? So, later that day, I went to the hospital to see Fr. Healey, who was all wired up, and I started going through the list of things I needed to tell him. I said, “Your sister called and she wants to make sure you’re okay. And Fr. O’Keefe called from Rome and he also wants to make sure you’re doing okay. And, by the way, I got the strangest call from a guy named Bryan Hehir who had this really unusual request about some guy in South Korea.” And all I could hear through all this stuff that was attached to Fr. Healey was, “You do whatever Bryan Hehir tells you to do.” And that’s been my practice ever since.
One last footnote to that. That political prisoner was Kim De Jong, and 15 years later he was elected President of South Korea, and went on to win the Nobel Peace Prize.

I hope that the remarks that I’ve prepared are consistent with where you are in your work as an organization. I want to talk a little bit about how I’ve tackled the question of sustaining our identity—our Catholic and Jesuit identity—from the perspective of emersion in the responsibilities of leadership. I’ve just finished my seventh year as president, and my 25th year in administration. I’ve had lots of other jobs during that period. But the remarks that I offer will be from the perspective of serving those last seven years as president.

In offering these remarks, I feel a little bit like the coach who comes off the field at half-time, and they stick a microphone in his face and say, “Well, what do you think? How’s it going?” It seems a little unusual because this is very much a work in progress. And so, what I offer is the perspective of somebody who’s living this every day. And in that context, I’d like to focus on three areas: talent, ideas, and networks. Moreover, I’d like to focus on how one person, in the context of one Catholic and Jesuit university, has been wrestling with this issue of identity, and how to sustain and strengthen the authenticity of our identity at this moment in the life of the university community.

One of the things I learned . . . was the need for institutional structures that enable you to do some things maybe a little bit differently.

I mentioned earlier about being in the presence of Frs. Byron, Malloy, and Monan. One reason that’s important is because I think they’re going to hear some resonance. They may even hear their own words in some things that I say today. Because it truly is from them that I’ve been able to establish a framework that has enabled me to wrestle with the challenges that we face. But first and foremost is this question of talent. When I stepped into this role, one of the first people I went to visit was Fr. Monan. And I was trying to understand how he understood his responsibility for sustaining Catholic and Jesuit identity at Boston College during his extraordinary leadership there.

One of the things I learned in that experience was the need for institutional structures that enable you to do some things maybe a little bit differently. All of us are universities. And when you look at the structure of a university, embedded in them are not necessarily all the things that you might need to sustain a unique identity as Catholic, and in our case, also Jesuit. So, at Boston College, Fr. Monan created a couple of new kinds of structures. One was led by Fr. Michael Buckley with the Jesuit Institute. Under Fr. Buckley’s leadership, Boston College created academic contexts, seminars, and workshops for folks who might not otherwise be engaged with the Catholic intellectual tradition in ways that could really inform and strengthen their work. He also brought in Fr. Howard Grey at one point to run a news center. The center was really a venue to allow certain talent to flourish.
So, when I stepped into my role, I took that lesson and tried to determine whether we had the structures. Did we have sufficient talent across a broad enough range of the institution to be able to really make the kind of impact that we needed? And the judgment was we didn’t.

So, we went and created some things. Among them was a new position called Vice President for Mission and Ministry. Since we borrowed this idea from about 200 other places, we had some ambivalence about how to best structure the role. So, very early on, working with a group of colleagues, we made a decision about how to move forward. We recruited an extraordinary man in Phil Burrows to be a part of our leadership team. We also looked at areas where we thought we might need to do other things. And this brings me to the second category I want to talk about: the ideas that informed our work.

As part of that discussion, we created some other important roles, including Special Assistant to the President for Inter-Religious Initiatives. We went looking for somebody to fill it, and found an extraordinary person who had 17 years at the USCCB, working in this field. His name was John Borelli—and he was not a typical academic hire for a university. So, we brought him in, and tried to figure out how we might fit his unique talents into what was perhaps an unusual context for him.

And we did the same for a couple of other people. We looked for talent that might not normally think of a university as the place to be. Then we thought about structures that might make sense for a university to have—structures that would enable that talent to flourish. I can be more explicit about that by describing a few of the ideas that really did shape our work.

I was part of a faculty conversation that took place in the mid-1990s. There were about 45 of us at a faculty seminar on our Catholic and Jesuit identity. A guest at one of the seminars was Fr. David Tracey from the University of Chicago. He gave a beautiful talk and it was one of those great moments. But then there was this lull before the Q&A started, and somebody had to step in. So I did, and threw out the most obvious question, because it really reflected the way in which we framed thinking about our Catholic and Jesuit identity through the previous generation, which was a version of the secularization thesis. I asked, “Father, do you think it’s inevitable that as Georgetown seeks to become better and better as a university, that we’re going to end up becoming more and more secular? And will we lose our ties to our Catholic identity, with the analogies being Harvard, Yale, and other places?”

Clearly, this is our great strategic advantage as a university, to be able . . . to engage with a comfort level in the discourse of religion, with the language of faith, with the rhetoric that we take for granted.
Fr. Tracey said something that’s really shaped the way I’ve thought about these things ever since. He encouraged us to abandon that line of thinking, saying, “Consider the challenges that faced a Harvard or a Yale in the 19th century when they made that decision to, essentially, distance themselves from their animating religious traditions. If they were facing the same set of questions today—and you look at what is defining the most interesting intellectual puzzles, problems and challenges in our world—do you think they would make the same choice?”

Clearly, this is our great strategic advantage as a university, to be able at this moment in time to engage with a comfort level in the discourse of religion, with the language of faith, with the rhetoric that we take for granted. And stepping into this role, I looked at some of the challenges we faced. One of them is that we have too often as a university allowed others to tell us whether or not we were authentically Catholic and Jesuit. And so, we looked at this real hard and tried to say, If you look at any of the 200+ Catholic colleges and universities and you look at the 28 Jesuit colleges and universities, every one of them has its own distinct character. What could Georgetown really focus on, in terms of development, that would enable us to really be true to our identity and deepen the authenticity of who we are?

In 1993, we established a Center for Muslim/Christian Understanding. . . . We began exploring . . . what could foster interfaith and inter-religious dialogue. . . . And we now have a new center called The Berkeley Center for Religion, Peace, and World Affairs, which really looks at this intersection of the role that religion plays in our world today.

We identified four key areas that we thought were absolutely resonant with who we are. The first was building from an important strength we had established over the years—a commitment to inter-religious understanding. We had hired the first rabbi on any Catholic campus on a full-time basis in 1968. And I’m proud to say Harold White is still with us 40 years later. What’s more, we were the first American university to hire a full-time imam, more than a decade ago.

In 1993, we established a Center for Muslim/Christian Understanding, and just two years ago a donor gave us a gift to endow that center. We began exploring what we could do that was different, what could foster interfaith and inter-religious dialogue. We pulled together faculty, board members, and potential donors in a series of workshops over the course of a couple of years. And we now have a new center called The Berkeley Center for Religion, Peace, and World Affairs, which really looks at this intersection of the role that religion plays in our world today.
... if you look at a textbook in international relations, you won’t find religion under “R.”

Georgetown has some real strengths in international relations, and Fr. Hehir was the intellectual architect of that. He taught me that if you look at a textbook in international relations, you won’t find religion under “R.” That just isn’t part of the discourse of the Treaty of Westphalia. And so, we’re trying to anticipate where the intellectual discourse will be going in the next generation by establishing this center and recruiting into it people who enable us to do some things that are a bit different. We also have a program in the study of Jewish civilization that will soon be a center. We’re currently working on the funding.

“Are we true to our Jesuit identity?” I say with complete integrity that our students today have a deeper experience of what it means to be a Jesuit University than at any time in the last generation.

It’s in the spirit of this work that we could recruit somebody like a John Borelli to be a part of our team. John’s been able to foster different kinds of engagements that would not normally happen at Georgetown. As an example, we hosted in April the Evangelical Catholic Dialogue, which was co-chaired by Rick Warren of Saddleback Church in Orange County, California. Rick, as you know, is author of the biggest selling book in history, *The Purpose Driven Life*. He was the Evangelical chair and Cardinal McCarrick of Washington was the Catholic chair for the dialogue, which brought together leaders from both communities.

A second idea we’ve been working on stems from a question people ask me: “Are we true to our Jesuit identity?” I say with complete integrity that our students today have a deeper experience of what it means to be a Jesuit University than at any time in the last generation. When I went to Georgetown, the resources simply weren’t available. What do I mean by that? Coming out of the Second Vatican Council, there was a group of men that said, “This is our moment to retrieve the animating spirit of our tradition.” And they did some great work, as evidenced by John O’Malley’s book, *The First Jesuits*. Some of them have reinterpreted the spirituality of St. Ignatius in a way that makes it available to lay people and to students through retreat programs. And we have a man on our staff, Tony Moore, whose entire role is to facilitate Ignatian spirituality in the same way that Fr. Monan brought Fr. Grey in to Boston College to animate that community.
Tony is now working with a group of folks to find ways to tap into the resources that simply weren’t available a generation ago, and to inform the life of our community in ways that are really exciting. This focus on Ignatian spirituality is perhaps best manifested in the work we are doing as a team in offering the 19th Annotation, which is an approach to the spiritual exercises of St. Ignatius that’s really geared to lay people. It’s meant for folks who would find it difficult to take 30 days to go off-site and do it in the traditional manner. And the result is that we can’t meet the demand right now for spiritual direction for the 19th Annotation. That’s been a really exciting development for us.

[in] the old phrase of Fr. Eric Prisuara, “The university is the place where the Church meets the world, and the world meets the Church. Where the values of culture meet the culture.”

A third theme has been how we take the values of our tradition and engage with culture—with the dominant values that we find in our society today. And here again, it’s meant recruiting the right people, most recently Fr. Peter Steele from Australia. But over the years, others have been able to come in and foster a level of discourse that if our universities weren’t providing, I’m not sure who would be. To quote the old phrase of Fr. Eric Prisuara, “The university is the place where the Church meets the world, and the world meets the Church. Where the values of culture meet the culture.”

Another question we’ve been wrestling with since the 1960s is this: What is the responsibility of a university to the poor? And what is the nature of our engagement in social justice? This brings to mind the challenge issued by Fr. Pedro Arrupe in 1966 and in 1973 to everyone engaged in Jesuit higher education: “Do you recognize the responsibilities you have to justice?”

What is the responsibility of a university to human development?

In this same room, I gave a talk on that question to another national organization. Actually, the question was phrased this way: What is the responsibility of a university to human development? And that’s a good transition to the third key category I’d like to discuss: the networks we have access to by virtue of being a Catholic and Jesuit university. When I got this job, I flew out to visit Fr. “Monk” Malloy. And he gave me some of the best advice I could have possibly been given. He encouraged me to actually go to Rome and spend time there visiting some of the congregations. He urged me to get into conversations with them to see how we might be able to support some of their work.
I’ve since made that a regular practice. And it’s resulted in some really wonderful things that we’ve been able to do as a university connected to this extraordinary network. I’ll mention two of them just to give you a sense. We hosted for the first time ever in the United States the Annual International Prayer for Peace of the Community of Sant’Egidio. This is a group that we’ve been working with since my first trip to Rome in 2002, and we’ve been collaborating on a lot of different fronts.

One of those is HIV/AIDS, where they’ve challenged us, and we’ve been a resource to them. Recently, we invited 21 members of the Bishop’s Conference and the Health Care Ministry of the Catholic Church of India to come to Georgetown for a three-day workshop. Led by Cardinal Toppo, the workshop also included the Global Ambassador for HIV/AIDS, the Department of State, the Gates Foundation, USAID, and Catholic Relief Services.

You can imagine there might be some eyebrows raised by some faculties. Should this really be the work of a university? Well, I would say without any hesitation, this is the work of a Catholic university. And many of our faculty have found a way to engage in this work that has a deep resonance with their own academic interests, and their own personal passion for where they want to be in their lives.

Let me just summarize by saying that I’ve tried to step into this role and wrestle with the question of the authentic character of our identity, while ensuring that we had the right people in the right places doing the right things. I’ve also tried to ensure that we are appropriately focused on a set of ideas that have a deep resonance with who we are as an institution, recognizing that we are not alone. Indeed, we’re part of an extraordinary and far-reaching network of talent and institutions. And that network provides us with an exciting new way of engaging the outside world as a university.

**Plenary Discussion Highlights**

*Participant:

An observation that my father made from Catholic University is that today we have Catholic Studies departments. And much of what they taught in Catholic Studies was standard curriculum when he went to school.*

*Jack DeGioia:

That curriculum ended in the late 1960s, for the most part. The distribution requirements can give you access to some of those courses. But Catholics—and, you know, many of us have been very ambivalent about this issue—wonder whether you really need to set apart a special group of people for a particular set of issues that you would hope would be more widely distributed and more pervasive across the curriculum. I can tell you what the internal discussion has been for a good generation at Georgetown.*
It has been: “No, we don’t need it.” “Yes, we do.” “No, we don’t need it. We can get it across the curriculum.” “Yes, we do. We need to privilege certain kinds of work, certain kinds of recruitments, and certain kinds of projects.” Right now we have one. But, if you evaluated this issue at Georgetown, I think you would sense the ambivalence to the depth of our engagement with it.

Participant:
My niece is a sophomore at Georgetown. When your undergraduates leave you, how will we recognize them as graduates? In other words, what’s the formative part of Jesuit and Catholic education at Georgetown? When they leave you, what’s distinctive?

Jack DeGioia:
That’s a great question. What would differentiate us, our graduates? I’m going to be concrete about it. I’ll give you what my experience has been over 25 years. Tom Healey is a member of our Board. He and I have come to know each other well over 15 years. There are some people at Georgetown I have known since I was 18. Others I’ve known since, maybe, they were 40 and I was 25. And now they’re 65. When I first met them, their kids were young, for these folks.

And then I watched their children come of age and come to school. Some of them came to Georgetown. Now these people are near the end of their careers. What I’ve noticed is that, for those who’ve sustained a deep commitment to the institution, what it means to be connected to us is something different at different times in their lives. At an earlier age, it may just be that this is a place where they can connect with folks who share certain values, a certain set of formative experiences. But these values and experiences would resonate with some of the choices that they are making—in terms of their career, where they’re sending their kids to school, how they’re spending their extracurricular time, their outside the job time, their volunteer time.

They share something that’s a little hard to articulate, but that has a deep resonance with where they came from. A little bit later it may have more to do with their children’s education. And wanting to ensure that, as a part of that education, there is this dimension that, I think, we believe is a part of a Catholic university. And it will be questions around that education that might be animating them at a moment.

But a little bit later—especially what I’m seeing now, watching this lifespan of people—they’re coming back to the campus for the five-day retreats. They’re coming to the campus for a level of engagement with their own—our vocabulary, with their own spirituality, in a way, that probably wouldn’t have been possible if certain seeds weren’t put in place a long, long time ago. We had our reunions. And you can see, you know, just the span. Whether it be the 50-year class that I first met at their 25th. And you know what 25-year reunions are like. They’re nothing like 50s.
And you just get a feel for how some of the questions that really shape who they are emerge in different ways. I have this incredible privilege of being in one place all this time, and seeing the sort of scope or span of somebody’s engagement with the place. And what I think happens is that there are certain kinds of ideas that we should not take for granted, that are different in our settings, that do inform very early on, and shape a trajectory. And people come back for that in different ways. But it is profound. I mean, there is something different about it. And if you were in conversation with them, you’ll pick up certain terms, or a vocabulary, a rhetoric, that will help capture that.

**Participant:**

Jack, we’re all conscious that you’re the first lay president of Georgetown. And I want to take advantage of that to ask for your wisdom in reflecting about the future. What’s your wisdom, at this point, in speaking about the church, the broader church, of the leadership question of the institutions? Institutions that, inevitably, will be in the hands of lay people. Are we doing enough? Should we be doing more?

**Jack DeGioia:**

There’s only really one way to explain that I could be in the place that I’m in. And that is that at several points—and some of the people are in this room—but at several points in my career where no one could have imagined that I would be in this role there were people who stepped in, in a way, and taught me something. Or gave me an experience. Or sent me somewhere. Or gave me a piece of advice.

But the way I try to wrestle with this back home is, are we providing opportunities for our young people to get experiences that will enable them to continue to develop?

But there’s a sadness to that, too. And that is that some of our most talented people are not able to develop the capacity for resiliency. And the recognition that, if you want to achieve something at a pretty high level, it requires extraordinary work every day of your life. And it’s that combination of both resiliency and hard work and opportunity [that is needed]. And are we providing our folks with that opportunity to develop the virtues and the experience so that they can take responsible for these places?

**Participant:**

One of the things you mentioned in your early remarks was the notion of networks. And, you know, we are big believers in that. And what we’ve created here is really a network to try to identify best practices. And we’re obviously focused on the temporal issues. But the university community is one of the most important examples of how the lay involvement has been a contributor to the great success. And I guess the question is, what suggestions do you have for this group, in terms of how we should be interacting with you and your confreres at leadership level, in terms of assisting the church that we all love, that, from our vantage point, is in need of help in these temporal areas? And how can we partner in a more
real, constructive, and pervasive way in order to make sure that we continue to, as a church in the United States, contribute to the welfare of the United States?

Jack DeGioia:

I think it's a great question. Where universities are the best is where we engage in a discrete project with a clear focus. A clear set of deliverables. A clear time horizon. Where we can pull people in. We know what the financial requirements are. And we can draw upon extraordinary talent. But we can't assume it will continue beyond a very focused period of time. You know, we have this extraordinary kind of paradox about a university. We're 220 years old. But you could also look at us and say, “Maybe they're 30 years old,” if you look at the sort of high end of how long people have been in the community. These are actually pretty young places at any given moment because of the turnover of students and faculty. So, the project-oriented focus recognizes that, you know, we're on for 14 weeks. We go home for a month. We're back for 14 weeks. We go home for four months.

If you recognize the rhythms and the structure of the academic calendar, the demands on the faculty normally, you can call upon these resources. But it really needs to be in very targeted and precise ways. And I think, if you identify, you know, two or three projects, and you toss it up to the kinds of folks that you have in this room, I have no doubt you'll have takers among universities who would say, “That makes perfect sense for where we are.”

Frankly, what we're doing in India right now is we're trying to figure out what Georgetown's footprint is going to be in India. I'll tell you a quick funny story. I'd never been to China. I was sitting down with one of my colleagues who was probably head of a top 150 university. He was exhausted. I looked at him, I said, “Why are you so tired?” He said, “I just got in from Beijing.”

So, I said, “What are you doing in Beijing?” He said, “Outsourcing back office labor costs.” I said, “What are you going to save?” He said, “25 million dollars.” That got my attention. But as I reflected on it, our first move into China couldn't be to reduce labor costs! I mean, a Catholic and Jesuit university going into China, that can't be our first move.

Now, we make that move at some point. Because, you know, that's a global economy. Well, similarly in India. Where do we fit there? Well, we wanted to start with the Church. We wanted to figure out where we could be of support with the Church in a way that made sense. And when they came to me and said, “Would you be willing to gather a group of us together to talk about how we might work on HIV/AIDS,” we did. And one of our colleagues, the Dean of Loyola Chicago, came because he had an interest in it. And he pulled a lot of folks together from our network. But it was a concrete way of doing it. And I think with the talent that you have here representing higher education, discrete projects, I think, would be the way to go.
Participant:
The Holy Father was here a couple of months ago. And many people expected that he would chastise Catholic higher education.

Jack DeGioia:
Yeah, we didn’t. We were—you know, I was asked consistently ahead of time, “What do you expect?” I said, “I expect to be inspired and encouraged.”

Participant:
Right. And, indeed, his message was very affirming to Catholic higher education. So, does that prompt you to discussion at Georgetown or among the associates of Catholic colleges and universities about what the message he brought was?

Jack DeGioia:
It’s a great question. I think all of us came away truly encouraged and inspired that the framework that we’ve been developing and using to try to strengthen our identity, is appreciated and recognized. And it was really in two different contexts.

One was the talk he gave to all the educators. He also had one with those engaged in inter-religious understanding. And that was even—well, it couldn’t have been better. But it was just a beautiful a talk, in terms of encouraging the nature of the work. What I suspect will unfold is that a number of us will feel a sense of confidence and empowerment to continue to move forward in the kinds of ways in which we’ve been working. And I think it’s going to be an exciting next period for all of us to wrestle with this.

The thing from the Holy Father’s talk that I have wrestled with most has been on this engagement with culture. And it’s because it’s the hardest one to think about, to talk about, to structure around. We’ve been trying a bunch of different things. And I know with my colleagues, we could spend the rest of the day telling stories about how we’ve wrestled with this.

You know, this is our moment to step into the public arena with a message that is countercultural, but is necessary at this time. And I think it’s plausible, in a way that, perhaps, could not have been heard a generation ago. We have some things to say and it’s now our moment to say them. And so I felt encouraged and empowered in a religious way, and on the stuff we do in social justice. But engaging the public arena is the one where I really feel I came away empowered.

Participant:
I work for the Archdiocese of Chicago. And we are involved in a project with Loyola University. I wondered if you had any comments on how Catholic universities and dioceses and churches might better relate. Sometimes it’s not great. Sometimes it’s wonderful.
Jack DeGioia:

It would be presumptuous of me, because I’ve been 33 years at Georgetown. I’m a parishioner at Holy Trinity. I was married there. My son goes to school there. My life is there. We do a lot of collaboration. But it’s because we’ve had this seamless flow of people in and out of the Jesuit community. We take them. They take us.

But the parish and the university are two distinct entities. And that is an important distinction—there may be some things to learn from that. But we do have so much common history together. My answer would be that it doesn’t really matter who the partner is. I think if there’s a sensible project, we—universities—have this experience with all sorts of other kinds of organizations.

Social justice work in the city. Soup kitchens. Schools. Charter schools. This is not an unusual kind of issue for a university to wrestle with. Where they work is when you have a real, discrete project where both partners have something that they really want to see done. And want to make happen. And when that’s not the case—when it’s a reluctant partner because of suspicion, doubt, trust, or really questioning the value—it never works. But if there’s a real project that builds to the strength and the interests of both parties, that’s where it works.

Archbishop Hughes:

Thank you Dr. DeGioia. This is in connection with the culture issue. We know now that approximately a third of those who have been baptized Catholics have moved to either not practicing at all or to some other church, or other religion.

And we bishops have wrestled with this. And we’ve made our mistakes with regard to catechesis. We’re trying to grapple with that now in the review of catechetical texts. But one of the factors, I’m convinced, is that young people are never introduced to an adult understanding of the faith in an organic and systematic way. And they don’t know what they’re walking away from when they leave. Is that a question you’re looking at and ready to explore?

Jack DeGioia:

Without a doubt. And let me tell you just a quick story about this. We’re trying a bunch of different things in Catholic campus ministry. The sort of interesting thing about our campus ministry program is that we made a decision, you know, I’d say 40, 50 years ago, that we were going to try to provide for the needs of our community on our campus. So we wouldn’t give to students who were Jewish a map to the local synagogue. We would provide a rabbi at Georgetown. And then they could determine whether they want to go to the synagogue or not.
Same with Protestant ministry—but, you know, just by virtue of the numbers, the dominant ministry at Georgetown is the Catholic campus ministry. And when Phil Burrows came aboard as our vice-president for mission and ministry, we began wrestling just with this question. And, you know, with great clarity, our students simply did not have the religious literacy at the level that they needed—that we thought they needed. So, we went out to solicit some philanthropic support. And we got a grant. And the grant was to enable us to do catechetics for our Georgetown students through Catholic campus ministry.

So, Phil Burrows came into the first meeting with all the other campus ministers. And he said, “I just want you to know I got this wonderful gift to be able to do catechetics, because I have found that our Catholic students simply just don’t have the depth of knowledge that we would’ve assumed, perhaps, a generation ago.” And the rabbi says, “Wait a minute. I need some of that money. Our Jewish kids didn’t have that.” And the imam, “I need some of that money, the Muslim kids don’t know that either.”

So, we find that this is a bit of a ubiquitous challenge right now, and that, while there’s a great deal of religious practice, there is a depth that is not being attended to. That would also come back to the question of how we sustain that identity over time. And so, we’re wrestling with this in a couple of different ways. You know, on the one hand, we feel really good about how we’re exposing our students to their spiritualities. On the other hand, we recognize that, if that’s not grounded in a real solid understanding of the basic terms of our faith, this can get lost. And so, that’s a piece of how we are trying to wrestle.
Appendix B

Introduction to the Parish Ministry Assessment Tool

Mr. Jim Lundholm-Eades, Director of Planning, Archdiocese of St. Paul-Minneapolis

A committee of the Leadership Roundtable has been working on the development of a Parish Ministry Assessment Tool. The purpose of this afternoon's small group sessions is to introduce you to this tool and benefit from your insights and best advice. Instead of going through what the tool is, I just want to tell you a little about the thinking behind it. The task given to us was to look at best practices in Church management. An easy trap to fall into would have been to write down a list of best management practices within churches. The trap is that what's considered best practice in one parish isn’t necessarily best practice in another. We could have ended up with a list of best practices that wouldn’t have had any real use or long-term value.

What we chose to do instead was look at the effects of best practices within a parish, realizing that if a parish is really well managed, common themes and characteristics can apply across all parishes. So, rather than tell everybody (based on our own expertise and wisdom) what we thought best practices were, our goal was to produce something that would allow people at the parish level—and it’s scalable, by the way, to the diocesan level—to determine whether they were moving into the area of best practice, and what to pay attention to if they wanted to improve. In short, we wanted to create something that was easy to use.

We recognized that parishes needed a simple way of looking at the cultural context of each parish. And that, in turn, gives the parish insight into the cultural context of its management. The way we framed this was to look at it in terms of preference—preference for the ordained or preference for the laity. What we came up with was a grid that’s very easy to use.

Essentially, the first part of the Parish Ministry Assessment Tool provides parishes with the ability to assess the health of their culture in terms of the relationship between the ordained and the laity, since that relationship significantly influences the quality of management. That cultural context of management in churches is the first part of this tool. The second part is a series of six score cards that look at six different dimensions of parish life and how they’re managed. When these six dimensions are scored out, the parish ends up with a set of scores it can use diagnostically to show where it needs to pay attention to improve and move into best practices. As I said earlier, it’s not based on us telling them what best practices are but, rather, if you have best practices, these are the conditions that exist in your parish.
And remember, it’s scalable to the diocesan level. At the end of the process is a visual representation of the outcomes, which can be used with Church leadership, hospitals, parish councils, finance councils, and the like. This lets them know where they need to put their resources to improve the system.

As for the Parish Ministry Assessment Tool itself, we’ve tried it out in about 40 parishes, and found it to be easy to use. We’ve framed it in a way that you don’t need to be an expert to run it. You can even change the weightings within the score cards to suit your particular culture.

Finally, I’d like to express my thanks to the Leadership Roundtable for the opportunity to do this kind of work. We’ve been using the Parish Ministry Assessment Tool in our own diocese, and I know it’s been used in several others. What it gives us for the first time is the ability to accurately assess where we are with regard to management of our parishes.

The Parish Ministry Assessment Tool is available from www.churchEpedia.org, in the Management section, under Parish Scorecard.
A “big picture” view of parish life can be invaluable in assessing ministry and management.

Scorecards provide a comprehensive analysis of parish ministry, management, financial practices, and participation.

Six Scorecards for Sound Church Management

<p>| SCORECARD A: Quality of, Access to &amp; Satisfaction with Ministry |
| Measure: Assessing practices, access, and satisfaction |</p>
<table>
<thead>
<tr>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Progress</th>
<th>5 Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Overall quality of parish liturgy (including preaching, music, welcoming spirit)</td>
<td>40 %</td>
<td>Moderate to highly rated in all categories by &lt; 30 % of parishioners</td>
<td>Moderate to highly rated in all categories by &lt; 40 % of parishioners</td>
<td>Moderate to highly rated in all categories by &gt; 40 % of parishioners</td>
<td>Highly rated in all categories by &gt; 55 % of parishioners</td>
</tr>
<tr>
<td>B. Overall quality of faith formation and religious education (all ages, all programs, including Catholic school if present)</td>
<td>20 %</td>
<td>Moderate to highly rated in all categories by &lt; 30 % of parishioners</td>
<td>Moderate to highly rated in all categories by &lt; 40 % of parishioners</td>
<td>Moderate to highly rated in all categories by &gt; 40 % of parishioners</td>
<td>Highly rated in all categories by &gt; 55 % of parishioners</td>
</tr>
<tr>
<td>C. Quality of pastoral care across all ages and circumstances of life</td>
<td>20 %</td>
<td>Moderate to highly rated in all categories by &lt; 30 % of parishioners</td>
<td>Moderate to highly rated in all categories by &lt; 40 % of parishioners</td>
<td>Moderate to highly rated in all categories by &gt; 40 % of parishioners</td>
<td>Highly rated in all categories by &gt; 55 % of parishioners</td>
</tr>
<tr>
<td>D. Quality service outreach and justice advocacy</td>
<td>20 %</td>
<td>Moderate to highly rated in all categories by &lt; 30 % of parishioners</td>
<td>Moderate to highly rated in all categories by &lt; 40 % of parishioners</td>
<td>Moderate to highly rated in all categories by &gt; 40 % of parishioners</td>
<td>Highly rated in all categories by &gt; 55 % of parishioners</td>
</tr>
</tbody>
</table>
## Six Scorecards for Sound Church Management (Continued)

### SCORECARD B: Governance, Consultation, and Decision Making

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Progress</th>
<th>5 Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Knowledge of and comfort with parish governance and system of consultation and authority: clarity of purpose, role, and relationship</td>
<td>20 %</td>
<td>Avoidance and/or denial of Catholic Church consultation and roles among ordained, staff, or lay leaders</td>
<td>Little knowledge and acceptance of Catholic Church consultation and roles among ordained, staff, or lay leaders</td>
<td>Moderate knowledge and acceptance of Catholic Church consultation and roles among ordained, staff, and lay leaders</td>
<td>Broad knowledge and acceptance of Catholic Church consultation and roles among ordained, staff, and lay leaders</td>
<td>Broad knowledge and acceptance of Catholic Church consultation and roles among ordained, staff, and lay leaders</td>
</tr>
<tr>
<td>B. Parish consultative bodies and structure</td>
<td>20 %</td>
<td>Occasional meetings of consultative bodies of laity for finances only</td>
<td>Occasional meetings of consultative bodies of laity for ministry, finances, risk assessment, administration</td>
<td>Moderately active consultative bodies of laity for ministry, finances, risk assessment, administration</td>
<td>Moderately active and engaged consultative bodies of laity for ministry, finances, risk assessment, image management, administration</td>
<td>Highly active and engaged consultative bodies of laity for ministry, finances, risk assessment, image management, administration</td>
</tr>
<tr>
<td>C. Consultative bodies and structure</td>
<td>35 %</td>
<td>Lay bodies of consultation exist but operate with limited scope and purpose</td>
<td>Lay bodies of consultation are engaged in meetings to “listen”</td>
<td>Most lay bodies of consultation are engaged in critical questions formed by the pastor</td>
<td>All lay bodies of consultation are engaged in critical questions formed by the pastor and lay leadership and contribute in a demonstrable manner</td>
<td>Lay bodies of consultation are publicly noted by the pastor for their impact and value to the local Church</td>
</tr>
<tr>
<td>D. Decision-making includes</td>
<td>25 %</td>
<td>&lt; 50% of critical planning, strategic, and financial decisions employ a–c</td>
<td>&lt; 70% of critical planning, strategic, and financial decisions employ a–c</td>
<td>&gt; 70% of critical planning, strategic, and financial decisions employ a–c with data and analysis supporting most/all key decisions</td>
<td>&gt; 80% of critical planning, strategic, and financial decisions employ a–c with data and analysis supporting all key decisions</td>
<td>&gt; 90% of critical planning, strategic, and financial decisions employ a–c with data and analysis supporting all key decisions</td>
</tr>
</tbody>
</table>

### Decisions include
- Use of data & analysis
- Consistent, explicit use of process
- Clarity of roles and authority
Six Scorecards for Sound Church Management *(Continued)*

### SCORECARD C: Planning, Structure, and Systems

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Progress</th>
<th>5 Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Effectiveness of strategic plan for ministry; degree of alignment of ministry, budget, and plan</td>
<td>30 %</td>
<td>No strategic plan for ministry, evidence of personality-driven planning</td>
<td>Strategic plan for ministry without alignment of ministry, budget, and plan</td>
<td>Strategic plan for ministry with high degree of alignment of ministry, budget, and plan and with track record of some success</td>
<td>Strategic plan for ministry over time with high degree of alignment of ministry, budget, and plan and with track record of high levels of success</td>
<td>Strategic plan for ministry over time with high degree of alignment of ministry, budget, and plan and with track record of high levels of success and parishioner support</td>
</tr>
</tbody>
</table>

B. Operational practices

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Progress</th>
<th>5 Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policies, procedures and practices are to a great extent missing, ignored or deliberately avoided, or mis-aligned with planning, Canon law, and/or civic law</td>
<td>15 %</td>
<td>Policies, procedures and practices are rudimentary, not known, rarely used, and not aligned with planning, Canon law, and/or civic law</td>
<td>Policies, procedures and practices are rudimentary, somewhat known, sometimes used, and mostly aligned with planning, Canon law, and civic law</td>
<td>Policies, procedures and practices are well formed, known, used effectively, and aligned with planning, Canon law, and civic law</td>
<td>Policies, procedures and practices are well formed, known, used effectively, and aligned with planning, Canon law, and civic law</td>
<td></td>
</tr>
</tbody>
</table>

C. Human Resource Management

- Employment policies and practices are complete, published, and comply with diocesan policy and civil law
- Employees have regular formation and education opportunities
- Supervisory system exists and used

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Progress</th>
<th>5 Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource capacity in all 3 areas is less than 80 % of existing and expected needs</td>
<td>20 %</td>
<td>Resource capacity in all 3 areas is 90 % or less of existing and expected needs</td>
<td>Resource capacity in 2 of the 3 areas is at least 95 % of existing and expected needs</td>
<td>Resource capacity in all 3 areas is at least 95 % of existing and expected needs and meets all criteria; policies and procedures are regularly reviewed and updated; strategy, staffing and budget are aligned</td>
<td>Resource capacity in all 3 areas equals or exceeds existing and expected needs</td>
<td></td>
</tr>
</tbody>
</table>

D. Capacity

- Physical resources
- Human resources
- Financial resources

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Progress</th>
<th>5 Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absence of evaluation and feedback for planning, ministry, and administration</td>
<td>15 %</td>
<td>Limited evaluation and feedback for planning, ministry, and administration</td>
<td>Some use of measurement and improvement in planning, ministry, and administration</td>
<td>Consistent use of measurement and improvement in planning, ministry, and administration</td>
<td>Consistent and creative use of measurement and improvement in planning, ministry, and administration</td>
<td></td>
</tr>
</tbody>
</table>

E. Continuous Improvement through evaluation and refinement
## Appendix

**Six Scorecards for Sound Church Management (Continued)**

### SCORECARD D: Communications: Internal and External

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>Intervention</th>
<th>Concern</th>
<th>Acceptable</th>
<th>Progress</th>
<th>Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. Number of channels</strong>&lt;br&gt;(bulletin, web presence, etc.)</td>
<td>40 %</td>
<td>Very limited (1–3) use of communication channels with little feedback as to effectiveness or perceived value from parishioners</td>
<td>Limited (3–5) use of communication channels with little demonstration of parish subgroup awareness or concern</td>
<td>Array of communication channels employed based on demonstrated understanding of parish subgroups and preferences</td>
<td>Array of communication channels employed based on demonstrated understanding of parish subgroups; data-based evaluation confirms effectiveness</td>
<td></td>
</tr>
<tr>
<td><strong>B. Level of connection and interactivity</strong></td>
<td>20 %</td>
<td>Absence of any form of substantive awareness, data, or analysis regarding connection to parishioners through communications</td>
<td>Demonstrated ability of communications to connect with at least 50 % of parish on a semi-monthly basis</td>
<td>Demonstrated ability of communications to connect with at least 70 % of parish on a semi-monthly basis</td>
<td>Demonstrated ability of communications to connect with at least 80 % of parish on a monthly basis</td>
<td>Demonstrated ability of communications to connect with at least 80 % of parish on a monthly basis through more than one communication channel</td>
</tr>
<tr>
<td><strong>C. Impact on planning</strong>&lt;br&gt;• ministry delivery&lt;br&gt;• decision-making</td>
<td>30 %</td>
<td>Outcomes from communications not being measured or assessed in any manner</td>
<td>Outcomes from communications considered to have a limited impact on planning, ministry delivery and decision-making</td>
<td>Outcomes from communications interpreted and considered to have impact on planning, ministry delivery and decision-making</td>
<td>Outcomes from communications clearly and positively impacting planning, ministry delivery and decision-making</td>
<td>Outcomes from communications clearly impacting positively and substantially planning, ministry delivery and decision-making</td>
</tr>
<tr>
<td><strong>D. Image and identity</strong>&lt;br&gt;• parish/diocese&lt;br&gt;• Church in the public square</td>
<td>10 %</td>
<td>Communications, perceptions and public relations regarding parish, diocese, and/or Church creating highly to moderately negative public image and identity</td>
<td>Communications, perceptions and public relations regarding parish, diocese, and/or Church creating negative to neutral public image and identity</td>
<td>Communications, perceptions and public relations regarding parish, diocese, and/or Church creating neutral to positive public image and identity</td>
<td>Communications, perceptions and public relations regarding parish, diocese, and/or Church creating moderate to highly positive public image and identity</td>
<td>Communications, perceptions and public relations regarding parish, diocese, and/or Church consistently creating moderate to highly positive public image and identity</td>
</tr>
</tbody>
</table>

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**Note:**
- Each row in the table represents a different measure of communication effectiveness, with corresponding weights and descriptions of outcomes ranging from very limited to highly positive effects on planning, ministry delivery, and decision-making. The table format allows for easy comparison and analysis of different communication strategies and their impact on various aspects of church management.
### Six Scorecards for Sound Church Management (Continued)

<table>
<thead>
<tr>
<th>Measure: Participation in the Life of the Church</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Progress</th>
<th>5 Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Participation in leadership (councils, commissions, committees, etc.)</td>
<td>10 %</td>
<td>&lt; 2 % of adult registered parishioners engage in leadership annually</td>
<td>&lt; 3 % of adult registered parishioners engage in leadership annually</td>
<td>&gt; 3 % of adult registered parishioners engage in leadership annually</td>
<td>&gt; 5 % of adult registered parishioners engage in leadership annually</td>
<td>&gt; 8 % of adult registered parishioners engage in leadership annually</td>
</tr>
<tr>
<td>B. Participation in ministry</td>
<td>20 %</td>
<td>&lt; 20 % of registered parishioners engage in ministry annually</td>
<td>&lt; 30 % of registered parishioners engage in ministry annually</td>
<td>&gt; 30 % of registered parishioners engage in ministry annually</td>
<td>&gt; 40 % of registered parishioners engage in ministry annually</td>
<td>&gt; 50 % of registered parishioners engage in ministry annually</td>
</tr>
<tr>
<td>C. Participation in Sunday Mass (includes on Saturday evening)</td>
<td>40 %</td>
<td>&lt; 40 % of registered parishioners at Sunday Mass weekly</td>
<td>&lt; 60 % of registered parishioners at Sunday Mass weekly</td>
<td>&gt; 60 % of registered parishioners at Sunday Mass weekly</td>
<td>&gt; 70 % of registered parishioners at Sunday Mass weekly</td>
<td>&gt; 80 % of registered parishioners at Sunday Mass weekly</td>
</tr>
<tr>
<td>D. Participation in financial stewardship</td>
<td>30 %</td>
<td>&lt; 50 % of HH</td>
<td>&lt; 64 % of HH</td>
<td>64 – 69 % of HH</td>
<td>69 – 74 % of HH</td>
<td>&gt; 75 % of HH</td>
</tr>
</tbody>
</table>

#### Note on “Registered Parishioners”:
This scorecard aims to quantify what percentage of the parish’s registered parishioners donate time, talent and/or treasure, or are “active” at the time this tool is utilized. Given the nature of parish life and the limited resources most parishes are able to spend on keeping an accurate database, it is assumed that “registered parishioners” include those who have moved away, may be registered at more than one parish, do not come to Mass, who register but contribute neither time, talent, nor treasure, or who register simply to be able to celebrate a sacrament. It is also understood that many parishes have people who do contribute time, talent, and/or treasure but are not formally “registered” with the parish. Therefore, the number of “registered” parishioners (the denominator), will be larger than the number participating in leadership, ministry, liturgy, or contributing financially (the numerator). The measures above are not mutually exclusive; it is expected that many of the same parishioners would be counted in more than one measure.
### Six Scorecards for Sound Church Management (Continued)

**SCORECARD F: Financial Resource Development**

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Progress</th>
<th>5 Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Parish and diocesan capital campaigns and stewardship programs operate within the context of mid and long term planning</td>
<td>20 %</td>
<td>There is no planning context.</td>
<td>Planning as a mission and vision, but little analysis of the current reality or roadmapping of the next 1–2 years.</td>
<td>Planning has mission, vision, some assessment of the current reality and roadmapping of the next 1–2 years.</td>
<td>Planning has clarity of mission, vision, assessment of the current reality, strategic directions, and roadmapping of the next 1–2 years.</td>
<td>Planning has clarity of mission, vision, assessment of the current reality, strategic directions, and roadmapping of the next 1–2 years, and benchmarks for progress.</td>
</tr>
<tr>
<td>B. Feasibility studies for capital campaigns are based in competent analysis and verifiable data</td>
<td>30 %</td>
<td>There is no data or analysis.</td>
<td>There is data but no analysis.</td>
<td>There is relevant data that is not verifiable and some analysis.</td>
<td>There is relevant verifiable data and competent analysis.</td>
<td>There is relevant verifiable data and competent analysis that estimates the potential for achieving goals based in research.</td>
</tr>
<tr>
<td>C. The most recent parish capital campaign met goals</td>
<td>25 %</td>
<td>Campaign met less than 60% of goals.</td>
<td>Campaign met 60% of goals.</td>
<td>Campaign met 75% of goals.</td>
<td>Campaign met 100% of goals.</td>
<td>Campaign exceeded goals.</td>
</tr>
<tr>
<td>D. Parish stewardship program met goals</td>
<td>25 %</td>
<td>Stewardship program met less than 60% of goals.</td>
<td>Stewardship program met 60% of goals.</td>
<td>Stewardship program met 75% of goals.</td>
<td>Stewardship program met 100% of goals.</td>
<td>Stewardship program exceeded goals</td>
</tr>
</tbody>
</table>
Appendix C

Leadership Roundtable
Best Practices Award

Mr. Geoffrey T. Boisi, Chairman, National Leadership Roundtable on Church Management

A few years ago we instituted the Leadership Roundtable Best Practices Award. This was an award that was established to recognize and promote best practices in the areas of Church management, finances, and human resource development. The inaugural award was given to the Archdiocese of Boston for its level of financial reporting and for the extraordinary work it did to simplify and explain, and to make public and accessible, a comprehensive archdiocesan financial picture. It’s been a real gift to the Church. Last year, the Leadership Roundtable honored the St. Vincent de Paul Society of Baltimore for implementing the Standards for Excellence: An Ethics and Accountability Code for Nonprofits. Hopefully you have all had the opportunity to use and review our version of the Standards for Excellence for the Catholic sector. Hopefully you will all agree that it is a gift to the Church as it is rolled out across the country. Last year we also honored the Center for Social Concerns at the University of Notre Dame, which has been and continues to be a phenomenal performer, for the engagement of students and graduates in the leadership of the Church.

This year, our honoree reflects our emphasis on managerial excellence and visionary leadership. Tonight, we honor the Diocese of Memphis Catholic School System. The Catholic Schools Office of the Diocese of Memphis has established an extremely strong record of visionary leadership and management, a system change for a 10-year period of time.

Bishop Steib articulated a strong and clear vision for the Catholic school mission and values in his diocese, and for reopening and sustaining Catholic schools in the inner urban section of his city. Dr. Mary C. McDonald, the superintendent of the Catholic school system, has carried out that mandate in an extraordinary fashion over the last few years.
The schools office developed a clear 10-point statement of beliefs that guides the planning, the management, the development, and the evaluation of all the Catholic schools. The statement incorporates goals of faith formation, individual human development, supportive learning environments, high academic achievement, standards, performance, and collaboration and communication. It’s a real benchmark for the country, and as you learn more about it I think you’ll see why we feel so strongly about it.

They also have developed a statement of system-wide student expectations across seven formation skill sets. Performance and accountability requirements for teachers as well as students are set and maintained. Given the kinds of philosophies that you have heard coming from us for the last five years, you know that that is all music to our ears.

In 1999, Bishop Steib challenged the Memphis community to collaborate to reopen eight Catholic primary schools that had closed. These schools are called “Jubilee Schools”; they were reopened and now enroll over 1,200 students. Private foundations and business donors contributed to the creation of the Catholic Memphis Urban Schools Trust, which is currently capitalized at over $45 million. This trust, with its public board and transparent accountability, enables the Jubilee Schools to operate without debt, charging going rates of tuition while supporting lower-income student families who are unable to pay the tuition rates. The Catholic schools of Memphis report student achievement rates that are superior to those of public schools in their same neighborhoods. Memphis Catholic High School has incorporated strong partnerships with the business community by offering work experience internships with 28 Memphis businesses for students who want to participate in them. They have combined the ultimate motivation: a great education for kids and an understanding of the world of work, and they’ve developed that with an accountability system for everybody in the chain. Enrollment in Catholic Memphis schools has grown to its highest level since 1975, increasing from 6,400 students in 1996 to just shy of 8,800 students in 2007. Every school in the diocesan school system, plus the system itself, has been accredited by the Southern Association of Colleges and Schools. It is only the second diocese that we are aware of that has accomplished that.

Citation: Best Practices Award to the Diocese of Memphis Catholic School System, in recognition of your outstanding commitment to excellence and visionary leadership in Catholic education, presented by the National Leadership Roundtable on Church Management, June 26, 2008.

Most Rev. J. Terry Steib

When I came to this meeting it wasn’t to receive this plaque. It really was to find out what the Leadership Roundtable is all about. I’m going to accept this award on behalf of all of the principals, administrators, teachers, volunteers, staff, particularly in our Jubilee Schools and in all of our schools, because they are the ones who looked at the vision of what we were trying to do and decided to step up to make it happen.

Let me just give you a little flashback on it, it was not as easy as it seemed. I think there was one point where we were talking about closure of schools, particularly our high schools. We had too many Catholic high schools in the city of Memphis, but we said we are not in the mode of closure. We have to do better marketing. That’s when we were talking about change of leadership in the
school office, and I was saying that I want a new paradigm. I wanted to move away from the old paradigm of just maintaining schools that were in locations where they were affordable, and closing them where they were not affordable, but still needed. That's not the Catholic way. Ours is to go out, and to proclaim, and to make people better, and I was not going to allow us to build new schools in suburbia while closing them in the inner city areas. That's not who we are as Catholics. We have to live out our Catholic role, we have to be going out to proclaim. We have to bring the gifts that we have to people who need our resources, who need our talents. The Catholic Church is good in education. I said I would not rest until that was accomplished. Then the night after I had written that article, I said “My God, what did I say?”

Sure enough, folks called and said, “Are you serious?” And we answered “Yes, we're serious.” They asked if they made this possible, would we do it. I told them that we would. That's when Dr. McDonald hopped in on the scene and we met with the anonymous donors. We started off with one school and they said they would help out with that. Then they came back to us and said we heard you had closed several schools in the diocese. They asked how many there were, to which we said “Six.” They asked if they made it possible would we be willing to open the school and we said “Yes, in a heartbeat.” Then we had Dr. McDonald give them all the figures and what would we need to be done with that and we worked and we said “Okay, we have heard this before,” and we did not want any IOU’s or credit cards. We wanted cash on the line. They said “Okay.” From there we started moving, we opened all six schools, they set up a scholarship fund for us, and whatever it would take to retrofit the buildings because some of them have been closed for 30 years. We would have funds for that, and as the students came online for each grade, they would handle that.

Then it moved to us creating a partnership with them, so it was not the diocese per se, but it was the group that was operating that. I think the turning point for us was when a group from the university, who are now young adults and working, called themselves the Blue Streak from one of the Jubilee Schools, and decided to offer and create scholarships for the Jubilee Schools. It started with about 5 of them. They were looking to do one scholarship per year. Now this has grown to about 300. This to me was when it turned over and the people took over. The people decided this is what we wanted, and this is how we are going to make it work. We then put in place people who were good and talented and could do the work. They could do the managing of the funds, they could go out and do the marketing, and they could make sure that the budgets of the schools were operating correctly. But we didn’t stop there. We said, “If we are teaching the kids that are coming from poor areas, what happens when they go back home again?” So we decided this was going to be more than a kiddie school, it was going to be with the parents also. So we got the parents involved in the teaching of our schools, with the guidelines that we have provided for them and also with the idea of training them so they could get their GEDs so they could get better jobs. The student moved from grade to grade, the economy of the parents could move up more, so they could pay more and more and that's how the process is working.
Our whole point as a Church was not to do it just from a business point of view, but also from a spiritual point of view. As a Church, this is how we do evangelization and believe me, it’s working.

I am proud to say that just this past May we went to one of the Jubilee Schools, where 22 are graduating and they are going to Bishop Burns, Memphis Catholic, IC, or one of the other schools. All of them are staying within the Catholic school system and moving up. We can go to the mayor and to the people in Memphis and say we have something good. We have developed good Catholics, good Christians, good citizens, and good future tax payers. How do they lose on that? Our whole point as a Church was not to do it just from a business point of view, but also from a spiritual point of view. As a Church, this is how we do evangelization and believe me, it’s working. There are some who are coming into the Church.

Let me tell you a quick story. One of the teachers took one of the kindergarten classes to our county fair. The teacher took them to a place where there was a lady teaching people how to arrange flowers. The children sat there fascinated. The lady engaged them in conversation and asked where they were from. The children answered, “We are from St. Augustine’s. We go to school there.” They said to the lady, “You know, you are just like our pastor, he can change things around like you can.” The lady asked, “What can your pastor do?” The children said, “Our pastor can take bread and wine, and turn it into the body and blood of Christ.” If that’s not evangelization for you, I don’t know what is.

Our goal continues because we are trying to create one Catholic school system throughout all of Memphis so that students can go in from wherever they are and move on and be educated. That’s our goal.

Dr. Mary C. McDonald

On behalf of the leadership and management, at all levels of our Catholic schools, and Catholic Schools Office, I thank you for this very great honor you bestow upon us. On behalf of those who work in this Church ministry, I express our gratitude for the work of the Leadership Roundtable in promoting the best practices in leadership and management. It is those practices that will lift our Church and position it to continue to proclaim the Good News of Jesus Christ in ways that promote a culture of participation and accountability. Your Standards for Excellence leads the way for all who are involved in ministry in our Church. You are the change that will change us for the better. I thank Bishop Steib, who, in
1998, appointed me Superintendent of Catholic Schools. His vision, and trust in me, paved the way for us to reclaim the great heritage of Catholic education in our Diocese. His invitation to me was one of partnership. He gave me the freedom to be a risk-taker, to create a new paradigm for Catholic schools and to reinvent the way we do business. My responsibility was not only to address the educational challenges we faced and garner financial support, but also to change the culture of Catholic schools and the Catholic Schools Office. I believe that Bishop Steib recognized that I am Memphis on the outside, and Philadelphia on the inside, and didn’t mistake niceness for weakness.

Thank you, Bishop, for taking a risk on me, and if ever you do get gray hair, I’ll take the blame for every one of them.

In 1998 the Catholic schools in the Diocese of Memphis mirrored the situation of dioceses all across the country. We had 16 schools, and 5 of them in the urban area were failing and about a year away from closing. There was a need for more schools in the suburban areas where the Catholic population had shifted, but we had no money to build them. And, sadly, all of our inner-city schools had closed. The Catholic Schools Office had functioned since its inception in a caretaker mode with no plan for the future in place. The road to the demise of Catholic schools was being paved with benign neglect. As in many organizations, turf wars were waged at all levels and departments of operations from silos of self-protection. The problems were systemic. If there was to be any hope of a turnaround for our Catholic schools, the Catholic Schools Office needed systemic change. It needed to be united with all schools and diocesan departments, to become a support for the schools, to be proactive in positioning them for success. It needed to be led from that caretaker stage through an entrepreneurial phase and on into a professional management system able to support and grow a school system that implements the mission of the Church to lift up—educationally, socially, and spiritually—all God’s children through the great gift of Catholic education. But Catholic education had become devalued. It had taken a downturn in a soft educational market.

... nobody does faith-based schools like the Catholics.

At this same time there was in Memphis a small but committed group of non-Catholic leaders who refused to stand by while a failing city school system graduated an undereducated workforce. They had the resources to intervene but wanted to be as strategic in this investment in education as they were in their businesses. They wanted to make a difference. They were not donors; they were investors, venture philanthropists. They looked at the Catholic schools, and the empty school buildings, as resources that with an infusion of capital and strong leadership could become beacons of hope in the neighborhoods of burnt-out buildings and crack houses, overrun with gangs, drugs, prostitution, and violence. These investors were convinced that faith-based schools would make the difference that the city, and the children and families living in poverty in these neighborhoods, needed. And nobody does faith-based schools like the Catholics.
It was by the grace of God that we came together at a meeting in my office, so that together we could be agents for change for the children living in poverty in our city. The partnership we forged was the tipping point in reclaiming the heritage of Catholic education. Our first goal was to reopen our inner-city Catholic schools, schools that had been closed from 8 to more than 50 years.

Key to the success of this total educational effort was the ability of the Catholic Schools Office to provide the educational delivery system, and to ensure the health of all the components of that system.

So in July 1999 we began the Jubilee Schools with one school, one kindergarten class, and 26 students. The systemic change began in these schools, as well as in the Catholic Schools Office. Each of the eight Jubilee Schools reopened one grade at a time, and added a grade a year so that students and parents would learn what a Catholic school is, and what was expected of them. A scholarship trust was established that ensured the scholarships would follow the students from pre-school through twelfth grade in a Catholic school. Every family is expected to pay something toward the tuition of their child, according to their ability to do so. We learned early on that our Jubilee Schools had to meet the basic needs of the families we serve, as well as to educate the children. Hunger was one of the first issues we tackled. We started our food program, serving two full meals a day and sending the children home with backpacks of non-perishable food each Friday so that they would have something to eat on the weekends. We started literacy classes and job training and placement for the parents and guardians who were considered unemployable. We partnered with a multitude of businesses, institutions, and organizations to assist in every aspect of this effort from health care and tutoring to supplying uniforms and needed clothing for school. Our entrepreneurial phase had begun and our inner-city schools became centers of learning for the community, reclaiming the neighborhoods and the hopes and dreams of the children and families in poverty.

It needed to move into a professional management system, with a culture of accountability, good stewardship of finances and talent, succession planning, and leadership development, and to implement a structure of management by teams. We needed to unite ministry and business, leadership and management, vision and focus, in order to ensure the growth of this new paradigm for Catholic schools.
Key to the success of this total educational effort was the ability of the Catholic Schools Office to provide the educational delivery system, and to ensure the health of all the components of that system. In order to support this growth, the Catholic Schools Office itself needed systemic change. It needed to move into a professional management system, with a culture of accountability, good stewardship of finances and talent, succession planning, and leadership development, and to implement a structure of management by teams. We needed to unite ministry and business, leadership and management, vision and focus, in order to ensure the growth of this new paradigm for Catholic schools. We needed to guarantee to our investors that our Catholic schools will continue to be beacons of hope that educate all God’s children, those in poverty and those of a new immigrant population. I believe that it is Catholic education that will lift our country, and our Church. Although many thought this task impossible, we knew that with God, all things are possible.

But the Jubilee Schools do not operate in a vacuum. They are part of the seamless garment of Catholic education in our diocese. We are one body and we work to promote mutual support and concern. At the same time that we were reopening the inner-city schools, our failing schools in the outer city were restructured, and assisted with implementing sound practices in stewardship, and all area of the educational practices. With these schools we started our Urban Initiative Schools. Additionally, the educational needs of the growing Catholic population in the suburbs were addressed with three new elementary schools and a high school built for 1,000 students. During those six entrepreneurial years we collaborated, communicated, and established new partnerships and procedures for the way we did business. We took a three-pronged approach to addressing the educational needs in the inner-city, outer-city, and suburbs to address the specific needs of each area. We spread the good news of Catholic education! Several grassroots efforts of support began, as well as support from foundations and the business community. The gifts and talents of a broad base of support are valued, appreciated, and affirmed.

During the past three years, the Catholic Schools Office has moved into the professional management stage that solidifies the systemic change we sought. We started the Leadership Institute, the Mentor program, the Facilities Maintenance and Consolidated Purchasing program, the Professional Development and Performance Program, the Teacher Recruitment and Retention program, the Finance and Budgeting Practices, our Leadership Teams, and a multitude of ancillary efforts to ensure continuous improvement of the schools as well as the Catholic Schools Office. Through broad-based collaboration we developed our mission statement and our 10 belief statements. Together we developed and implemented our seven standards of excellence for all schools, including two for Catholic identity. And all of our schools were accredited by the Southern Association of Colleges and Schools. In October, 2007, the Catholic Schools Office was accredited by the Southern Association of Colleges and Schools as a School District, one of only two dioceses in the country to receive this status. This holds the Catholic Schools Office to a higher standard of accountability. We have gone from 16 schools 10 years ago to 29 schools today, and our highest student enrollment since 1976. The change was systemic and the growth supported. The change is no longer change, but a part of who we are now. And, with our leadership training program, we are ensuring thorough succession planning, a culture of continuous improvement, accountability and participation by all. Now you know why we refer to the past 10 years as our “Miracle in Memphis.” The credit, honor and glory for this belong to God!
Thank you for recognizing that the work we do is worthwhile and that our Catholic school system is astute in the ways of good management practices as well as in the ministry of education. Know that you and the work of the Leadership Roundtable are always in my prayers, and the prayers of the children in our Catholic schools. Thank you and God bless you!
Appendix D

Chairman’s Update

Geoffrey T. Boisi, Chairman, National Leadership Roundtable on Church Management

Since the idea of the Leadership Roundtable began about five years ago, and was formally incorporated three years ago, we have attempted to accomplish a number of things. The approach we have taken has been very consistent. We have insisted that we be positive and make contributions that are positive and develop relationships within every level of the Church. Personally, I feel we have been pretty good at that. In our hearts and in our actions we are trying to be extremely inclusive and positive.

One of the best things we do in terms of emphasizing the positive is conferring the Leadership Roundtable Best Practices Award. I feel that Bishop Steib and Dr. Mary McDonald were great choices for this year’s award. I know how impactful their presentation was on a lot of us. It shows what real leadership can accomplish within the Church and in a tough situation. We thank them very much for their participation and for sharing with us their story.

A second theme is that we have committed to be solutions-oriented and active. When we bring before you the kind of people who were on our parish panel—Fr. Jack Wall, Leisa Anslinger, and Fr. Joe Donnelly—that to me was an informative, thoughtful, and inspiring rendition of what we are all about. At the parish level, which is where everything really starts, and in some ways ends for all of us in our relationship with the Church, to see when that is done really well is to know how exciting our religion is and how impactful it can be.

The reason we have the quality of people we do in this room, and the time, energy, and talents that you are bringing, is because you have a love of the Church, and you understand the notion of mission.
We also want to acknowledge that we have heard loud and clear the notion of translation of the terminology between the Church and the business world. I know there was a lot of discussion this afternoon and this morning on the Work of Hope document. Not only in this, but in each of the documents that we’ve been preparing, we’ve really poured a lot of time and energy into translating our work into a spiritual dimension, a language that appeals to each of you who are active day to day in the Church, and that captures what the secular world has found to be best practices. It is a good theme to remind ourselves of, and we will continue to do that and get better at it over time. It will be very helpful to us if you could identify interpreters for us who balance and work in both of those worlds.

We’ve tried in everything that we’ve done to be smart, effective, have creative ideas, and identify really talented, experienced, brilliant people.

Stewardship is another notion we have tried to foster. The reason we have the quality of people we do in this room, and the time, energy, and talents that you are bringing, is because you have a love of the Church, and you understand the notion of mission. I’d like to think that everybody believes that we, as an organization, have that deep in our hearts and our souls. It’s pretty tough doing this day in and day out as you do your own work, but it’s possible because you love the Lord and you love the mission of the Church. We have to continue to remind ourselves of that. It’s hard to accomplish the things that we need to accomplish unless we are invested in it. There are people who contribute. And people invest in ideas and they invest in the mission; they invest in the people who do quality work, and for the right reasons. People contribute because they want to be part of something. Here we are talking about one of the most important relationships of our lives, and therefore we’ve invested, and it’s hard to invest unless you have trust and respect for each other. When that’s harmed in some way, you are not facing up to the reality of the situation unless you address that. Maybe we haven’t done it well and maybe we need to figure out a better way to do it, but that’s the reason why we put it on the table.

We’ve tried in everything that we’ve done to be smart, effective, have creative ideas, and identify really talented, experienced, brilliant people. That’s why we asked Fred Gluck and Larry Bossidy to kick this conference off, and hopefully over the past years you’ve felt that the people we’ve chosen to speak to this group and advise this group are in their category. I think for us to accomplish our overall goals, we need to continue to attract more and more people like that.

At the heart of everything is our devotion to the Church.
To hear someone like Larry Bossidy, who was a bit of a skeptic, say today, “You guys have stayed at it and I have a different perspective on this; I’m going to try and figure out how to work with you guys,” to me that’s a great thing. There are a number of people who have important voices like he does, and as we continue to do this and execute at the levels we are, I think we will be able to attract more people like yourselves and like Larry, and if we are smart about it we will be able to transmit our message to millions of people rather than the hundreds of thousands we are currently reaching.

At the heart of everything is our devotion to the Church. I was really happy to hear what Larry said today, particularly about the Church getting beaten up. We are tired of that and we have a lot more pride in something that is so important to us. That’s why I thank Susan King and the great Carnegie Foundation, who are going to help us convene other secular foundations. We are creating a case for the great contribution this wonderful Church of ours has made to this great country, and will start conveying that message and the reasons why these foundations should be contributing to us more than in the past.

You heard my comments earlier that we are really confident about the quality of some of the things we have done, and the quality of the people we have surrounded ourselves with. I think that message is becoming more interesting to the secular media, and in order to achieve the kinds of scalable goals we are talking about we are going to have to do a better job of reaching out to them. Any relationships you have in that regard, or any ideas you have in terms of themes or introductions, would be extraordinarily helpful.

...we have to make sure we capture all the dimensions of the Church, from a socioeconomic standpoint, from a geographic standpoint, and from a cultural standpoint.

In terms of what you can do for us, you’re off to a good start by just being here. Many of your have volunteered to be on various committees and we want you to continue to do that. I would ask each of you to think about one or two people within your sphere of influence—whether it’s your functional area, or your sector of the Church, society, business, or other frame of reference—who could contribute to what we’re doing in terms of their intellectual talent, their presence in the community, their voice in the community, or in any other way, we would like to have you nominate them to be part of our council.

Many of you represent organizations that have tremendous influence throughout the Church. If you feel confident in the quality of our people, and you feel what we’re doing is worthwhile, then we will achieve our goals.
Along the lines of the conversation we had yesterday on the inclusiveness of our desires, we have to make sure we capture all the dimensions of the Church, from a socioeconomic standpoint, from a geographic standpoint, and from a cultural standpoint. This has been an objective of ours from the very beginning, and we have not yet accomplished it. If any of you, in terms of your spheres of influence, can bring more diversity to this body, we are very desirous of that. Furthermore, we ask you to take the tools and the products that we have collectively developed and sit down with your bishops, your pastors, and the different organizations that you have affiliations with and encourage them to use these materials to promulgate what we have done. We have started to develop a very powerful network. Many of you represent organizations that have tremendous influence throughout the Church. If you feel confident in the quality of our people, and you feel what we’re doing is worthwhile, then we will achieve our goals.

To the extent that you have a relationship with the bishop, ask that bishop to join us. We’ve had a number of conversations with the bishops over the years. They encourage us not to view the numbers that come to this meeting as an indication of the impact we are having. I do believe that because they say it to us, and we have heard a lot of anecdotal information about that—but it would be helpful and it’s reinforcing to have more bishops here. One of the things I want to talk about is whether or not to move this gathering around the country or not. We’re very thankful to Wharton over the last five years for hosting us. It’s been phenomenal, but maybe now, to demonstrate to our broader Catholic community some of the goals that we have, maybe it’s time to move around the country. If you could communicate with your bishops—and also the superiors and provincials of both men’s and women’s religious orders—and serve as an advocate of what the Leadership Roundtable offers, that would be a significant help.

“This is what we are about . . . . We may never see the end results, but that is the difference between the master builder and the worker. We are the workers, not the master builder, not messiah, we are prophets of the future, that is not our own.”

Your willingness to serve or chair some these subcommittees: that’s really where the heart of the work we are doing lies. Hopefully you do feel the sense of quality that we’ve got, and those of you who have done that have recognized that we have come up with some really good things and it’s a worthwhile expenditure of your time.

I’ll just close with a comment. Sometimes my intensity takes over. I am an impatient guy by nature and the scalability thing is an important thing. I do realize that we’ve made a lot of progress and I recognize that and I’m personally proud and inspired by it. Our good friend Gerry Roche calls me up periodically and every time I talk to him he gives me a good piece of advice and he gives me something that touches me. This morning on the way over, he told me he called back to his office and he got a copy of a quote by a real martyr of the Church, Archbishop Oscar Romero. He wrote this, and I think it is relevant to all of us:
“This is what we are about. We plant the seeds that one day will grow. We water seeds already planted knowing that they hold future promise. We lay foundations that will need further development. We provide yeast that produces effects far beyond our capabilities. We cannot do everything and there is a sense of liberation in realizing that. This enables us to do something, and to do it very well. It may be incomplete, but it is a beginning, a step along the way, an opportunity for the Lord’s grace to enter, and to do the rest. We may never see the end results, but that is the difference between the master builder and the worker. We are the workers, not the master builder, not messiah, we are prophets of the future, that is not our own.”

Plenary Discussion Highlights

Kathleen McChesney:
Could you say something about what the Board is thinking about as the possible topic if we do have another general meeting next year? I understand there is a possibility of taking on the theme of communication and the use of the media both to lend professional expertise on the question of how the Church could improve its communication within the Church but also using the print media, televised media, the Internet to improve and work on the Church’s image in the larger country and the community.

Geoff Boisi:
We are going to have annual meetings. That isn’t a question, it’s just a question of whether or not to have it here and what the timing of it is and whether or not to do it in a way that includes certain other messages… I think we’ve gotten people involved around the notion that we are interested in temporal themes and things like that, and this is emphasized with Wharton being a leading business school. I don’t think we’ve really decided whether we will meet here again, but I think that is a legitimate and important topic to consider.

Fr. Monan:
Just one idea on your reflection of patience and the importance of patience. The fact that I think all of us realize what a tremendous resource we have here, and among the other people who are not here who could be of great help, and the surprise we’ve had that there has been less activity on the part of bishops that we would have liked, and you know we’ve talked to a number of bishops individually, Cardinal George, and certain others. And they explained to us that part of the problem is the reluctance to and the fear of giving up control. I think that’s true. The more I’m involved with this group, the more I recognize the magnitude of the change that would be if the Church really began to professionalize the management of its operations. When the universities did this 10, 15, 20 years ago, the change was dramatic. It’s almost a different world. If the Church were to professionalize its management at the diocesan level, at the parish level, the change would be a complete change and the Church hasn’t seen anything quite like it. So, to take on a task like that is
certainly a long-range effort that is going to take years and years to do. But I think the ball is going to pick up speed and start moving, and the change will be dramatic. It does take patience on the part of all of us to realize what a big operation this is we are inviting the Church to begin to take on.

*Thomas Healey:*

I meant to mention in my comments before that one of the important things that we heard and we concluded as a group, among the many things which you will read in the document that we produce after this, is this notion of training for pastors and the important role that the universities can play in that. I just saw Dr. Cernera and Jack DeGioia, who invited us to work on some specific projects. I think we ought to take it upon ourselves to work with them. Whether that turns to be a focal point in the notion of training or some combination of training and communications or another topic of this whole notion of the multicultural aspects of the Church, there is a whole element in terms of the involvement of the reconnection with the youth—these are all topics that we have to grapple with over time and they should be candidates for discussion and focus of this group. But they all weave into the thing that Fr. Monan just talked about. I think you’ll see from the information that we distribute over the course of the next weeks that we are considering not only the things that we’ve started to work on but also the contribution that the Church makes to the country economically. If we could professionalize this contribution from a managerial standpoint even more, it would free up huge resources that could be applied to other uses.
APPENDIX E

PARTICIPANTS

Bishops

Most Rev. J. Kevin Boland is the Bishop of the Diocese of Savannah, GA.

Most Rev. Tod D. Brown is the Bishop of the Diocese of Orange, CA.

Most Rev. William B. Friend is the Bishop Emeritus of the Diocese of Shreveport, LA.

Most Rev. Howard J. Hubbard is the Bishop of the Diocese of Albany, NY.

Most Rev. Alfred C. Hughes is the Archbishop of the Archdiocese of New Orleans, LA.

Most Rev. Basil H. Lotsen is the Eparch Emeritus of the Ukrainian Eparchy of Stamford, CT.

Most Rev. Michael A. Saltarelli is the Bishop of the Diocese of Wilmington, DE.

Most Rev. Guy Sansaricq is the Auxiliary Bishop of the Diocese of Brooklyn, NY.

Most Rev. J. Terry Steib is the Bishop of the Diocese of Memphis, TN.

Most Rev. Joseph M. Sullivan is a retired Auxiliary Bishop of the Diocese of Brooklyn, NY.
Priests, Religious, and Laity

**Mr. James Alphen** is the executive director of the National Organization for Continuing Education of Roman Catholic Clergy (NOCERCC).

**Ms. Leisa Anslinger** is the pastoral associate of evangelization, catechesis and stewardship at the Immaculate Heart of Mary Parish in Cincinnati, OH.

**Dr. Harold Attridge** is the dean of the Yale Divinity School.

**Msgr. John O. Barres** is the chancellor of the Diocese of Wilmington, DE.

**Rev. Robert L. Beloin** is the chaplain of Saint Thomas More Chapel & Center at Yale University.

**Sr. Mary Bendyna, RSM, Ph.D.** is the executive director of the Center for Applied Research in the Apostolate (CARA) and a member of the Buffalo Regional Community of the Sisters of Mercy of the Americas.

**Ms. Betsy Bliss** is a managing director for JP Morgan/Bear Stearns and a member of the board of the National Leadership Roundtable on Church Management.

**Mr. Geoffrey T. Boisi** is the chairman and chief executive officer of Roundtable Investment Partners, LLC, and the chairman of the National Leadership Roundtable on Church Management.

**Mr. Lawrence Bossidy** is the former chairman and CEO of AlliedSignal and Honeywell.

**Mr. Michael Brough** is the director of planning and member services for the National Leadership Roundtable on Church Management.

**Dr. Francis J. Butler** is the president of Foundations and Donors Interested in Catholic Activities (FADICA) and secretary of the board of the National Leadership Roundtable on Church Management.

**Mr. Paul Butler** is the managing director of GlobalEdg.
Rev. William Byron, SJ, is the president of St. Joseph’s Preparatory School in Philadelphia, PA.

Mr. John Caron is the president of Caron International.

Dr. Anthony Cernera is the president of Sacred Heart University.

Mr. Dennis Cheesebrow is the president of TeamWorks International.

Mr. Michael Costello is the director of operations for the National Leadership Roundtable on Church Management.

Ms. Barbara Anne Cusack is the chancellor for the Archdiocese of Milwaukee, WI.

Rev. Daniel Danielson is a retired pastor in the Diocese of Oakland in Piedmont, CA.

Dr. John J. DeGioia is the president of Georgetown University.

Ms. Elizabeth Donnelly is a member of the Mary J. Donnelly Foundation and FADICA.

Rev. Joseph Donnelly is the pastor of Sacred Heart Parish in Southbury, CT.

Sr. Georgeanne Donovan, SMSM, is the chancellor for the Diocese of San Bernardino, CA.

Dr. Marilou Eldred is the president of the Catholic Community Foundation of the Archdiocese of St. Paul and Minneapolis, MN.

Mr. John Eriksen is the director of research and client services for the National Leadership Roundtable on Church Management.

Dr. Geno Fernandez is a principal at McKinsey & Company and a member of the board of the National Leadership Roundtable on Church Management.

Mr. Joseph F. Finn is a member of the Order of Malta.

Ms. Carol Fowler is the director of personnel services for the Archdiocese of Chicago and is a member of the board of the National Leadership Roundtable on Church Management.

Mr. Daniel Gast is the director of INSPIRE, Loyola University Chicago.
Mr. Frederick W. Gluck is the former managing director of McKinsey & Company, Inc., and a member of the board of the National Leadership Roundtable on Church Management.

Mr. Rolando Guerra is the chief operating officer of the Mexican American Cultural Center.

Ms. Sue Harte is the director of development for the Penn Newman Center at the University of Pennsylvania.

Rev. John Haughey, SJ, is a senior research fellow at the Woodstock Theological Center.

Mr. Thomas J. Healey is a retired partner of Goldman, Sachs & Co. and a senior fellow at Harvard University’s Kennedy School of Government. He is treasurer of the board of the National Leadership Roundtable on Church Management.

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

Ms. Sarah Heiman is an intern with the National Leadership Roundtable on Church Management.

Rev. Dennis Holtschneider is the president of DePaul University.

Dr. Mary Ellen Hrutka is the executive director of the Mid-Atlantic Catholic Schools Consortium.

Rev. John Hurley, CSP, is the executive director for the National Pastoral Life Center.

Mr. Jon Jakoblich is an intern with the National Leadership Roundtable on Church Management.

Ms. Marti Jewell is the project director for the Emerging Models Project of the National Association for Lay Ministry.

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

Sr. Carol Keehan is the president and CEO of the Catholic Health Association and a member of the board of the National Leadership Roundtable on Church Management.

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

Ms. Susan King is the vice president of public affairs for the Carnegie Corporation of New York and is a member of the board of the National Leadership Roundtable on Church Management.

Mr. William D. Kirst is the chief financial officer for the Archdiocese for the Military Services.

Mr. James Lundholm-Eades is the director of parish services and planning for the Archdiocese of St. Paul and Minneapolis, MN.

Mr. Patrick Madden is the executive director of development for the Archdiocese of Baltimore, MD.

Msgr. James Mahoney is the vicar general and moderator of the curia for the Diocese of Paterson, NJ.

Dr. Kathleen Mahoney is the president of Porticus North American Foundation and a member of FADICA.
REV. EDWARD A. MALLOY, CSC, is the president emeritus of the University of Notre Dame and a member of the board of the National Leadership Roundtable on Church Management.

MR. ALBERT McCARTHY is a member of the Loyola Foundation and FADICA.

DR. KATHLEEN McChesney is the CEO of Kinsale Management Consulting and a member of the board of directors of the National Leadership Roundtable on Church Management.

DR. MARY C. McDonald is the secretary of education and superintendent of schools in the Diocese of Memphis, TN.

DR. MARGARET McCARTY is the president of Education for Parish Service Foundation.

MR. PETER MCDONOUGH is professor emeritus at Arizona State University.

MR. JAMES MCDONOUGH is the chancellor for the Archdiocese of Boston, MA.

MR. BILL McGARVEY is the editor-in-chief of BustedHalo.com.

MR. OWEN McGovern is the president of Catholic Solutions.

MR. PATRICK McGrory is the chair of the Raskob Foundation for Catholic Activities, Inc.

DR. ROBERT J. Miller is the director of research and planning for the Archdiocese of Philadelphia, PA.

SR. PAT MITCHELL, SFCC, is the director of the Office for Parish & Planning for the Diocese of San Jose, CA.

MR. MARK MOGILKA is the director of stewardship and pastoral services for the Diocese of Green Bay, WI.

REV. J. DONALD MONAN, SJ, is the chancellor of Boston College, having served 24 years as its president, and is a member of the board of the National Leadership Roundtable on Church Management.

DR. MARY JO Moran is the executive director of NACPA.

MR. JONATHAN O’HERRON is with Lazard Freres & Co., LLC.

MR. FREDERICK PERELLA is executive vice president of the Raskob Foundation for Catholic Activities.
**MSGR. EARL V. PROVENZA** is the former diocesan administrator for the Diocese of Shreveport, LA.

**REV. DAVID RICHTER** is vicar general for the Diocese of Shreveport, LA.

**SR. TERRY RICKARD** is the executive director of RENEW International.

**MS. KERRY A. ROBINSON** is the executive director of the National Leadership Roundtable on Church Management.

**MR. GERARD R. ROCHE** is the senior chairman of Heidrick & Struggles.

**MS. LORRAINE RUSSO** is the executive assistant of Roundtable Investment Partners, LLC.

**MR. MICHAEL SCHAEFER** is the executive director of the Catholic Finance Corporation.

**SR. KATARINA SCHUTH, OSF,** is the Endowed Chair for the Social Scientific Study of Religion at St. Paul Seminary School of Divinity at the University of St. Thomas.

**MR. JOSEPH SPADARO** is the executive director of management services for the Archdiocese of Baltimore, MD.

**MR. ANTHONY SPENCE** is the editor-in-chief of Catholic News Service.

**MR. DAVID SPOTANSKI** is the chancellor for administration and pastoral services of the Diocese of Bellville, IL.

**MS. LYNN TIDGHELL** is a parishioner of Sacred Heart Church in Southbury, CT.

**REV. RICHARD VEGA** is the president of the National Federation of Priests’ Councils.

**REV. JOHN J. WALL** is the president of the Catholic Church Extension Society and a member of the board of the National Leadership Roundtable on Church Management.

**DR. CHARLES E. ZECH** is the director of the Center for the Study of Church Management at Villanova University.

**REV. CHARLES ZLOCK** is the chaplain and director of the Penn Newman Center.
CONFERENCE AGENDA

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

National Leadership Roundtable on Church Management
2008 Annual Membership Conference

Description

How do Catholic leaders demonstrate the pastoral, moral, managerial and financial leadership our Church requires and deserves? What can we learn from successful leaders within and beyond the Church that will help us to meet our contemporary challenges, particularly with respect to managing the modern parish?

Well-managed, responsibly governed, ethical Church institutions and organizations more effectively achieve the mission of Christ. We are aiming high when we call for and promote standards for excellence, but the Church deserves nothing less. By committing ourselves to best practices and detailed performance benchmarks, we strengthen our operations and ensure accountability.

Our annual meeting this year will feature outstanding leaders who are committed to excellence and are confident that ever greater levels of managerial effectiveness can be achieved at the parish level. Our deliberations will lead to specific strategies and practical recommendations for strengthening the leadership capacity and effectiveness of Catholic Church leaders—lay and ordained.

WEDNESDAY, JUNE 25, 2008

6:00-8:00pm Welcome Reception
Huntsman Hall, The Wharton School
THURSDAY, JUNE 26, 2008

7:30am ......................... Continental Breakfast
Huntsman Hall
3730 Walnut Street

8:00am ......................... Registration

8:30am ......................... Opening Prayer
Most Rev. Bishop William B. Friend, Bishop Emeritus of the Diocese of
Shreveport, LA
Welcome and Introduction
Ms. Kerry A. Robinson, Executive Director

8:45am ......................... Leadership and Management: Distinction and Relevance
Mr. Fred Gluck, Former Managing Director, McKinsey & Co.

9:00am ......................... Overview of Activity and Accomplishments
Mr. Thomas J. Healey, President, Healey Development
Rev. J. Bryan Hehir, Secretary for Social Services, Archdiocese of Boston
Dr. Kathleen McChesney, CEO, Kinsale Management Consulting

9:30am ......................... Plenary Session: Strategic Input

10:00am ..................... Break

10:15am ..................... Best Practices from Model Parishes
Rev. John J. Wall, Catholic Church Extension Society
Ms. Leisa Anslinger, Pastoral Associate, Immaculate Heart of Mary Parish,
Cincinnati, OH
Rev. Joseph Donnelly, Pastor, Sacred Heart, Southbury, CT

11:15am ..................... Plenary Session: Q & A

12:00 ....................... Lunch

Leading a Catholic University in the 21st Century
Dr. John J. DeGioia, President, Georgetown University

Introduction of Parish Ministry Assessment Tool
Mr. Jim Lundholm-Eades, Archdiocese of St. Paul-Minneapolis
2:00pm ......................... Small Group Discussion: Best Practices and Parish Assessment

3:15pm ......................... Challenges and Solutions in Church Strategic Planning
                          Most Rev. Alfred C. Hughes, Archbishop of New Orleans
                          Sr. Katarina Schuth, OSF, University of St Thomas

3:45pm ......................... Plenary Session Q & A

4:30pm ......................... Adjourn

5:00pm ......................... Celebration of the Eucharist
                          Inn at Penn

6:00pm ......................... Cocktails
                          Inn at Penn

7:00pm ......................... Awards Banquet
                          Honoring the Diocese of Memphis Catholic School System Award accepted by
                          Most Rev. Terry Steib, SVD, and Dr. Mary C. McDonald

FRIDAY, JUNE 27, 2008

8:00am ......................... Continental Breakfast

8:30am ......................... Opening Prayer

Making It Happen
Mr. Lawrence A. Bossidy, Author, Former Chairman and CEO, AlliedSignal and
Honeywell

9:15am ......................... Plenary Session: Q & A

9:45am ......................... Break

10:15am ......................... Small Group Discussions: Renewing and Strengthening of Trust Project

12:00 ......................... Lunch

Summary and Next Steps
Mr. Geoffrey T. Boisi, Chair
Ms. Kerry A. Robinson, Executive Director

1:30pm ......................... Adjourn
LEADERSHIP ROUNDTABLE
PUBLICATIONS AND RESOURCES

These proceedings are part of a series of publications on the Church in America

Challenges and Opportunities in Governance and Accountability for Institutions in Transition
National Leadership Roundtable on Church Management, 2004

Managerial Excellence: Engaging the Faith Community in Leadership in the Church Today
National Leadership Roundtable on Church Management, 2008

A Call to Excellence in the Church
National Leadership Roundtable on Church Management, 2005

These publications are available for free as a download from our website at www.nlrcm.org or can be ordered online in printed format.

To view video clips of presentations on major issues of management, finance, and human resources in the Church, visit www.nlrcm.org and click on “Conference Videos.”

Bringing Our Gifts to the Table: Creating Conditions for Financial Health in the Church
National Leadership Roundtable on Church Management, 2006

The Leadership Roundtable has also produced DVDs and Planning Resources for Dioceses and Parishes. For further information, visit www.nlrcm.org.

Give us Your Best: A Look at Church Service For a New Generation
National Leadership Roundtable on Church Management, 2007

For further information on the work of the Leadership Roundtable please visit www.nlrcm.org and use the “Join Our Email List” button to receive our electronic newsletter.
STANDARDS FOR EXCELLENCE
An Ethics and Accountability Code for Catholic Dioceses, Parishes, and Nonprofits

The Standards for Excellence describes how Catholic dioceses, parishes, and nonprofits should act to be ethical and accountable in their program operations, governance, human resources, financial management, and fundraising. Eight Guiding Principles are provided, along with fifty-five standards—more detailed performance benchmarks that will enable Catholic organizations to strengthen their operations.

In full conformance with canon law, the Standards responds to the call to good stewardship and accountability in the U.S. bishops’ pastoral letter, Stewardship: A Disciple’s Response.

Dioceses, parishes, and Catholic nonprofits are encouraged to pledge to commit to the Guiding Principles of the Standards for Excellence. The Leadership Roundtable provides free education resource packets to all Partners in Excellence to assist them in the implementation of the Standards.

For further information on the Standards for Excellence and on best practices in Church management, finances, and human resources, please visit our website at www.nlrcm.org/standards or email info@nlrcm.org or call 202-223-8962.
To order additional copies of *Managerial Excellence: Engaging the Faith Community in Leadership in the Church Today* or any other Leadership Roundtable publications, please send your request to:

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Suite 825  
Washington, D.C. 20036

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