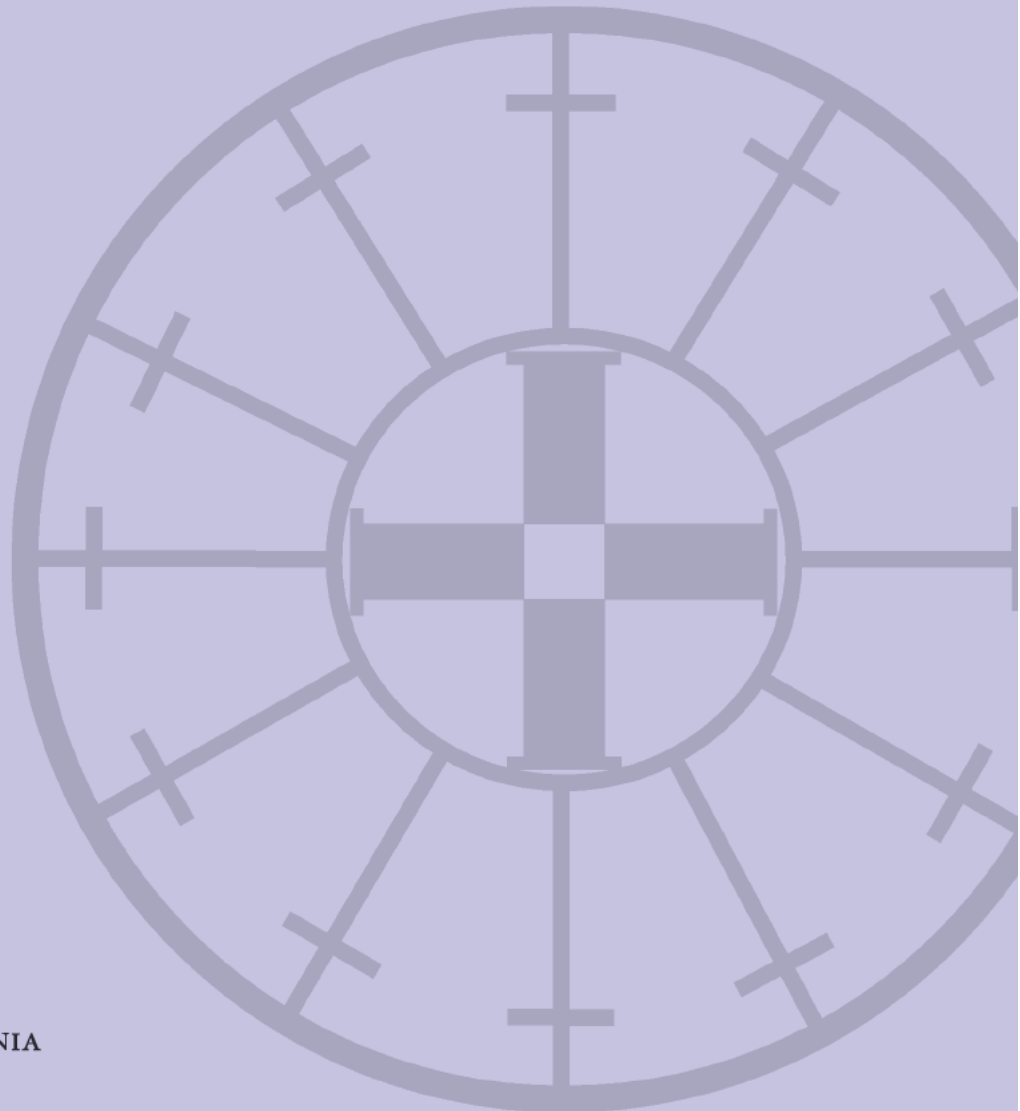


A BLUEPRINT FOR RESPONSIBILITY:

RESPONDING TO CRISES WITH COLLABORATIVE SOLUTIONS

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

JUNE 23–25, 2010
PHILADELPHIA, PENNSYLVANIA



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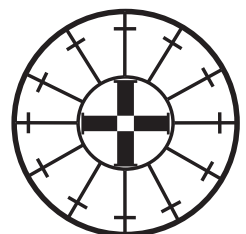


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REPORT FROM THE EXECUTIVE DIRECTOR

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

It is my privilege to welcome you to the 2010 Annual Meeting of the National Leadership Roundtable on Church Management. Remarkably, this is our seventh national gathering at the Wharton School of Business, and next month will mark our fifth anniversary as a formally incorporated national organization serving the Catholic Church. In 5 years, our extraordinary board of directors has met no fewer than 20 times to set strategic direction, guide and monitor our work program and measure the impact and effectiveness of our service to the church.



Kerry Robinson

There are two primary purposes we hold this annual gathering. The first is to provide an account of the activity and accomplishments of the Leadership Roundtable since our gathering one year ago. This is partly a matter of emulating what we advocate—to offer in a disciplined, rhythmic manner a transparent account of our own progress and elicit your strategic feedback.

We are looking to you, religious, ordained and lay leaders, for guidance on how we can take the Leadership Roundtable to the next level. What can we do to ensure that we are even more effective and making a valuable and relevant contribution to the church? We welcome your candor, wisdom and insight.

Our second purpose for convening is to examine specific themes related to the temporal affairs of the church. We have systematically highlighted our core areas of focus over the 5 years we have been in existence: church finances, human resource development, management and communications.

We were on track this year to take up financial management again, and this was timely given the ongoing impact of the global economic crisis and the Leadership Roundtable's concerted effort to strengthen and safeguard church assets during an uncertain economic period. Preparations for this meeting took place over the whole course of the preceding year. However, given the reemergence in Europe and elsewhere of the sexual abuse crisis, we felt strongly that this, too, should be part of today's agenda. In addition to being relevant and effective, a salient characteristic of the Leadership Roundtable is to be positive and laudatory. And with respect to the sexual abuse crisis, we wanted to highlight in particular what has worked well in the church's response in the US over the past 8 years.

These are relentlessly challenging days for the church and to pretend otherwise would be naïve. With the twin crises, the economic strain of fiscal uncertainty and sexual abuse in the church highlighted on a global scale, it is not always easy to be Catholic, let alone to commit to lives of leadership and service to the church. We are often asked, "Where do you find the strength, resolve and stamina to attend each day to such challenges on behalf of the church?"

It is vital for thoughtful, articulate, educated Catholics with a diversity of expertise and competencies to involve themselves actively in the life of the church.

The best answer and advice we can offer in times of anguish is to always remember what one loves most about the church. We have come to marvel that there are as many personally held and valued reasons why one loves the church as there are members of the church, so to be clear about what we most love and value will sustain us in times of challenge and difficulty. Daily, my colleagues and I witness the generosity and competency of senior executive leaders from all walks of life who want to share what they do best to help the church they love meet the complex contemporary challenges it faces.

The urgency for this level of skill and expertise in managerial matters is deeply evident. The members of the Leadership Roundtable believe that to do nothing to help is to be complicit in what is wrong. It is not work for the faint of heart and requires a discipline, courage, vision, humility and tenacious hard work. But we're ready.

Your leadership could not come at a more profound moment in the life of the church. It is vital for thoughtful, articulate, educated Catholics with a diversity of expertise and competencies to involve themselves actively in the life of the church. The important milestone of our fifth anniversary affords us a chance to reflect on all that has been accomplished through this remarkable and unique initiative. We are eager for your reaction to what has worked well, what might be changed

or strengthened and how best to position the Leadership Roundtable to continue to be of effective service to the church.

There are a few questions that I would ask you to ponder. How can we strengthen the engagement of members and recruit new members on a national level? How can we maximize the communications effort to make sure that all Catholics are aware of this hopeful initiative? What measures can be put into place to allow us to continue to offer high quality services and also allow for proper resources of time, energy, personnel and finances for creative new programs? How can we strengthen the financial plan for the Leadership Roundtable toward a greater donor base, toward alternative sources of income and, ultimately, towards self-sufficiency?

At what point and how should we respond to the increasing demand to provide the Leadership Roundtable's resources to the global church? How do we take this proven success, no longer an experiment, to the next level and affect a tipping point? Your guidance on these and other questions will be of enormous help to us.

On the eve of our anniversary, permit me to express our collective, and my own deeply personal gratitude, to you, Geoff, as our founding chairman, for your vision, leadership, tenacity, commitment and extraordinary dedication to the Leadership Roundtable, and for assembling the most dedicated, articulate, generous, supportive board of directors I have ever had the privilege to know. The church, and by extension the world, is blessed by you.

Happy anniversary to the Leadership Roundtable.

ACTIVITIES AND ACCOMPLISHMENTS

Achievements of the Leadership Roundtable

Ms. Kerry A. Robinson

*Executive Director, National
Leadership Roundtable on
Church Management*

Mr. Thomas Healey

Healey Development, LLC

Dr. Carol Fowler

*Director of Personnel Services,
Archdiocese of Chicago*

Dr. Charles Geschke,

*Co-Founder and Co-Chairman,
Adobe Systems, Inc.*

Rev. John J. Wall

President, Catholic Extension



Kerry Robinson, Tom Healey, Chuck Geschke, Fr. Jack Wall

Thomas Healey

It's my pleasure to describe two Leadership Roundtable projects:

STANDARDS FOR EXCELLENCE

First, I'm proud to announce the publication of a case study of the implementation of the Standards for Excellence in the Diocese of Gary, which represents the bedrock of what the Leadership Roundtable is trying to do.

The Standards for Excellence is a package of 55 best practices for a variety of Catholic organizations. The original version was developed by a group in Maryland for not-for-profit organizations. With the assistance of distinguished canon lawyers, the Leadership Roundtable adapted it for the Catholic Church. One of the things we've learned at the Leadership Roundtable is how to take things that work in the business sector and adjust them to make them a perfect fit for the church.

They've been fine tuned in two different ways. There are different versions for dioceses, parishes and Catholic nonprofit organizations, owing to their different objectives and different manners of execution. They've also been translated into Spanish, through which we hope to get even broader usage. Over 10,000 copies of the codes have been distributed to date. There are over 300 Partners in Excellence, who have committed to the implementation of the Standards in their organizations, representing 24 dioceses and 15 Catholic nonprofits.

The Standards are very practical. In my diocese of Paterson we're very proud of our new Diocesan Center for Evangelization. The Center's director, Fr. Geno Sylva, called me one afternoon and said, "Now we've got to start to figure out how to develop the board of directors and the bylaws. Do you have any suggestions, Tom?" I said, "Yes, I will send you your bylaws. Would you like them in English or Spanish?"

Much of what's there is just good common sense, especially on the financial side, but they are also very sophisticated. There's a whole program for executing them effectively, with a substantial amount of background material that will allow any organization to implement them.

The Standards were developed by a group of Leadership Roundtable members who are diocesan leaders, subject matter leaders and advertising executives. I'd like to thank Dr. Kathleen McChesney in particular for helping to orchestrate the initiative. The program has a full-time project manager, Peter Denio. There is also a website, www.CatholicStandardsforExcellence.org, which makes the education resources available in a convenient fashion and hosts a discussion forum for Partners in Excellence. A communications effort for the Standards is currently being launched, including advertising in 10 Catholic publications. In the last four months alone the Standards have been adopted in archdioceses as far apart as Boston and Anchorage, in the Eparchy of Passaic and in the Diocese of Knoxville.

We believe in best practices and one of the best practices when doing a project like this to do a proper assessment once it's been started. As part of a study funded by the Carnegie Corporation of New York, the University of Notre Dame assessed the implementation of the Standards in the Diocese of Gary. Not only does the study help provide some mid-course correction, but also demonstrates statistically significant improvement in the diocese in all of the eight areas covered by the Standards.

Our goal remains to get this into every diocese, parish and Catholic organization in the country.

CATHOLIC LEADERSHIP 360

The second project is younger and I would like to provide a report on its piloting. Catholic Leadership 360, created by the Leadership Roundtable, adapts the practices many businesses successfully employ of providing professional, organized, performance-based feedback to participants in a thoughtful way, designed not to be critical but to be part of the ongoing formation and development of leaders. In its adaptation to the church, these leaders are bishops, pastors and laymen.

The two aspects that seem to have been most appreciated have been the opportunity for ongoing development and a one-on-one feedback session that's part of the process.

Being a pastor, especially today, can be a very lonely occupation. The more help and support we can give them, the better the church is going to be. We've partnered on this project with the Center for Creative Leadership, the National Association of Church Personnel Administrators and the National Federation of Priests' Councils. The support of those three organizations is what has made this a success. If it sounds like the Leadership Roundtable believes in partnering, we do. Our projects are ambitious and the opportunity to partner has been a terrific help.

Catholic Leadership 360 been piloted in the Dioceses of Pittsburgh and Metuchen. The project will be expanded in Chicago and California later this year. The first program evaluation found that 96 percent of the participants would recommend the process to others. The only other thing I can think of that would hit a 96 percent success ratio would be to serve somebody ice cream.

Fr. Richard Vega, president of the National Federation of Priests' Councils and a member of the Leadership Roundtable, and Cathy Rongione of GlobalEdg, LLC, have both worked very hard on the adaptation and implementation of the project.

To conclude, what's common about these two things? They are both scalable. They can be taken to every diocese and every parish. We have a professionalized process of developing them, including assessment and mid-course improvement. Where we do need help is in their promotion because they should be in every diocese and parish. How do we get them there? We would love your guidance and advice.

Charles Geschke

I would like to focus on two activities that have occurred over the past year, and in fact have been going on for some time at the Leadership Roundtable. One is in the area consultancy, providing direct assistance and using the resources not just of the Leadership Roundtable but, more importantly, the network of contacts that people involved in this activity can bring to bear. The second is in the area of communications and media. We're trying to expand the visibility of the work of the Leadership Roundtable throughout the Catholic community.

CONSULTANCY

The Leadership Roundtable's consultancy team has already successfully completed 18 projects that have provided direct assistance to dioceses, schools and religious communities and other Catholic organizations around the country. So as you can see, it's already a very active area.

Through the Leadership Roundtable's membership network, we provide access to quality practitioners who can work with the parish and diocese and offer expertise in handling complex problem solving and planning and execution in the areas of management, human resources and finance.

The Leadership Roundtable's consultancy aims to provide a sub-structure that the church can use in terms of learning how to do more effective operations in those areas.

We have a growing pipeline of opportunities and we have coordinated with various foundations in bringing to the table both high-quality consultancy organizations and a pool of consultants that are acclimated both to the perspective of the Leadership Roundtable and to the contemporary needs of the Catholic Church.

This year we worked with our first religious community on a six-month engagement focused on governance and matters of finance. We're also beginning work with another large religious order for a major financial audit. These are important first steps in helping the infrastructure of the church get up to speed in terms of making sure that its affairs are in order so we can avoid the kind of public embarrassment that the church has dealt with over the last several years.

Our consulting committee and director of consulting, Michael Costigan, would welcome any leads that you have that could help in providing more of these services.

We've also launched two national initiatives in response to requests for assistance from meetings with the United States Conference of Catholic Bishops as well as individual dioceses. The first is an effort to provide consultancy on strategic investment and portfolio management. In November 2009 the bishops of the United States were presented with a plan to protect diocesan financial resources and ensure that economic solvency would be maintained during this current climate of economic volatility.

Through the Leadership Roundtable's membership network, dioceses are able to get access to top asset managers for the most effective administration of their resources. This is important assistance because so often the church has not been sufficiently aggressive. Nor has it exploited the size and the volume of the finances and the amount of investment capital that can be managed.

By leveraging cooperation horizontally across the dioceses of the country, we can get much better access to the top money managers. At the same time, the bishops are provided the discretion and independence necessary for effective stewardship of their finances are given clear guidance in how to ensure that those finances are maintained in an ethical and appropriate manner.

The second initiative, where the size and volume of the church's needs are also leveraged, addresses the area of coordinated procurement. The Leadership Roundtable has presented bishops with a plan to coordinate their purchasing as a way of reducing costs on a planned, thoughtful and very efficient basis.

With a unique relationship with partners that have already implemented coordinated procurement in large businesses and organizations in the United States, to say nothing of the US government, the Leadership Roundtable is able to make a significant money-saving option available to both dioceses and Catholic organizations on a nationwide basis.

COMMUNICATIONS

The second area I'd like to address concerns communications. I think all of us who have been involved with the Leadership Roundtable continue to be concerned with getting the visibility that we would like for the organization. We've made great progress over the last 5 years, but there's still a lot more to do. As I engage people in the communities out in California, for example, the awareness of the Leadership Roundtable is pretty minimal. I think that we continue to have to invest our resources in the area of communications.

This past year has been particularly active in communications. Through the leadership of Geoff and Kerry and the entire staff, we've made a lot of positive relationships now with those in media so that the media actually comes to us and ask for opinion and feedback, help in writing articles, to make contributions to books, to make appearances, both on a television as well as on the Web, to provide quotes and commentary that help other media do a better job of describing the activities in the Church.

This itself increases the visibility of the Leadership Roundtable. In the past year we've been very active with CNN, USA Today, The Washington Post, and Newsweek, representing a whole catalog of all the major media in this country. The more we can do that, the more we can get that kind of visibility, the more people will become aware of the Leadership Roundtable and, hopefully, will begin to invest their own talents in contributing to our projects.

The Leadership Roundtable was asked by CatholicTV, a nationally syndicated network, to produce a three-part series on the activities of the Leadership Roundtable. The premiere was in May 2010 and is available online at CatholicTV.com. I encourage all of you to take a little bit of time to take a look at that program because you'll find it very interesting.

The new Leadership Roundtable website, www.TheLeadershipRoundtable.org, and the accompanying website for the Catholic Standards for Excellence, www.CatholicStandardsforExcellence.org, were launched in April 2010. Like any media, websites need to be constantly refreshed in order to get people to come back to them, and that's part of the investment that the Leadership Roundtable is making in order to disseminate information about its activities.

The Leadership Roundtable has also been very active in the area of social networking. People between the ages of 18 and 40 are very engaged in that form of media, and to reach that community, which is critical for the vitality of the Church, you have to be a participant. You'll be pleased to know that the Leadership Roundtable is.

The Church in America DVDs provide a very simple way to get information out to the parishes and dioceses about various things in which the Leadership Roundtable is engaged. Over 1,900 of those DVDs have already been distributed. The Archdiocese of Atlanta purchased 100 copies of the DVD, for all of their parishes to assist in the formation of their financial councils. The Diocese of Knoxville has used the DVDs for the formation of their parish councils. Through that kind of activity, hopefully we can get the word spread throughout the dioceses of North America about the quality and the importance of using that kind of material.

Finally, the Leadership Roundtable, its members and staff, have provided keynotes and seminars at national meetings, diocesan convocations, academic meetings and a variety of gatherings across the United States. This is very vital activity, something I'm very pleased to see as a member of the board, and I think you should all be pleased as partners in the work of the Roundtable, too.

Rev. John J. Wall

The guiding purpose behind the Leadership Roundtable is leadership and how to strengthen the leadership of the Catholic community and Catholic Church. When we think about this church, it is striking that although there is such a rich expression in terms of its history and spirituality, institutionally and structurally it's all extremely simple for a global Church. There is the papacy in regards to the universal dimension, the diocese, which represents a significant area of the institution, and then you have a parish.

So while it's got this richness of expressions, the institutional expressions are so very simple and there are very few layers in the middle. The role of a pastor is critical in terms of strengthening the experience of leadership. I'd like to focus on a couple of things on the role of a pastor and then address about how we strengthen the leadership of pastor and also develop future leadership in our church.

CATHOLICPASTOR.ORG

We have created a virtual community of practice forum for Catholic pastors, CatholicPastor.org, to take advantage of the whole new world of communication and social media. CatholicPastor.org has been successfully launched and is providing an increasingly valuable learning resource.

It's a collaborative virtual learning forum. As part of an ongoing community of formation and as a community practice, pastors can engage in and stimulate conversation with each other, learn from one another and share best practices. We often talk about what the business community can bring to experiences in the church in terms of leadership and organization and best practices. This actually originally came from the military. General James Dubik, who serves on the Leadership Roundtable board of directors, brought this experience from Iraq. He suggested that when we get into the experience of a new place, like the military is presently in Iraq and Afghanistan, the rules change. The role of the field commander there took on an added importance, and they found that the manuals of leadership were no longer sufficient. They discovered that there was a learning thing that was going on right in the field.

That's also very true of our pastoral leadership. I still remember a conversation from many years ago with one of the great theologians from the Second Vatican Council, Edward Schillebeeckx, who recently died. I remember being in a conversation with him as a young priest and asking, "What's the future of the church going to be?" And he said, "I'm an academic theologian. The future is going to be driven by the pastoral theologian, the people in the field creating new expressions of the experience of the church."

The role of the leader on the ground is so important. And that's why priests and the community that is being formed within pastoral and parish life are so very, very critical. Priests are a community of practice and it's important to help them through the technology of online tools with resources and capacities they can find useful in their ministry.

We invite you to visit www.CatholicPastor.org for more information.

THE PASTOR'S TOOLBOX

I'd now like to speak about the Pastor's Toolbox. The truth is that pastors today are being put in that position a lot sooner and with a lot less experience than what was once true, when in order to experience the church, a priest was in a parish many times and learned on the job through mentoring relationships with other pastors and with other associate pastors, and was gradually grew into the role of pastor.

Today, a priest is ordained and is assigned as a pastor immediately or within a very short period of time, and without a lot of on the job learning experience. The Pastor's Toolbox was created to help a new pastor discover some of the skills that he can use and working knowledge that goes along with it.

And that's what the new Pastor's Toolbox is about. So we are on course. The accompanying reference book is great for pastors to provide resources in the areas management, finance and human resources. The program has been developed in partnership—and again, collaborative efforts are really at the heart of so much we're doing here—with Seton Hall University and the International Institute for Clergy Formation. This is to design, help and train new pastors for some of the complex jobs they will face as they move into the twenty-first century parish and all of its relationships.

The first meeting of pastors was held last July and the second meeting is scheduled for this July. Pastors will again participate in an intensive six-day course on such topics as pastoral leadership, planning, community building and stewardship. Synopses of the workshops and classes from the 2009 seminar have been posted on the Leadership Roundtable website. Tom Healey has been highly involved in the program since its inception and is the inspiration behind it.

ESTEEM

The third item I'd like to discuss deals with the future of leadership in the Catholic community. It represents our efforts in the area of young adult leadership. It is called ESTEEM, Engaging Students to Enliven the Ecclesial Mission. The program began in the summer of 2009 at a congress held for campus ministers, priests and bishops and lay professionals working to strengthening the church. It is the result of a partnership with the St. Thomas More Catholic Chapel and Center at Yale.

The program is an effort to equip the best and brightest young adult Catholics before they graduate from college to serve in meaningful leadership positions on diocesan and parish councils and

boards of trustees at Catholic institutions. We want to take these young, talented leadership abilities and to really bring them into the service and the future of the church.

In the fall of 2010 six pilot sites at Yale University, Stanford University, Sacred Heart University, UCLA, Michigan State University and the Ohio State University will launch ESTEEM, and will begin to choose students to lead retreats and workshops, seminars and field work to develop leadership skills to build relationships and prepare for life in the church outside the campus ministry setting. We're hoping to create a national cohort of young adults who upon their graduation feel empowered to move out there and tackle a lot of the issues, both to serve and strengthen then church.

We are delighted that this program will attract students at both private and Catholic colleges and universities across the nation. There is also a website for the program, www.EsteemLeadership.org.

Plenary discussion highlights

Fred Fosnacht, MyCatholicVoice

The Archdiocese of Kansas City's finance council has identified a number of smoldering embers and hot spots that we know will be issues in the future. They stem from parish and school consolidations, from high schools that can no longer sustain themselves and a host of similar issues.

We recently initiated a special task force to examine emerging threats to the finances of the diocese. I'm wondering if you're aware of resources that we might access to project threats five years out or 10 years and identify and deal with them now. My sense is they would be similar across many church structures.

Kerry Robinson

We track innovative diocesan efforts to anticipate the future and when we find examples of best practice we try to distribute them. We would be very interested in learning about the experience of your own diocese.

Jim Lundholm-Eades of the Archdiocese of St. Paul-Minneapolis may want to comment on this because this is really his forte. The Leadership Roundtable tries to identify people who with expertise and success in a variety of these temporal matters. Jim is particularly adept at this.

Jim Lundholm-Eades, Archdiocese of St. Paul-Minneapolis

One of the ways the Archdiocese of Minneapolis-St. Paul had addressed the same question is to set up a corporation within the archdiocese, which is intentionally separate, to look at the archdiocese as a whole and go to the parishes that need a level of analysis that's not otherwise available. The corporation works especially to do pro forma projections for parish schools, and never analyzes parishes separate from schools or schools separate from parishes; they're so integrated.

Across the archdiocese they also keep an eye on trends and provide appropriate analysis, and then they facilitate to identify options and solutions. That's allowed us to get ahead of the curve in understanding the problems before they hit and to remediate past errors.

What I notice as I go around to different dioceses is exactly what you're talking about. The problem is repeatable and has been repeated across generations in dioceses; it's not just this generation. What is different is that we can talk about it now and we have the analytical capacity to name the problem and to name the solutions.



Jim Lundholm-Eades

There is also a category we have called the “too hard basket,” the category of parish or school or parish-school combination where the model just doesn’t work anymore. When the model doesn’t work anymore, the hardest thing to ask people to do is to stop doing what’s doing harm. We’ve taken a stance whereby doing harm is not okay anymore; one parish doing harm does actual harm to the whole of the local church.

We’ve had to raise people’s understanding of local church to include the whole of the diocesan architecture, so that their parish has a context, so that parish and school have a context. If you don’t put that context on it, half of the available solutions are missed.

Thomas Healey

Two observations, if I may just add, having seen Jim’s work. The data-driven nature of it really makes the planning exercise more effective and makes a huge difference. He was nice enough to do some work in our diocese, and it really makes a difference. There’s a wonderful quote from Senator Daniel Patrick Moynihan when he was leading the commission to examine Social Security. He said, “Everybody’s entitled to their own opinions, but no one’s entitled to their own facts.” Getting the facts out makes the exercise.

The second observation is something we’ve seen across the country over the five years of the Leadership Roundtable, and that is that different dioceses have very different problems. The problems of a diocese in the industrial northeast, or used to be industrial northeast, are very different from San Jose, where the problem is one of growth. That underscores why the data is so important.

Geoffrey T. Boisi, Roundtable Investment Partners

This is a very important and interesting question because a good portion of our consultancy engagements have been related to Catholic education.

We were invited a couple of months ago by the Obama administration to come to Washington, and were asked whether or not we would be interested and willing to participate in convening leaders about faith-based inner-city education issues. We’ve been discussing among ourselves whether or not we as a group are capable of it and whether we should take on that kind of activity. We do see the interconnectedness from a temporal standpoint; there’s no question about it.

We would be very interested in hearing this group’s perspective because there are some people who have been involved with us from the beginning who said that it may be a step too far for this organization at this point in time given all the other things that we’ve taken on. However, if this is crucial to the financial success or the temporal success or the success of the mission of the church in the United States today, then we can’t ignore it. We have access to intellectual resources. The biggest problem concerns financial resources.

There are so many different initiatives that we have started here, and we're making progress. But we're not anywhere near the market share needed in order to have a real impact on the Church in the United States. To take on the additional and complex problem of education is a real strategic question for the group.

Rev. William J. Byron, SJ, St. Joseph's University

On the point of leadership, there is an emerging leadership and that's represented in this group. But there's an appointed hierarchical leadership in the church and that's not very well represented here. We've got to get them more involved.

A way of doing that might be to put together some really creative case studies that address real problems, for example, the problem of the parish with a parochial school. Then the appointed leadership can sit around the table and talk about it because—and I don't mean to be critical—but they tend, like many professionals, to listen only to themselves. So if you provide the right case study with competence and goodwill some of the solutions will begin to surface in the discussion.



Fr. Bill Byron, SJ

Most Rev. Timothy Senior, Archdiocese of Philadelphia

We in Philadelphia have a very long and wonderful history of Catholic elementary schools, but it is a major drain on the finances of our parishes and, by extension, on the archdiocese as a whole.

This issue, especially on the national level, could be the focus of the church. We bring so much to the table in this conversation, particularly in urban education. In Philadelphia, in fact, we have about 150 schools and about close to 90,000 students, but that's down significantly. We have about 50 elementary schools now with less than 200 students. We're experiencing major losses here in the city of Philadelphia.

It's a tremendous loss to our society that the expertise that the Catholic Church has developed in the provision of cost effective, quality educational services and experiences in urban settings is one-by-one, school-by-school disappearing.



Bishop Timothy Senior

Here in Philadelphia we have this phenomenon especially of a parallel private school system being developed in charter schools. They look like Catholic schools, they act like Catholic schools; the only difference is that they're being paid for completely by the government and the Commonwealth of Pennsylvania. They

attempt to imitate us. I think we have a lot to bring to that discussion. A lot of strategies are emerging. We do have some pretty significant parishes that are growing and certainly can continue to sustain the traditional model of a Catholic school as a parish enterprise, and they should.

But where that's no longer possible, to simply say we're going to retreat from this ministry that has been so effective and is so much a part of the life of our church, it's just a great loss. But we've been unable to come up with a consistent strategy that will help us overcome this. We talk about vouchers and you talk about the church being able to provide these services in a different way with different funding streams. I think that needs the strength of a national conversation. If the Leadership Roundtable could help to facilitate that, I think it would be very valuable.

We have here in Philadelphia a number of strategies that are emerging organically from the communities themselves. They come from parishes or clusters of parishes trying to develop responses to this. We have to start to plan for this in a much more systematic way.

When the diocese begins to do that for parishes we're taking something from those local communities that has always been the ministry of a local parish, and now we're beginning to plan for it. There's a paradigm shift there that's sometimes quite difficult for parishes to accept and to enter into. But I love that idea that everyone's entitled to an opinion but no one is entitled their own facts. That's so helpful in conversations. I would welcome the Leadership Roundtable's facilitating a national discussion about maintaining the Catholic Church's contribution to urban education part of what sustains our cities.

Rev. John J. Wall

Another piece that disturbed us a little was a study of the Archdiocese of Chicago's parishes' financial health. The study divided parishes into cohorts according to wealth, from the neediest inner-city places to the very affluent communities. Twenty percent of the parishes in each cohort were in trouble, so it's not just the poor parishes, but even the most affluent parishes. So it's not just an inner city issue, but it's something that across the board affects every community.

Why is it that in some places there are two parishes next to each other and one school is doing very well and one isn't? It may be a very poor school or it could be a very affluent community. Both are struggling with the same issues.

William McGarvey, Busted Halo

First, I'm wondering if the Leadership Roundtable could collaborate with Notre Dame's ACE program? Second, I do a lot of work with the Archdiocese of New York's Catholic school system. They have a big scholarship program, Cardinal Scholars, as well as Be A Student's Friend. It's wonderful. For years I've worked on their annual reports and they often cite that their graduation rates have been incredible compared to New York City's public schools.



Bill McGarvey

The real issue is now the charter school. A huge percentage of kids in the New York Catholic schools aren't from Catholic homes. The parents are sending them there because they're safe and they haven't had that in the public schools. And there's discipline; there's education. But the Catholic schools have yet to prove that the education they offer is significantly better than a charter school. Do we have numbers on why these are better than charter schools? Parents are seeing brand new buildings going up in the neighborhoods and ask why spending \$2,000 a year is worth it when charter schools offer a great education. It's something on which I think we really must concentrate.

Rev. Donald J. Monan, SJ, Boston College

I think that the question of parochial schools is clearly an enormous one throughout the country, but it's also so large and so complex a problem for us to take primary responsibility for something I think would be a very difficult undertaking.

I would suggest that before we make a decision on taking on such responsibility we sit down with some of universities, because some of the best resources for beginning to resolve what the parochial school system should look like in the future, what its goals should be and what type of programs can be developed, are in the universities today.

I recently received, for example, approximately \$40 million in grant dollars to train principals, both in public and in parochial schools, and another \$15 million to cooperate with the Catholic and public school system in creating multi-service types of programs. In addition to the purely academic subjects, they really try to, within the school system, deal with so many of the problems that families are experiencing, whether they are immigrants or they have legal problems, health problems and so forth.

There's a lot of good work going on in the universities. And still the problem remains that it is just an enormous question as to what the parochial school system should be ideally in this day and age. The problem is real. We should take a part in it. But I think we should sit down with some of the universities and attempt to see what each can do in addressing the problem.

Jim Lundholm-Eades

When I look across the US with regard to parochial schools, what I don't see is any aggregation of talent. I've seen that Notre Dame University has a great initiative in looking at the problem of Catholic schools and financing. Boston College has taken a shot at it. The National Catholic College Admissions Association has been putting out models and so on.

But I don't see anybody taking the initiative to pull all that together so that all those initiatives are talking to each other. And I'm wondering if the Leadership Roundtable, in its unique position of not being beholden to membership the way some of the other Catholic organizations, could be the forum to bring that together. Nobody's been able to do that.

The solution lies, I believe, in a systemic view, not an individual view, and in one that's scalable at the diocesan level. Solving it individually for this parish and then that doesn't work, because the whole system must work. Nationally there needs to be that level of conversation. We know what doesn't work and the solution has often been, "Then let's do what doesn't work harder," which only creates more bleeding.

Regarding the invitation of the presidential administration, there is a risk in doing that, a political risk of entering that conversation. But the fact is that the Leadership Roundtable is the one that's been invited from the faith community. And if not the Leadership Roundtable, then who will be willing to engage in that conversation? I'd encourage you to go for it.

ACCOUNTABILITY IN A WORLD CHURCH: A GLOBAL PERSPECTIVE ON THE CASE FOR COLLABORATION

Mr. John L. Allen, Jr., National Catholic Reporter Senior Correspondent and CNN Vatican Correspondent



John Allen

I want to start with a brief note of gratitude for the Leadership Roundtable, and not merely for the amazing work you do, but perhaps, even more than that, for what you represent. To me, the Leadership Roundtable represents an organizational commitment to tapping into what I regard as one of the great underreported and under-exploited forces in the church today: a vast reservoir of creativity and energy and a kind of entrepreneurial hustle out there among rank-and-file Catholics who are hungry to take their life experience and their professional expertise and apply it to the service of the church, but generally do not have any idea how to go about it.

There is ferment out there. The practical reality is that the ferment is probably composed of a million different ideas, of which maybe only 100 are actually viable, of which only two would actually change the church in some positive way. But the point is that somebody needs to be looking for these two new ideas. That is what you at the Leadership Roundtable do. And you do it exceptionally well. So if you hear nothing else from me today, I hope you will hear this simple two-word message: thank you. Thank you for what you have done, what you are doing, what I know you will continue to do. You have no idea what a precious and valuable service you are performing to the church.

In a rapid-fire fashion, I want to lay out for you a premise, two observations, and a thesis, and then spend the rest of my time trying to illustrate that thesis.

The premise: accountability, collaboration, and transparency are good things and it would be helpful to see them take root more deeply in the church of the twenty-first century. I trust I do not have

to spend any time defending that premise, as these are all qualities that the Leadership Roundtable is intended to foster. As you know, in the Catholic spiritual tradition we talk about the theological virtues: faith, hope, charity. We talk about the cardinal virtues. I sometimes think we need a new set of stewardship virtues. If we were to cobble together such a list, I think most of us would say that accountability, collaboration, and transparency belong on the list.

And now I will make two observations. First, it seems to me that when one makes the case for these virtues in Catholic conversation, one typically invokes primarily American, or Western, points of reference. That is to say that in making the case for greater collaboration, transparency, and accountability in the church, the tendency is to invoke two arguments: one would be the theology of the Second Vatican Council as it's been elaborated from pastoral practice in the United States in the last 50 years, and the other would of course be the sex abuse crisis.

These are perfectly natural and legitimate points of reference. But my second observation would be that in the Church of the twenty-first century it will be increasingly difficult to make an argument for anything that relies primarily on American or Western perspectives.

If the Catholic Church in twenty-first century becomes more accountable, collaborative, and transparent, it will be because the argument for doing so was crafted in terms that speak to the experience of the global church.

Let me just spend a few moments unpacking the “why” of that. We are living through, right now, one of the great epochal moments of change in Catholic history. In this case, the change is fueled in part by demographics. In 1900, at the dawn of the twentieth century, there were 266 million Catholics in the world, of whom 200 million lived in Europe and North America. Just 66 million lived elsewhere, primarily in Latin America. What this means is that just 100 years ago, Roman Catholicism had more or less the same demographic profile as it had at the time of the Council of Trent: an overwhelmingly white, first-world family of faith. One-hundred years later, in the year 2000, there were 1.1 billion Catholics in the world, over 720 million living in the Southern Hemisphere, Africa, Asia and Latin America, and 340 million in the global north.

Another way of putting that point is that a scarce 100 years ago, just 25% of the Catholic population lived in the south. Today it is 66%. If we run the clock forward to mid-century, 2050, the projection is that this number will be 75%. In other words, by the middle of this century, three of every four Catholic men, women, and children alive will live in the global south. This is the most rapid, most sweeping, most profound transformation of Catholic demography in more than 2000 years of church history and we are living through it today.

This is a classic example of what media and technology critic Neil Postman talked about as organic, rather than additive, change. Additive change is when you add one thing, one new element to a pre-existing mix. Organic change is when everything changes at once. And I would submit this is the moment we find ourselves in today. In terms of its scope and magnitude, it is comparable to that moment in the first century when Paul left Palestine, went to Syria, and ultimately went to Greece and Rome, thereby transforming early Christianity from a sect within Palestinian Judaism to a new religious movement in the Greco-Roman world.

One fact I like to throw into the mix for American audiences is the following: There are 1.2 billion Roman Catholics in the world today. There are 67 million Catholics in the United States, which means that we American Catholics represent precisely 6% of the global Catholic population. Six per-cent. Another way of putting that point is that 94% of the Catholics in the world, in important respects, are not like us. It's a much bigger and more complex world out there.

What all of this implies is that increasingly in the twenty-first century, places like Jakarta, Manila, Buenos Aires, and Abuja will be to the church what Paris, Louvain, and Milan were in the sixteenth century: the centers of new pastoral imagination, new political energy, new theological perspective. The bottom line for all of this is that to make a case for anything in this changing church of ours, in this increasingly global church of ours, one has to operate out of a global perspective.

Hence my thesis: If the Catholic Church in twenty-first century becomes more accountable, collaborative, and transparent, it will be because the argument for doing so was crafted in terms that speak to the experience of the global church.

One may wish to debate that, but for the sake of the argument, let's assume it to be true. The question then becomes, "What would those terms that speak to the experience of the global church look like?" In other words, how can we craft the case for the virtues that the Leadership Roundtable is intended to foster? How can we craft the case for those virtues in ways that speak to the experience of the Catholic community in other parts of the globe? I want to give you three concrete examples, to look at three corners of the Catholic world and what the case for accountability, collaboration, and transparency in those three places would look like.

THE MIDDLE EAST

This fall there will be a synod of bishops of the Middle East convened by Pope Benedict. The logic for that synod is quite clear. Christianity in the Middle East is on life support. Christians have been migrating out of the Holy Land, the traditional land of Christianity's birth, since the nineteenth century. This exodus of Christians out of the Holy land has been turbocharged over the last quarter century by a lethal cocktail of four factors. First is the ongoing Israeli-Palestinian problem. Second is the rise of Islamic fundamentalism. Third is the political and economic stagnation of the region. Fourth is the practical fact that Christians of the Middle East have access to Western networks of support that other groups do not have, and therefore have a better opportunity to leave. You wrap all of these factors up together and it is no particular mystery that the Christian population of the Middle East is hemorrhaging.

At the dawn of the twentieth century, Christians represented about 20% of the population in the Middle East. Today, depending on who you listen to, it is somewhere between two and three and a half per-cent. I had an interview with Cardinal Angelo Scola of Venice yesterday in which he referred to this upcoming senate of bishops quite bluntly as the last call for Christianity in the Middle East.

And so there is the argument for collaboration, transparency, and accountability in the Middle East. This is not about stewardship, nor is it about realizing the theology of the Second Vatican Council. This is survival. If the resources of the church are not well-managed or squandered, if Western donors lose confidence in the ability of church leaders in that part of the world to manage resources responsibly, those resources are not going to be replaced. And it will only accelerate what is already in some ways a death spiral for the church in that part of the world.

Recognizing that, the *Instrumentum laboris*, that is, the working document for the senate on the Middle East, contains this language in paragraph 31: “In keeping with the Gospel’s teaching on justice, the church is to manage her patrimony in a transparent manner. Priests and bishops in particular must clearly make the distinction between what is given them for their personal use and that which belongs to the church. Furthermore, the church’s patrimonial holdings should be preserved in order to help safeguard the Christian presence in the Middle East.”

I submit to you that there is probably no Catholic audience anywhere in the world that at least on the basis of human considerations is more inclined to either be interested in the expertise, experiences, case studies and models you have to propose to them than church leaders in the Middle East where the responsible, transparent, and collaborative management of resources is a matter of survival.

SUB-SAHARAN AFRICA

In this region I would say that the argument for accountability, collaboration, and transparency is not nearly the usual odd intra-Catholic discourse, it is also an urgent odd extra matter of social justice. If you were to ask the average Catholic bishop in Africa, “What is your top social justice concern? What do you get out of bed in the morning thinking about?” The answers are usually not the kind of things that westerners assume. That is, it’s not usually war and peace, it’s not usually trading relationships, it’s not usually HIV/AIDS, even though those things clearly are critically important concerns. My experience, however, with the typical African bishop, is when you ask these questions, the first thing they will answer is the struggle against corruption. There is a growing consensus among African bishops that you could have the most magnificent program of overseas development assistance imaginable, you could have the U.N. Millennium goals fully funded, but if these resources are being siphoned off by a corrupt political class, it won’t make any difference at all.

The United Nations estimates that the developing world loses \$1.6 trillion every year in corruption. That is more than four times the combined total of all overseas development assistance coming to impoverished countries from wealthy ones. The U.N. also talks about the “400% governance

dividend,” that is, if you could improve transparency, rule of law, and limit corruption, you could increase the standard of living in developing countries by 400%. There is no other humanitarian or anti-poverty strategy on the planet that has that kind of payout.

The practical result, therefore, is that Catholic leaders in sub-Saharan Africa, meaning bishops, theologians, and lay activists, from top to bottom, have increasingly become the key leaders in the anti-corruption campaign. Most African bishops will tell you that their top priority is the effort to raise a new generation of leaders in their societies that will think in terms of the common good rather than personal enrichment. They want to raise a generation of morally sensitive leaders, committed to the struggle for accountability, transparency, and collaboration in the public realm.

The corollary to that however, is that if the church is not perceived to practice those virtues in its own house, it has no credibility preaching them to the outside world. Therefore, African bishops have become increasingly sensitive to the need to offer their societies models of what accountable, collaborative, and transparent management of resources looks like. They are concerned that if there are scandals about how the church manages its resources, how it manages its personnel, and so on, that hobbles their effectiveness in the public realm, in making the argument for an end to corrupt styles of management. For these bishops, this is a critical social justice concern. It leaks out of the church’s internal life and it becomes the “tip of the spear” in terms of the argument they are trying to make for the broader public realm.

INDIA

India is poised to be one of the new poles in the multi-polar global system that is taking shape. From a Catholic point of view, it is one of the greatest success stories of the twentieth century. The Catholic population in India at the dawn of the twentieth century was around 1 million; today it is 17 million and is projected to be 30 million by mid-century. That will make India the fourth largest Catholic country in the world in which English is a dominant language. There will be more English-speaking Catholics in India by mid-century than in Great Britain, Ireland, Canada, and Australia combined.

India is clearly going to be not only a major power on the global stage, but a major power in the Catholic world. The church in India grew at a rate well ahead of overall population growth in the country during the twentieth century in large part because it became the religious destination of choice for a growing percentage of Dalits, the untouchable class in India. Of the 17 million Indian Catholics today, about 70% of them came from the untouchable class. They saw Catholicism as an antidote to the religious oppression they experienced within the dominant religious traditions of India, of course predominantly Hinduism.

In this way, the growth of the church is not only wonderful because of the evangelical successes being done, but Catholicism in India is also a great social justice story. It has become a refuge for the Indian under-class, and it is to the church’s internal credit that we’ve provided space and outreach for that population.

It is, however, a population that is in many ways under siege and, in the Indian context, the argument for accountability, collaboration, and transparency becomes one of self-defense. India is also characterized these days by a rising tide of Hindu nationalism and Hindu radicalism, which at times becomes violent, but is overtly committed to try to hem in the expansion of Christianity and, if possible, to roll it back. The standard anti-Christian argument is that Christians in India are buying converts. That is, they are using Western financial resources in order to proselytize, dangling financial incentives and enticements in front of India's impoverished masses in order to convince them to become Christian.

In that context, the ability to give a credible public rendering of how the church uses its resources and to do it in a way that is transparent, that is accountable, and that can withstand the critique of even the church's most embittered critics, that is a kind of data-driven objective empirical accounting of the management of resources. Not just something that is theologically defensible, nor managerially desirable, but becomes a critical element in the church's ability to defend itself, politically, culturally, and socially, from its most devoted, and often dangerous, critics in the Indian context. My point is that if you look around the Catholic world, there are plenty of places where responsible Catholic leaders are not only open to, but are actually desperate for, the tools to promote accountability, transparency, and collaboration that you have to offer them. We, collectively, have to understand how to make the case for those tools and to offer them in ways that speak to these experiences.

My point is that if you look around the Catholic world, there are plenty of places where responsible Catholic leaders are not only open to, but are actually desperate for, the tools to promote accountability, transparency, and collaboration that you have to offer them.

There is a parable I can use to help drive this point home. It is set in the jungle. One day the lion, who was king of the jungle, was feeling particularly self-assertive. He walks out of his cave and sees the monkey swinging in the trees, and says, "Hey monkey, who's in charge in this jungle?" The monkey says, "Well, of course you are, your majesty." The lion says, "That's right. Don't you forget it." And then the lion sees the serpent slithering through the trees and he says, "Hey serpent, who's calling the shots around here?" The serpent says, "Well, of course you are, King Lion." The lion says, "That's right. And don't forget it." Finally, the lion sees the bull elephant. He walks up to the bull elephant and says, "Hey elephant, who is in charge around here?" The elephant gets this smile of bemused condescension and picks the lion up with his trunk, swings him around in the air, brings him crashing back down to the earth on his head and then slowly lumbers off into the distance. As he does, the lion gets up, dusts himself off and yells after the elephant, "Hey look, just because you don't know the answer is no reason to get an attitude!"

The parable is intended to illustrate the importance of perspective. If we start out with a set of assumptions about what is going to drive behavior, about how the world works, and insist on imposing our own perspectives and assumptions on experience, it is a prescription to end up on our heads in the jungle.

On the other hand, if we allow the experience of global Catholicism to speak to us, if we start with that experience and craft our proposals and initiatives in ways that respond to that experience, I believe this is a successful strategy for Catholicism in the twenty-first century.

Plenary discussion highlights

Geoffrey T. Boisi, Roundtable Investment Partners

John, How would you apply that same thematic approach to the leadership of the Catholic Church in the United States?

John Allen

First of all, I think the demographic dynamics of the global church which I described are increasingly our dynamics too. If you look at the most recent Pew study on religion in America, its findings project that the year 2030 will be a watershed moment for Catholicism in the United States because it will mark the first time that whites are no longer a statistical majority of the American Catholic population. By 2030, white Catholics will represent 48% of the Catholic population in America, Hispanics will be 41%, Asian-American Catholics will be 7.5%, Africans and African-Americans will be 3% and growing. That is also an important distinction: we have traditional African-American populations, but we also have a rapidly swelling African diaspora in the United States, which is disproportionately Christian. In the Archdiocese of Washington, there is a parish that is composed almost exclusively of refugees from Sierra Leone.

So the demographics of American Catholicism, increasingly in microcosm, reflect the demographics of the global church. This increasingly multi-chromatic, multi-cultural, multi-lingual, wildly diverse Catholicism is right outside our doors.

The other point is that obviously at the moment the argument for more collaborative, accountable, transparent modes of doing business in the church is the sexual abuse crisis that has been our experience over the last 10 years. What I would also say is that we must be conscious that among many bishops there is a companion concern, that one legacy of the crisis might be a subtle watering-down of the traditional governance role and authority of the bishop. I think there is some concern among many bishops that the fallout of the crisis has been, in some circles, to embolden criticism of and attacks upon the hierarchical struc-

ture of the church. Therefore, in the American context, the argument that is going to cut ice with church leaders in terms of collaborative modes of doing things is that this is not intended to supplant or replace hierarchical authority, but is intended to enhance it. First of all, it is intended to allow bishops to do those things they are ordained to do and they are trained to do: to teach, preach, govern, and sanctify. Second, it is intended to ensure that the moral credibility of the bishops is not undercut by scandals and crises that we could avoid through more intelligent modes of managing our resources and doing business.

I think to move this argument forward in the American context, it has to begin from the sex abuse crisis, but it also has to begin with understanding psychologically how bishops think about and approach this crisis. I think what you would find is that most of them are fully committed to figuring out more transparent, accountable, and effective ways to do things, but that is wedded with this concern about making sure that ultimately the governing authority of the episcopacy is not eroded. The winning strategy is to be able to hold those two things together and show how one serves the other.



Fr. Edward Malloy, CSC

Rev. Edward Malloy, CSC, Notre Dame University

As a member of an international religious community, I have opportunities to interact with people from a range of different parts of the world, as you have mentioned here. I see many people coming to be educated in this part of the world and then returning to their countries. When they return, one of the challenges is that they have inherited certain structures and expectations for resources. They also must figure out how to distribute the resources they have with accountability on the other side, not having to fear the disappearance of such resources through corruption or incompetence.

I think a large part of the challenge is that we are educating people according to the standards here, within our context, and they must make the appropriate cultural transitions. These are very complicated matters, the need for tremendous accountability and the proper distribution of resources when they go across continents.

John Allen

Well, if your point is that this is complicated, of course it is. It brings to mind that line from the movie *Major League*: “Is it hard? Of course it’s hard. It’s supposed to be hard. If it were easy, everyone would do it.” I think that applies here as well. You are right in that when crises erupt, this challenge becomes most clear. The overwhelming generosity of American Catholics and Americans generally in these kinds of moments is a tribute.

But there is a kind of tendency to want to flood a place with resources and personnel, and insist that the reception be according to standards we have developed. It's a complicated business to negotiate that place by place.

One note I would add while affirming everything you have said is that my experience of moving around the Catholic world is that there is a kind of love/hate mentality out there for American Catholicism. On the one hand, there is enormous admiration for the resources and accomplishments of the church in the United States, but on the other hand there is also a kind of resentment, and this of course piggybacks on broader perceptions of the United States, that we like to get our own way. This is illustrated in something as basic as the number of cardinals in the world. You probably know that today there are 191 cardinals, of whom 113 are under the age of 80 and therefore eligible to vote. Of those 113 electors, 13 are Americans. That's the second largest national block in the world beyond Italy. In the conclave in April 2005, there were 115 cardinals who voted. There were 11 Americans, which was more than all of Africa.

We can also connect it to the sex abuse crisis. I would say that part of the debate about the American norms that erupted in 2002 and still goes on in Rome is in many ways related to the perception of the norms that were adopted in the United States, the heart of which is the one strike and you're out policy, that are a departure from canonical tradition. It is another example of the American church insisting upon playing by its own rules and being given the green light by church authorities.

When we try to work out solutions with the global church, concerns about proper stewardship of resources and response to very real inequalities, there needs to be sensitivity to the fact that there are preexisting impressions of the American Catholic Church, that it already carries far too much weight, and a disproportionate amount of influence at the policy-making level of the church. We must wade through those perceptions and make it clear to people that you are interested in working out solutions with them rather than imposing on them. I think once you get over that hurdle, it becomes easier to collaboratively build in those safeguards you are talking about. However, you must be aware that when you move around in the Catholic world, you are carrying the American flag on you shoulders and that can be an ambivalent experience in many places.

Rev. Edward Malloy, CSC

I distrust the demographic claims about the size and scale of Islam and Catholicism. It seems to me that they are based on one reference point, whether a person was ever baptized. Through much of Latin America, it is not clear that there was any connection between a one-time event and the capacity of the church to be available to that person, catechistically or in any other way. If you take a country like Brazil, it is easy to make it a mega-presence in the life of the Catholic Church universal in a way that I think does not correspond to the reality of the way the church has been formed.

John Allen

These numbers are baptismal counts. They do not correspond to levels of religious faith in practice, but they are a measure that we have and reflect in a minimum way someone who has been touched by the Catholic Church at some point and has had some kind of connection to the church. But you are right in that Latin America is traditionally a great example of a region of the world that is overwhelmingly Catholic and yet actual levels of faith in practice are remarkably small. This is in part because there has long been a clericalist pastoral model.

Here is another set of facts: I think sometimes in the American church, we are tempted to believe that the solution to the priest shortage is going to be the importation of priests from abroad. The presence of international priests is a defining feature of our time. One of every 6 priests in the United States currently serving in a pastoral assignment was born overseas. We add 300 new international priests every year. These are positive things. But if we look at the global situation, the reality is that however bad we think the priest shortage to be here, it is infinitely worse in other parts of the world. In the US, again relying on baptismal numbers, we have a ratio of one priest for every 1,300 baptized Catholics. In South America it is one to 7,800. In sub-Saharan Africa it is one to 5,500. In Southeast Asia its almost one to 9,000.

Yes, the church is certainly growing in sub-Saharan Africa and India, but it is growing in a way that we are baptizing people much more rapidly than we are ordaining them. From a systems analyst perspective, when you look at the Catholic Church, two-thirds of our people are in the global south, but two-thirds of our priests are in the global north. That does not make a lot of sense in some ways.

My point here is that there are reasons why in Latin America particularly the levels of faith in practice have often historically low, and part of it is shortages of clergy. The typical Latin American pastor I know is not only working in one of those mega-urban parishes where he has 30,000 families to worry about, but he is also serving 6 to 12 satellite parishes out in the hills that he may be lucky to see once every six months. In addition, he is probably teaching a half-time course load at the seminary and is also moderating 6 or 7 lay movements. In that situation, the ability to deliver a routine of pastoral care in a way that you can nurture and sustain an active life faith is obviously very complicated.

What I would say, since we are on the subject of Latin America, is that I do think there is some case for hope in the Latin American church. If you look at the numbers, the percentage of mass attendance has been going up for the last quarter century, the number of lay movements has been increasing, there is a slight uptick in the terms of vocations to priesthood and the religious life. In part you could say that finally Vatican II is coming to Latin America, and there is some truth to that. I think the more practical reason for it is the

market competition, a dramatic religious realignment; a continent that was once homogeneously Catholic is becoming increasingly diverse.

Take a place like Guatemala, where, a generation ago, according to the numbers, was 97% Catholic. Today it is Latin America's first majority Protestant state. Almost all that shift has been in favor of the Christian Pentecostals, who are easily the most rapidly growing religious movement in the world. They have a real entrepreneurial ethos. Guatemala City has the largest Pentecostal Church anywhere in the western hemisphere. It's one of those soccer stadium-style churches that can accommodate tens of thousands of people and holds 13 services every weekend in about 6 different languages, including the indigenous local tribe languages. And in the inevitable fashion of Pentecostalism, it actually has corporate sponsorship. Do you know the name of the street that leads you up to this church? It's called Burger King Drive because the CEO of Burger King Guatemala is a deacon at the church. Another thing they do very well is they mobilize their laity. It is not a top-heavy clerical operation. As I say, its entrepreneurial-owned, grassroots.

I am enough of an American capitalist to believe that a little bit of competition is a healthy thing; it prevents you from going to sleep. And I think that in Latin America it's a positive thing. It is a part of the world we could also talk about as a case for collaboration, but the primary thing about Latin America is the competitive dynamics of the religious marketplace and the need to manage resources effectively so that Guatemala, in miniature, does not become the story of the whole continent.

Kathleen McChesney, Kinsale Management Consulting

Are there positive points of influence that Americans offer to the Vatican and the Holy See? Is there something we could do better to be of greater service to the universal church?

John Allen

I think one of the great Catholic success stories of the last 15 years has been the profound shift in attitudes in the Holy See about the United States generally and about the American Catholic Church. I can even remember when I arrived there in the mid-90s, there was still a kind of stereotype about America being a cowboy culture and the American Catholic Church being this kind of rambunctious outfit with only tenuous loyalty to Rome.

Today I would make the case that certainly Pope Benedict XVI is the most pro-American Pope in the history of the Catholic Church. And I think that reflects a culture shift in the Holy See.

But today, I also think Rome can have an overly romantic perspective of the realities of the US and the American Catholic Church. There are several points to explain that, but certainly one of those points is what has happened in the European Union over the last 15 years. There is a perception of a runaway hyper-secularism afoot in Europe that has been

devastating for religious faith and practice. People talk about an “ecclesiastical winter” in Europe. By comparison, the US looks pretty good. Although we may sometimes bemoan the fact that on average only 25% of Catholics attend mass every Sunday, when you compare that number to much of Europe, it looks remarkably good. In France, that number might be 5%, or in Belgium it may be 3.5%.

The United States looms for them as a great model of a developed nation where secularism has not yet completely laid waste to the sort of public relevance of the faith. A real moment that crystallized this was the fall of 2004. In the United States, we had the Bush-Kerry election, but the big political story in Europe was the nomination of Rocco Buttiglione, who is a well-know Italian politician and a good friend of Pope John Paul II. He had been nominated to become the new European Commissioner of Justice. Shortly after the nomination had been made, Mr. Buttiglione gave an interview to a French newspaper, during which he was first asked: “Are you opposed to abortion?” His answer was: “Well, as a Catholic I am personally opposed to abortion, but that is separate from my public role. I would not impose that as a matter of civil law.” That was the classic pro-choice Democrat answer in this case. He was asked secondly: “What are your feelings about homosexuality?” And he answered: “Well, again, as a Catholic I am morally opposed, but, again, that is separate from my role as a public official.”

On the basis of these two answers, his personal moral opposition to both abortion and homosexuality, Buttiglione ended up getting blackballed as the European Commissioner of Justice. Ironically, that vote came down on the day before the election in the US where you will remember that John Kerry’s big problem was that he was not Catholic enough.

My point is that many Vatican officials took notice. If you have a climate in the US in which someone must be religious in order to be elected to public office, and you have a climate in Europe in which being religious is almost enough to ensure that you cannot hold public office, they can draw the conclusion that the US is really the best game in town.

My perception is that we are in a moment where the outlook of the American Catholic Church in the Holy See is fundamentally and pervasively positive. Some of the old concerns are still alive and Vatican officials who do not come from the United States are as susceptible as people from any other part of the world to harbor a certain kind of ambivalence about what they see as America’s excessive influence and insistence on doing things its own way, but fundamentally, I think the disposition is extraordinarily positive. This creates a moment in which initiatives, ideas, and new energy that come from the American Catholic experience are received in the Holy See with an openness that is qualitatively new.

That has to be held in tandem with the fact that the number one job, for both the pontificate of John Paul II and Benedict XVI, was what I have described as evangelical Catholicism, to attempt to foster a strong sense of traditional Catholic identity. They will

be discerning those initiatives and ideas to see whether they may threaten or imperil or compromise that Catholic identity, but if it passes that small test, I think there will be an even greater eagerness for the momentum coming out of the United States and translating that into something that can affect the global Church.

Rev. John J. Wall, Catholic Church Extension Society

When we think of American Catholicism we may look back with some pride at that moment we call the immigrant Catholic experience and see ourselves now as post-immigrant. Talk to me about your prospects or your outlook for us in taking this moment of the new immigration experiences and the American Catholic experience and making this a moment of not only challenge but opportunity for us.

John Allen

There is no doubt that, in some ways, demographics are taking a sizeable chunk of the Catholic Church in twenty-first century America back to where it was in the nineteenth century. That is, primarily a blue collar immigrant church. One would hope that this would unleash new energies into the twenty-first century American Catholic experience, comparable to what happened in the nineteenth century.

My concern is that the changing demographics of the American church will extend and prolong the current moment, rather than beckoning us into a new movement. I would describe the current movement as one of tribalization.

I think if you had a hypothetical sociologist parachute down to the United States from Mars and try to study the American Catholic Church, what he or she would conclude is that there is no such thing as Catholicism in the United States. What we have are Catholicisms, multiple Catholic Churches in America. What we have is the neo-con church, the liturgical traditionalist church, the reform crowd, the peace and justice church, and so on. In principle, of course, all that diversity is an enormously positive thing, but it becomes unhelpful when those tribes stop communicating with one another and actually come to see one another as the enemy. All too often, as we are painfully aware, that is our situation. The practical reality is that these different churches in America tend to inhabit their own worlds. They go to their own conferences, with their own speakers, read their own journals, have their own websites, etc.

The truth is that they have moved so far down separate paths that in the rare moment when people inhabit two of these different tribes come into contact with one another, they would not only have differences of opinions, they would not even agree on what is happening. They would have completely different senses of what is actually going on within the church.

My concern is that the changing demographics of the church will simply increase the number of tribes that we have in the landscape and fundamentally change the lay of the land.

In addition to interest groups within the church, we will also have the Bolivian Catholics, the Brazilian Catholics, the Vietnamese Catholics, etc. They will learn the way American Catholicism works and minimize their interaction with everyone else as much as possible.

I think that is a plausible, possible trajectory. If we are going to break out of that and foster a Catholic ethos that the traditional language for which is a spirituality of communion, a spirituality in which we see all of us as part of a large Catholic whole. In order to foster that spirituality of communion, it is going to require a counter-cultural effort on our part.

Where are the spaces in the Catholic Church in the United States where members of these different tribes just naturally and organically come into contact? Does it happen in parishes? I do not think so. You can walk into any diocese in America and ask people: Where is the traditionalist parish? Where is the liberal parish? Where is the Hispanic parish? Everyone can tell you because we all know. Does it happen at Catholic universities? Again, I think not. My experience with theology departments at Catholic campuses in America it that, by and large, they tend to be “exhibit A” is the case that we are overly tribalized. Does it happen in the Catholic media? No. Every national Catholic publication in this country has a clear ideological alignment and we all know what it is.

The traditional institutional venues that ought to create space in which this spirituality of communion can organically emerge; they either do not exist or they have been co-opted to serve one or another tribe’s agenda. It’s going to require an act of will to carve out these spaces. This effort is not just a matter of doing justice to the changing demographics of the church. There is also something broader at stake here: the genetic genus of Catholicism is its capacity to see “both/and” solutions where others see “either/or” problems. In our capacity to realize that and bring it to bear creatively in the challenges of the twenty-first century, it is going to require a self-conscious effort to foster a broad spirituality of communion. To do that, we have to realize that we are swimming against the tide in the church as its presently constituted and we are swimming against a broader cultural type.

Thomas J. Healey, Healey Development

My question is about communications and in particular, the reports of sex abuse in Europe over the last few months. I think many would consider the Vatican’s response to be a failure. Has anyone in the Vatican ever asked you, as an expert in this field, how they can communicate better? If they did ask you that question, what would you recommend?

John Allen

Usually when people do ask me what I think about the Vatican’s communications strategy, I say, “As soon as I see evidence they have one, I will tell you what I think about it.” The practical reality is that it’s been amiss, and for a long time. I think we succumb to the mistaken perception that under John Paul II, the corporate communications difficulties of the Holy See had either been solved or were at least moving towards resolution. Not so.

The communications capacity of the Vatican under John Paul II was very closely tied to his personal charisma.

Now we are back to the same dynamics we had pre-John Paul II, which is that communications is not a corporate priority, that the Vatican press office is under the thumb of the Secretary of State which operates on a whole different logic that has nothing to do with public relations effectiveness. The pope, in his own way, is a magnificent communicator, but is not a kind of twenty-first century, mass media sort of communicator. Therefore it is a kind of meltdown from top to bottom.

Now you have asked have people in the Holy See asked me how to affect it? Of course they have asked me and many other people over the years. I usually lay out a whole series of things they might want to do, beginning with the key point that we have to get back to an understanding that whoever is the spokesperson for the Holy See has to be a decision-maker. It's not enough to make a decision and then bring them in afterwards to make copies of it. They have to be at the table when the decisions are made so that communications can be an integral element of making those decisions. It is complicated, for political and bureaucratic reasons. I think the good news I offer you is that collectively these scandals and crises have created an understanding in the Holy See that something is not working and they are sort of grasping now to figure out how to fix it.

LESSONS LEARNED: THE US RESPONSE TO THE SEXUAL ABUSE CRISIS

Dr. Kathleen McChesney

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Most Rev. Blase Cupich

Diocese of Rapid City

Ms. Diane Knight

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Ms. Teresa M. Kettelkamp

Executive Director, Secretariat of Child and Youth Protection



Kathleen McChesney

Kathleen McChesney

It is a privilege to be a part of this panel this morning to talk about the lessons learned in the response to the sexual abuse crisis here in the United States. This also gives me an opportunity to recognize that over the past decade there have been thousands of men and women, lay and clergy, who have participated in making things better.

An accident is defined as a chance event, happening without any planning, apparent cause, or deliberate intent. Given that particular strict definition, there are probably very few real accidents because we can generally find a plan, a cause or an intent associated with most events and most crises.

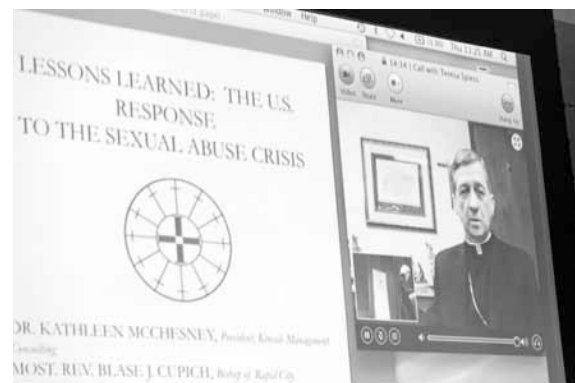
Following that premise, then there are four things that are our panel this morning is going to discuss that are not accidents. The first is that it is no accident that over 15,000 men and women reported abuse by Catholic priests or clergy in the United States that occurred between 1950 and 2002. The second is that it is no accident that the incidents of abuse of minors by Catholic priests and deacons in the United States in recent years has significantly diminished. Third, it is no accident that despite this reduction in the number of abuse cases, the problem of sexual abuse by clergy is still very real in the United States and around the world. Fourth, it is no accident that the Catholic bishops in the United States have become more accountable and more transparent in their actions in dealing with allegations of sexual abuse and preventing such actions from occurring in the future.

In light of the recent events and allegations of abuse around the world, the Leadership Roundtable thought it would be very timely at this point to include a panel on this important topic in order to inform you of the collaborative efforts made within the church since 1994 to deal with the crisis of sexual abuse, and also to provoke thought for universal actions for the protection of children.

Our panelists today are going to share some of their insight and experiences with you.

Bishop Cupich

Taking into consideration the umbrella theme of your conference, my remarks are going to be centered on what really took place in 2002 [at the annual meeting of bishops in Dallas to address sexual abuse of minors] as the seminal event, the wake-up call for the entire church in this country, but especially the United States Conference of Catholic Bishops. I believe that was an event in which two very important things happened that should be seared into memory and the imagination of the church as we move forward.



Bishop Cupich, via Skype

The first was the dialogue and the testimony of those who were victims, who stood before us in Dallas at that meeting and shared with us their stories of abuse. That had a lasting imprint on the minds and the hearts of the bishops. The second point I am going to talk about is the movement that followed that imprint of the bishops coming together in collaboration, in not only pledging that we would work together, but that we would hold each other accountable. That collaboration had to go beyond a voluntary agreement: we swore ourselves to a mutual accountability. That, of course, is not only codified in the charter, but the essential norms recognized by the Holy See.

I do not think there was anyone in that room in Dallas, in which we heard the testimony of various victims come forward, and other people who spoke to us, that did not leave the bishops feeling ashamed and resolute that we had to take dramatic action. And we did take dramatic action, by changing the way we approach this.

In the 12 years I have been in Rapid City, I have had the opportunity to speak directly to the victims. Anytime a victim comes forward, I make myself available. I can tell you, those are graced moments. They are painful moments. They are difficult moments. But they are great graces, because when you share the pain of another person and you allow them to tell you how they have been hurt by people within the church, it is an opportunity for you to recalibrate your whole ministry. It tells you there are many voices out there that the leadership does not hear to which we must be attentive.

In many ways, that dialogue can be a paradigm for all ministry and it can enrich our ministry. Many times, in the work of a bishop and the work of the diocese, we become so very focused on other issues that come across our desk every day. It is sometimes easy for us to be removed from those heartfelt voices within the life of the church. By listening to victims, it opens the door in a wider scope, allowing us really to be attentive to those voices on a number of levels. I think that could be the real grace that happens in that dialogue and presentation.

I think it is important always to go back to that moment of pain and difficulty and shame. Not in a way that we beat ourselves over the head or that we wallow in self-pity or begin to find ourselves helpless, but we need to go back to that moment because it will help us as we move forward. We need to keep fresh the visceral connection we have with victims because that is the only way we are going to be true to what we said. We cannot make this only clinical, a matter-of-fact or a detail we check off in the long to-do list. In order for us to really be true to our words, we must have a visceral connection with the victims and keep that alive with ongoing discussion. Dallas was an important moment in the life of the church.

The second aspect is how all of that galvanized us to work together in a collaborative way and put measures in place by which we would be mutually accountable. That, of course, is done primarily through the audit process every year, but it is also in making the US Bishops' Committee on the Protection of Children and Young People a standing committee, rather than an ad hoc committee. So that there is a chair who is selected by the full body and each region then has a representative. It is the only committee in the Bishops' Conference that does that, by which every region elects someone to serve on that committee, giving their endorsement to that individual to represent them in the ongoing dialogue and work of the committee. I think it is important to keep in mind that this was a major shift.

In 1992, when many of those items were discussed and should have been handled in a different way, the agreements that the bishops came to were all voluntary. Ten years later, we made them mandatory. We said in the statement of mutual accountability at the end of the charter that we would continue to hold each other accountable. I think that is unlike any other organization that I know of, as vast and widespread as we are in the United States, that has that kind of mutual commitment.

. . . we have in place a framework in which we are going to hold each other mutually accountable. . .

Does it mean its perfect? No. Does it mean that we do not have any work to do? No. It is ongoing. At least we have in place a framework in which we are going to hold each other mutually accountable and have the freedom to say that to each other in a very public way through the audit, but also in the way that we discuss these items on our committee and then in the full body. I think this does

not mean that all the issues and problems are dissipated, not by any stretch of the imagination, but that something very dramatic happened in Dallas. I think we need continually to embrace what happened as our own and make it our own. Over 100 bishops have been appointed since 2002. Veterans like me and others must keep that on the front burner of the agenda of the conference. I am committed to do that and I know my committee members are as well.

Diane Knight

I really think Bishop Cupich speaks so powerfully about that moment of realization that occurred for the body of bishops back in 2002. It seems to me when I hear that they reached that realization to act together rather than alone, that it really was a watershed moment in the life of the church in the United States.



Diane Knight

Of course the blueprint that their action took was the charter. I think most of you know part of what was created by that charter was

the National Review Board. This board was created to bring together the skills and expertise of men and women from across the country who could work together as a body and provide expert advice and consultation to the bishops, to collaborate with them in their efforts to respond effectively to the crisis and to protect children and youth from ever again being the victims of such horrific crimes.

The functions of the National Review Board as laid out in the charter are the following:

- To advise the US Bishops' Committee on the Protection of Children and Young People on matters of child and youth protection, and specifically on the development of policies and practices;
- To review the work of the USCCB Secretariat of Child and Youth Protection and make specific recommendations to the director, assisting him or her in the development of resources for dioceses;
- To advise the Committee for the Protection of Children and Young People on the annual audit process, prescribed in the charter as Bishop Cupich said, including the audit methodology, scope, and personnel;
- To review and approve, prior to publication, the annual report that is prepared and produced by the Secretariat but includes the results of the annual audit and of all of the various efforts of the church in the United States, to implement the various aspects of the charter and its standards. The board's review report is prepared and made directly to the conference president before it is published;
- To advise the conference president on future members of the board and future direc-

tors of the Secretariat;

- To oversee the completion of and dissemination of the results of the causes and context study of the sexual abuse crisis. This is a major academic research effort undertaken to understand fully what happened in the past that resulted in this crisis so that we can prevent it from ever happening again. The board's oversight has included periodic assessment of the data and of the preliminary results of the study process as it has unfolded over time;
- To consult, as required, with the conference president, with the Committee for the Protection of Children and Young People, with the administrative committee and with other relevant church authorities and entities on matters relating to the protection of children and young people;
- To alert and inform appropriate parties of any concerns that emerge from all these responsibilities and that run counter to the spirit of the charter;
- and, overall, to make appropriate recommendations to prevent sexual abuse of minors by anyone in the church.

Over the 8 years of the National Review Board's existence, a variety of skill sets and expertise have been represented on the board, including legal, medical, psychological, law enforcement, education, and human services.

The board's current members include three judges, whose experience includes juvenile and family law, a child psychiatrist, three clinical psychologists, three educators, a communications expert, an organizational development professional and a social worker with child protection background.

The board carries out its responsibilities, as do most boards, through a committee structure which includes, as you might anticipate based on the functions that I have discussed, an audit committee, a best practice committee, a communications committee, nomination committee and a research committee.

Critical to our work right now and in the coming months is the anticipated completion of the causes and context study being completed by the John Jay College of Criminal Justice. The research committee has worked hard over many months now to ensure a timely completion of this major work and is working collaboratively with the communications committee on a plan for effective dissemination of the results of this important work.

Overall, the work of the board has been and is to work collaboratively with the bishops and the US Bishops' Committee for the Protection of Children and Young People and over the years we have had several joint working groups on key charter-related issues. Ultimately, because we are separate from the established ongoing structures of the church, I believe that our work as a board is critical for the credibility and ongoing accountability of the bishops' efforts to keep the promises they made in the charter, the promises to keep children safe.

Teresa Kettelkamp

As an insight, this issue, the sexual abuse of minors by clergy, is not going to go away as a lot of people thought a couple of years ago. It is a human problem and I believe we will be dealing with these efforts, to protect children and reach out to those who have been wounded by various crimes, for as long as I am not only in this position, but probably for the rest of church history.

I agree that the challenges we face as a church are not for the faint of heart. The challenges we face today, whether its urban education or addressing this crisis, takes a lot of courage. It takes looking at the culture of the church and seeing what we as a church

need to do to change that culture to incorporate ways to make those things which have happened in our past better. Those problems that we have encountered minimize for the future generations.

We talk about a blueprint for responsibility, responding to crises with collaborative solutions. I think how the Catholic Church in the US has addressed this issue is a perfect example of addressing a crisis through collaborative solutions.

Let's look at the framework in the charter. What the Catholic Church in the US has done to address the clergy sexual abuse crisis through this document is a tremendous blueprint, not only for this country, but for other countries as well. It has four sections, each made up of particular articles. The first section promotes healing and reconciliation and the second section guarantees an effective response. The third section, which we are going to focus on today, is to ensure the accountability of our procedures in the voice of the bishop. The last section of articles talks about the protection of the faithful in the future, including our safe environment program training and our background evaluations.

The section we are highlighting today is Section 3, to ensure accountability of our procedure. Article 8, as Bishop Cupich mentioned, renewed the mandate of the ad hoc committee and reconstituted it to make it a standing committee. The power of that change is that now the chair of the ad hoc committee sits at the table for the administrative committee. Article 9 created the Secretariat of Child and Youth Protection. Article 10 establishes that all issues involving child protection are coordinated through the ad hoc committee in collaboration with the National Review Board. Article 11 is critical because, as we prepare the annual report of audits, we are mandated to send a copy of the annual report to the Holy See.

Taken together, these are huge accountability measures being put into place. The bishops knew that their word needed to be backed up and that the crisis they faced required collaboration with more than just their brothers. They brought in the National Review Board and established the Secretariat of Child and Youth protection to provide resources to the diocese to help them establish safe environment programs for children and oversee the audit process.



Teresa Kettelkamp

It is not that the church woke up in 2002 and decided to address this issue. The difference in 2002 was that the church stepped up outside its normal behavior and established an office to help oversee an external audit process. It also established a National Review Board to work collaboratively with the bishops to look at the issue and decide what needs to be done to ensure this crisis and this problem will never happen again.

One of the things I talk about is how the Catholic Church addressed this crisis through collaboration, establishing these accountability measures with the audit, and establishing the secretariat for assistance to construct a blueprint for other countries.

In this country we have trained over 5 million children and over 2 million adults in safe environment program training. We have done more than any other organization in the US in getting visibility for the efforts of the Catholic Church, which has been a huge struggle. It's like good Catholic news does not sell. But you can be very proud of what the Catholic Church has done to address this issue in a collaborative and accountable method. While I personally feel as though we should not need a charter to tell us to keep children safe, to reach out to those people who have been wounded, we have one and it signifies a change in the culture of the Catholic Church. With this process, accountability, and collaboration, we will get the credibility back and we'll have a much safer church.

Plenary discussion highlights

Rev. Robert L. Niehoff, SJ, John Carroll University

One thing I do not think we hear enough about is the length of time it takes to adjudicate cases and what happens to the individual who has been accused. In Cleveland, we have some cases that have gone on for 5 years or more. Everyone is frustrated, including Bishop Richard Lennon, who went to Rome to try to get these cases adjudicated. Many of us realize that Rome is trying to protect the rights of these individuals, as well, and what a terrible situation to be in, but we need to do something to communicate to our communities why this is taking so long and why nothing has been adjudicated.



Fr. Robert Niehoff, SJ

Part of the difficulty comes from a split in our parishes into two groups: those who support the accused individual and those who support the individual who came forward with the charge. We have not talked enough about how those parish communities especially need healing and how this lack of adjudication only adds to the pain.

The third piece for me is having experienced the regularity with which other charges are coming forward, whether issues of racial discrimination or harassment or sexual inequality, I think its time for our community to engage those issues more directly and more openly, even though it may be difficult to talk about them. I really feel for the bishops and committees that are trying to make these decisions, but our communities are divided and we have to find some way forward.

Bishop Cupich

I do know that in 2001, when the norms were changed under the Congregation for Doctrine and Faith to require bishops to send over cases involving the abuse of minors, to the congregation, the process became more streamlined. However, the congregation did not have adequate staff right away, so they were deluged with the cases that were built up over the years and have done their best to try to move them forward. I can speak from my own experience, that in the cases we had, we needed to provide additional information. Many times, the Holy See is caught in a position of trying to move forward on a case, to adjudicate it, but it does not have the complete information that is needed in order for that to happen. I do not know if, in the cases that were mentioned, if that lack of information was at the cause, if the congregation continues to be deluged. I know in my own case that when we provided the Holy See with all the documentation that was needed in a timely way and we pursued it, we received responses quite quickly and were pleased with how that happened.

I think that the question puts me on obligation to pursue a conversation at that level of the episcopal conference, to see whether or not the bishops feel that more needs to be done in moving those cases along. I really believe that maybe we could be of help. The second layer, the impact this has on communities, we surely can be of assistance to dioceses to look for ways in which parishes can experience healing in this regard, as well.

Alice B. Hayes, University of San Diego

Have you offered, or have you been asked to consult with some of the churches in Ireland and Germany and elsewhere that are having similar problems? Have you been sharing experiences with them?

Teresa Kettelkamp

People ask me that all the time and I can answer it very simply: no. And it's unfortunate because we have a lot of learning that we could share with other countries. But, having said that, the US conference participates in what is called the Anglophone Conference, which is in its 10th or 11th year. The Anglophone Conference is made up of all the other English-speaking conferences and we meet once a year, alternating between Rome and a conference's country. So in that way we share information, but we ask that same question of the countries at the table, Ireland, Scotland, and Australia. The only example at the table was that a religious order in Germany had reached out to a religious kind in Ireland and said, "What on earth do I do?" So there has been some kind of conferences in that arena, but I am not aware of any of the other conferences reaching out to the English-speaking conferences.

Maybe what they are doing is reaching out to Rome, as all roads lead to Rome, asking for advice and Rome, based on their knowledge of what the other countries are doing, is providing them advice and counsel. But as far as reaching out directly to me or the National Review Board, no, which is too bad because we have many years of experience in what works and what does not work.

Bishop Cupich

I would say that, given the fact that our documents are quite public, there is good reason to believe that what we have prepared is already serving as a part of reference in various countries throughout the world. I know that for certain. The other thing to keep in mind is that what we did in our country is not going to be directly replicated everywhere else.

What is very key to all of this is that a particular country and its bishops' conference is going to have to get their arms around the issue themselves. They have to see how it is defined in their country, what the resources are, and make the solution their own. They can use this as a point off reference, but really we cannot be used as a boiler plate. The acceptance of responsibility and ownership will be key to any success, so I am not too concerned about the fact that they are not replicating what we are doing and I do not think they necessarily can or should. I think that if they make it their own, that will be very important.

To follow up on Alice's comment about the National Review Board not having any legal or canonical authority, that may be true, but that is not the only authority we have in the church, not the only influence. We have moral suasion, we have their voice. That was very important in 2002 and that is why the National Review Board continues to be an important part of what we are doing.

Rev. J. Cletus Kiley, The Faith and Politics Institute

I just wanted to answer the question about checking in with our bishops' conference. I suspect at a formal approach that has been much more discreet, but I can verify that a number of us who had worked on developing the charter and the various procedures have been consulted by folks from a number of different organizations. Most recently, I met with a representative of the Free Church Association in Germany, who was very interested in what we had done here. I think there is a lot of conversation going on like that, through the back channels where there had been some previous contact.

The other thing I wanted to add about the National Review Board when it was formed and its moral authority, that value could be underestimated in 2002. If the bishops were feeling anything at that moment, it was a severe loss of moral authority. I think that the initial board members, at least what I remember from some of the early meetings, were very aware of that. The accountability piece was a significant part of the charter. The committee, as it was drafting the charter, batted this around a bit, they were not quite sure where to put it. In the end, they thought it best to put with this with the review board, the oversight of the 2 studies on the nature and scope, the causes and context, knowing it was going to open up all sorts of questions. They felt that unless it was in the hands of the review board, the questions might get fudged before we even got the answers. I think that is an important thing at the time, to hold up in terms of accountability.

Geoffrey T. Boisi, Roundtable Investment Partners

Yesterday, we all witnessed a very vivid example of executive leadership taking responsibility through a resignation and relieving of responsibility of a very senior, respected person [the resignation of Army General Stanley A. McChrystal following a controversial interview]. Have there been any voluntary resignations by bishops because of their involvement in this crises, in decisions relating to their executive responsibility?

Bishop Cupich

Aside from the resignation of Boston's Cardinal Bernard Law, I do not believe so. We have seen them now in other countries recently. I think more and more that is going to be on the front burner, and where there may have been wiggle room before, that gap surely has closed. I think it is altogether a new concept in the imagination for a bishop to leave his post simply based on an administrative shortcoming in which he made a decision based on the information he had at the time. I think it is important to keep in mind that many bishops who made terrible decisions did so based upon information they were given by professionals many times and that person could be returned to ministry.

Now that seems incredible in this day and age, that somebody could be returned, but in fact that was the currency in that time period. I think there are many aspects of this that are not

as clear as people would like to make it to be. I think we are now in a position of having information that is very clear to us, and any tolerance for those kinds of mistakes surely has narrowed a great deal.

Jill Braniff, Diocese of Shreveport

Have any dioceses in the US failed audits? What are we doing to provide resources to ensure all dioceses pass their audits?



Jill Braniff

Teresa Kettelkamp

No one has actually failed an entire audit. I think the problem we are having is the record-keeping. I think it goes back to the fact that some dioceses felt that this issue, the audits, would have a shelf life of a couple years and go away, so they did not put the resources they could have, or should have, into their record-tracking systems.

The auditors are pretty black-and-white. If you cannot prove you have trained children, then it does not count, because the bishops are adamant the children will be provided training. It is listed, I think there are maybe 6 diocese which were found to have some compliance issues, mostly in 12 or 13 background evaluations and safe environment program training. If they remedied their compliance issue by the end of the year, we still put it in the report, but noted it was remedied.

Some you just cannot remedy. If an allegation comes in, depending on how it was interpreted, if the auditors felt it should have been notified to law enforcement right away and it wasn't, they put it down as a compliance issue. If it involves a minor, it goes to law enforcement right then and there, we do not even do an in-house investigation. So some cannot be remedied except as an educational perspective.

If the office senses that a diocese is having a problem that needs attention, we offer to go to that diocese, at no cost to the diocese. The charter is about helping those who have been abused and to protect children. The purpose of the audit is not to catch a diocese. It is to hold the bishops accountable so the promises they said they would keep, they can prove they kept them. The numbers are a great piece of evidence to show they have kept their promises.

CELEBRATION OF THE EUCHARIST

Principal Celebrant: Most Rev. Timothy C. Senior, Auxiliary Bishop, Archdiocese of Philadelphia



FROM BISHOP SENIOR'S HOMILY

The Leadership Roundtable is an opportunity to reflect upon the very important aspects of the ministry of the church, most especially, the administration of the church as the church responds to crises with collaborative solutions. To do so effectively, we agree that the response must be marked by transparency, accountability, and collaboration. Now, at the celebration of the Eucharist, we focus on what is most essential, in responding to crises and in all that we do as individuals in our church, that is, the person of Jesus Christ. Proclaiming the Gospel of Jesus Christ, knowing and loving him, is at the heart of who we are and all that we do. In the end, our work for the church must be motivated in and rooted in our relationship with Jesus and must lead us and others into deeper union with him. This is why the church exists and this is, in fact, why God has created us all: to know and to love him so that we might be with him forever in heaven.

2010 LEADERSHIP ROUNDTABLE BEST PRACTICES AWARD



The Leadership Roundtable identifies Catholic organizations and institutions that strive to implement best practices in their management, finances, or human resource development. At the annual meeting, the Leadership Roundtable recognizes examples of such organizations and presents them with the Leadership Roundtable Best Practices Award.



Most Rev. Dale J. Melczek, bishop of Gary, and Ms. Anne Verbeke, program director in the Diocese of Gary, accepted the award honoring the diocesan wide implementation of Catholic Standards for Excellence, which Bishop Melczek called "a valuable tool that provides benchmarks for accountability and transparency."



Ken Hackett, president of CRS, accepted the award on behalf of Catholic Relief Services for their excellence in development and stewardship, honoring their mission to serve the world's poor while upholding strong standards in transparency and accountability.

Video of the awards presentations is available online at TheLeadershipRoundtable.org/2010videos.

PHILANTHROPY AND ACCOUNTABILITY IN THE CATHOLIC CHURCH IN THE UNITED STATES

Introduction

Dr. Francis Butler, President, Foundations and Donors Interested in Catholic Activities (FADICA) and Trustee, National Leadership Roundtable on Church Management

FRANK BUTLER

This morning's session will attempt to engage all of us on the topic of how wealth and accountability all come together in church life. Winston Churchill once said, "We make a living by what we get, but we make a life by what we give." Generous behavior is at the heart of our mission as a church. By it we can measure our programs in living the heart of the Gospel, which is a life of charity.



Frank Butler

For two years in a row, the charitable world has experienced an overall decline. Giving is down about 5% nationally, according to Boston College.

For the foundation world, the world in which I work, last year's giving represented about a 10% decline in grant dollars, which annually totaled around \$40 billion. The decline is showing up everywhere. Contributions to colleges and universities, for example, are down 12%, which would make this, according to the Counsel for Aid to Education, the greatest decline ever recorded for higher education.

Regardless of how much the diminished sense of wealth and security depresses charitable behavior right now, everyone recognizes that we have entered new and uncharted waters for organizations that depend on the generous habits of others. This is especially true for our church. It is feeling the pain in the form of sharply rising operational costs at a time when its donor base is steadily aging. Add to this the continuing bad news from Europe about clergy abuse and you appreciate the fact

that these are especially hard times for the church in fundraising. We also know that, recession or not, church scandals or not, numbers of Catholics as donors are underperforming. Researcher Joe Harris estimates that the Catholic Church's low donor performance costs it about \$2 billion a year; that is the extra amount that would be given if Catholics gave at the average rate for all American faith groups.

This morning's session is about creating the conditions conducive to more generous investment in the church and its mission. This has been the spirit behind the Leadership Roundtable's development and the promotion of its Standards for Excellence program. First, we are going to begin with a pastoral reflection on the clergy abuse crisis and its bearing on church finance, and that will be followed by research perspective on today's donors.

Then a major donor himself will provide some perspective on what he sees as the conditions within the church that encourages larger charitable investments by its people. Finally, we will hear what one archdiocese is doing to promote better management, financial accountability and stewardship.

OPENING REFLECTION

Most Rev. Arthur Serratelli, Bishop of Paterson

On June 29, 1972, the solemnity of Saints Peter and Paul, Pope Paul VI began the tenth year of his pontificate as successor to Saint Peter. He celebrated Mass with a large number of people from all parts of the world and, in his homily, he made a rather shocking statement that has almost become proverbial today. The Holy Father said, "From some fisher, the smoke of Satan has entered the temple of God."



Bishop Arthur Serratelli

In those years following the Second Vatican Council, the high optimism that surrounded the opening of the Council had given way to disquiet, dissent, and dissatisfaction. The old fortress that had been Catholicism had opened the windows only to welcome the winds of discord. The apparent peace that had reigned in Catholicism was now gone. Symptomatic was the new freedoms taken with the liturgy. Once strictly governed by carefully laid out rubrics, the liturgy became, for practical purposes, a laboratory of experimentation. Priests no longer followed liturgical rules, vestments were no longer used, prayers were changed or omitted, Mass was celebrated everywhere from the kitchen table to the beach blanket. This was all symptomatic of a much deeper change in society. Since the 1960s, in all of society, there has been a general breakdown in respect for authority and a greater emphasis on the individual. The church herself was beginning to feel the effects of this.

The Lord had given the church the gift of authority to be used to preserve the unity of believers. The church could not refuse to exercise this gift but she had to learn to use it at a new time in a different way, at a time when strong individualism enthroned individual conscience as supreme and left individuals free to disagree with the magisterium.

We still see some of the lingering effects of these attitudes in public positions taken in terms of Catholic healthcare and by certain Catholic universities in our country. The teaching authority of the church has been weakened and, in recent times, this has only increased because of the perceived betrayal of trust by church authority in dealing with clergy abuse in terms of sex and money.

In the years 2001 and 2002 there was a flood of allegations of reports about priests abusing the young. People, prompted by a somewhat prejudiced media, began to question the bishops' use of authority in dealing with these cases. Recent studies gathered statistics on these allegations from the years 1954 up until 2009. The most recent study published by CARA [Center for Applied Research in the Apostolate] for 2009 shows that although the abuse was reported in 2009, the majority of these cases actually took place between 1969 and 1979. This recent report confirms studies that have already noted that those same years, 1969 to 1979, were the years of the greatest abuse.

Why do I say this? This period in which the greatest number of alleged cases of abuse occurred was the decade immediately following the 1960s. Knowing these statistics makes us realize how profound Pope Paul VI's statement was when he said, right in the middle of those years, "The smoke of Satan has entered the temple of God." That priests sin should surprise no one, but that they should sin in such a way that violates their sacred trust has caused an outrage and a loss of respect for authority.

Scripture helps us to understand how sinful priests have been from the beginning. We hope that is not too optimistic a statement. Even as the priesthood was being established under Moses in the Old Testament, sin reared its ugly head: two newly ordained priests, Nadab and Abihu, on the very first day of their ordination, did not follow the rules set down for worship. They decided to offer incense in a way that was not allowed and immediately, on the spot, they were struck dead. As bad as they were, there are actually two other priests that offer the best example of the worst of priests. They exemplify the crimes committed again and again by sometimes weak and unscrupulous clergy. They are the two sons of Eli who lived at the same time as Samuel. When scripture introduces Samuel, Israel is in a time of crisis. The old tribal ways are falling apart and there is a need for a new kind of leadership, a leadership centered in a king that could gather people together and ward off Israel's enemies. The tribe no longer worked. Samuel therefore becomes the midwife to the birth of the monarchy.

Scripture wishes to heighten our appreciation of Samuel, his noble spirit and unwavering faith. It does so by introducing us to him against the dark background of these two corrupt priests, Hophni and Phineas. They exemplify the religious laxity of all the people at that time, but they are no different from the others, even though they should have been. Hophni and Phineas served at the shrine of Shiloh, where the Arc of the Covenant was kept. Their offenses were not those of small imperfections of character like those quick and dismissive remarks that come in moments of fatigue and preoccupation and that we might easily forgive in an overworked clergy. Rather, their sins were a direct abuse of their authority. These two scoundrels used their priestly positions to take advantage of the very people they were ordained to serve. The first sin was greed. They wanted more than their ministry gave them. They did not like the sacrificial victim that was assigned to them as their pay. In those early days of the judges, before the kingship, the priest threw in his fork

at the moment when the sacrifice was being offered. Whatever he pulled out, that was his stipend; his pay was literally potluck.

They wanted more and they wanted better. They insisted on taking the choice cut before it was offered to God. They wanted the best for themselves, not for the Lord. Their other sin was sexual. They used the women who worked at the sanctuary for their own sexual gratification. It was crude exploitation; they preyed on the very ones who trusted in them.

Now, today, priests who use church funds for their own personal enjoyment, church funds that were given for the Lord, priests who abuse other sexually, especially the young, make themselves lineal descendants of Hophni and Phineas. No doubt the scripture is right about these two scoundrels to put all priests on guard against committing these sins, but scripture writes about them also to teach is the seriousness of their sin.

Nadab and Abihu were swallowed up by the earth on the very day of their ordination. Hophni and Phineas died in battle and their line of priesthood was buried with them. Punishment was sure and certain and, in the first case, swift and immediate. In this way the scriptures are making us aware of how truly heinous their sins were.

That there is outrage, that there is anger, hurt and disappointment today at the sin of some of the clergy is justified. But we are facing something greater than outrage against sin, and here I think we should be somewhat honest.

Let me make it clear: in no way can we dismiss, condone or gloss over the financial misappropriation of some of our priests, nor the sexual abuse on the part of others. But we need to be aware that these are not just Catholic problems. Sexual misconduct is not limited to Catholic priests and certainly the sexual abuse of the young is not solely a Catholic problem.

Let me repeat it again: this does not exonerate a single abuser. But it does open our eyes to a wider question and makes us ask: Why is it that the media relentlessly, continually serve up stories about priestly sins? Why is it that the media repeat the same stories again and again? Why is it that there has been even most recently an attempt to ruin the good name of our Holy Father? And, more importantly, what does this mean for us? What should our response be?

Once the bishops and others were brutally confronted with the allegations that were made ever since 2001, we as a church have responded. In fact, the church was already responding prior to that date. Other countries are now facing the same situation- Ireland, Germany, Italy. They can certainly learn well from the policies and programs now in place in the eparchies and dioceses of the United States.

Our commitment to protect the young, our cooperation with law enforcement agencies, our use of lay review boards, our periodic audit by an outside firm to see that every diocese is in compliance with the charter, and our commitment to transparency, all of these have been a major step forward from those days when, as in the rest of society, these issues were dealt with quietly.

We cannot defend what is wrong; we can only hope to right the injustice and do what we can to prevent it from happening again. There is more to scandal than what is plaguing the church. Is this crisis over? No. But we need to note that the situation is not the same as it was 10 years ago.

There certainly has been a statistical decline in cases from the mid-1980s to the present. Yet the media takes no notice of this and continually paints the church in dark colors. Is there something more at work in the media? I believe there is, and I concur with what former Mayor Ed Koch of New York wrote in a blog post, “Many of those in the media who are pounding the church and the Pope today clearly do it with delight, and some with malice.” Many of the continuing attacks by the media on the church are not ultimately directed against correcting a problem wider than the church’s problem.

So we ask, Why does not the media pursue with the same vigor these failings in other sectors of society, in other faith communities and public school systems, where there has not yet been as frank an open dealing with the issue as there has been in the Catholic Church? Would we be so naïve not to wonder whether these stories have become the ready instrument to discredit the authority of the church itself? The church, with her God-given authority, has spoken consistently, courageously and clearly on certain evils in our society: abortion, artificial contraception, same-sex marriage, and divorce. The church’s voice on these issues is simply not welcome. There are even some within the church who distance themselves from authentic teaching on such moral issues. Could the continual targeting of the Catholic Church be a way to undermine her authority even more and diminish even more her effect on the common good? Even if there were only one priest guilty of sexual misdemeanor it deserves the strongest condemnation, but the horror that Catholics and non-Catholics feel at these crimes is at times exploited as an opportunity to discredit the church as an institution.

Now if we look at those years when the most of the reported cases were said to have occurred, we would be remiss not to note what was taking place in society itself. In the 1950s, Catholics rightly understood the church as a community of believers under the Pope and bishops in historical, unbroken continuity with the church that Jesus founded. They accepted the church as the privileged custodian of divine revelation reaching its fulfillment in Jesus. They recognized that other religions taught the truth about God and morality, but they also recognized the authentic magisterium of the Catholic Church.

In the 1950s the voice of the church was public and was appreciated by non-Catholics. Take one very obvious example: In 1951, Fulton Sheen began his weekly television program, “Life is Worth Living.” The program amounted to nothing more than a teacher, a blackboard, a few invisible angels, and a lecture that translated Catholic truth into understandable terms. When the show began, it faced fierce opposition. In fact, it was not expected to do well in the ratings, opposite the popular comedy of Milton Berle and the mellow tones of Frank Sinatra, but the show did well. It drew as many as 30 million people on a weekly basis and Sheen won an Emmy. The 1950s were different. Priests trained during those pre-Vatican II years were taught a strong respect for authority and a strict moral code of total abstinence. But then came the 1960s and there were three great social movements that characterized those tumultuous years.

First there was the Civil Rights movement. Ever since the late 1870s, the end of reconstruction, the federal government had tacitly allowed race discrimination practiced by some states. Such discrimination was wrong and in the 1960s, the legal authority of the states that allowed such discrimination lost its standing in a society much more attuned to the equality of the races.

Second, during these same years the authority of the federal government also lost some of its luster. The burning of draft cards, the invasion, and the protest against the Vietnam War brought into question the moral authority of a government that was compelling the young to fight in a war that many judged indefensible. State government lessened, authority lessened, federal authority lessened.

Third, the authority of moral imperatives themselves were no longer accepted. From the 1940s to the 1960s, many university students were exposed to cultural relativism. In the waters of cultural relativism there was spawned a lack or a loss of respect for moral restraint.

In studying other cultures, anthropologists such as Ruth Benedict and Margaret Meade had shown there were other peoples with other moral codes, and therefore the moral code that was accepted by everyone in the US was not universally valid and, shortly afterwards, people began to think it did not have any legitimate authority whatsoever. The authority of morality in this country was thrown into question just as the authority of the state and federal government. Thus the 1960s was a period of general breakdown in respect for authority, both political and moral. It was a time when moral rules were ignored and America threw herself into the orgy of the sexual revolution.

Caution and morality were thrown into the wind. Tragically, some priests were swept away by the adverse winds of dissent and unbridled freedom. Did those times at all play into the fact that as statistics show, the period after the 1960s was the same period that there were the highest reported cases of sexual abuse by clergy? The John Jay College of Criminal Justice is in the process of studying and releasing their research on this. It will be interesting to see if my non-professional hunch is borne out by that exhaustive study.

Certainly, that period for the greatest number of abuses coincides with a period when priests and ministers had not been trained as they are today to deal with the psychological and emotional issues surrounding celibacy. Simply the old system of semi-reformation did not adequately equip some to develop beyond adolescence.

Whatever the reason, the fact is the fact. Priests, no matter how low their numbers in regard to other faith communities and the general population, abused the young and misappropriated funds. This scandal is dimming the mission of the church. Catholics belong to their times and some lose their faith in the church, others are embarrassed. What I see as the most pressing challenge for the church today is this: the church being the church. The church must not be afraid to say and live who she is. In no age can the church abandon her mission because of the sin of some of her leaders. Rather, the church needs to be faithful to her mission as sacrament and sign of salvation. She cannot be forced or should not be forced into silence and made to flee the public forum.

From the beginning of the church, her message has always been the word of Christ. Repent, and believe the good news. She addresses those words not only to the outsider but to those within the faith community. She addresses those words to herself. *Ecclesia semper reformanda*. Those who sin in the church need to repent; but that is only half of the story.

All of us need to believe in the Good News. The church has something positive, something good, something transforming to offer our times. In an interview given with a German journalist in the summer of 2006, Pope Benedict sounded a refreshing note about the vision of the church to make a difference in our world. He said, "Catholicism is not a collection of prohibitions. It is a positive option. We have heard so much about what is not allowed. Now it is time to say we have something positive to give." Our culture certainly no longer supports our values. It attacks and undermines them. Each day the church faces a secularistic, materialistic environment. Today's culture attitudes even erode Catholic practice and Catholic identity.

What is needed for all of us is a clear identity of the mystery of the church, the validity of her mission, and a clear understanding of who we are. Like Paul, who went straight to the center of intellectual life of his day, the church is called to be involved in the areopagus of our day. We should not shun signs, philosophy, medicine, and arts and the media. There the church should be with her enriching truth.

One last question: How is this all to be achieved? Well, two great Popes of modern times, Paul VI and John Paul II, have given us a way to achieve this. They called for the re-launching of evangelization, for a new evangelization. What is it? The basic task. Jesus sends out his disciples. It's the proclamation of the Good News. And in response to the challenges that we face, challenges such as a hostile environment, the Popes see this as the answer. In simplest terms, evangelization means making the world aware, by word and witness, that salvation is through Jesus Christ. Jesus saves from all sin. We cannot lose sight of this. The vital core of the new evangelization must be first the proclamation as Jesus as savior and, secondly, the teaching of the church's place in the mission of Jesus.

The church offers a truth that is wider than an idea. She leads us to find God. Not just any god, but the God who reveals himself in Jesus. Here is the work of the new evangelization: to move beyond the sins and the outrage, to make God visible, and to bring others to encounter him in the church. The church is not incidental to God's plan. Jesus sent out the disciples and remained committed to them and their work. He chose the 12 to be his constant companions, he sent them to preach, he appointed a further 72 and he said, "Whoever listens to you listens to me." As he promised at the Last Supper, he has already sent the Holy Spirit to form the church. As Saint Augustine says, there is no other mystery of God except Christ and the church is his mystical body. Since Christ and his body are one, the church is necessary for salvation, and I feel that is a truth that most Catholics have shied away from in most recent times.

We need to return to this deeper understanding of the church as one, holy, catholic, and apostolic. We need to understand that this community, made up of saints and sinners, is, as Augustine says, progressing on her pilgrimage amid the persecutions of the world and God's consolation.

Christ said that the gates of hell would never prevail against the church. Implicit in that promise is also the warning that we would face evil. In 1779 a French newspaper reported that a certain man named John Angelo Braschi died in prison. Does that ring a bell with anyone? No? It did not in those days either; most people did not recognize that was actually the obituary notice for Pope Pius XI, who had occupied the chair of Peter for 25 years. Napoleon had captured him and had imprisoned him in the citadel of Valence where he died on August 29, 1779. When he died, many in those days said that there ended the Catholic Church. That was 200 years ago and we are still here. The Lord is faithful to his promise: Behold, I am always with you, even to the end of time.

Christ once spoke of the church of the vine and the branches; how appropriate for our day. Not all branches bear good fruit and so they need to be pruned. The pruning is merely the preliminary to bearing more fruit and in abundance. Perhaps the pruning that the church is now facing as she owns up to the sins of some of her clergy and finds more adequate ways to deal with them, perhaps this pruning is in God's providence, the pruning necessary for new growth and more abundant fruit through the new evangelization.

Plenary discussion highlights

Frank Butler

If the notion of authority has changed so drastically within Catholicism, within society itself, as a pastor now, how do you achieve your leadership with a new understanding of authority? How do you go about this?

Bishop Serratelli

Recently at the bishops retreat, one bishop asked, "What difference have you noticed in the way the church has worked with authority?" Another answered, "Before Vatican II, I could have changed a priest with a 22-cent stamp." I think this is a good example of how authority has changed. It's much more collaborative today; decisions are made with many, many people. I think that has added a certain ability for the church to grow and expand.

James Dubik, US Army (Ret.)

In an age now where information is much more readily available and alternative explanations are easily accessible, how might we act as a community to reestablish our corporate responsibility for explanations?

Bishop Serratelli

The groundwork has to be done in a very strong catechetical formation. I think this is basically where we fail, 40 years after the Vatican Council, where the laity really should be the spokespeople for the church

In the Diocese of Paterson, we are opening a Catholic center for evangelization, and one of the things we are trying to do is hosting evenings for professionals to talk about ethics and responsibilities in their professions. Once we begin exposing individuals to the wisdom of the church, I think the message will get out. I am not so sure we could have a single person do it alone today, which may have been possible in Archbishop Sheen's time.



Britney Janis

Britney Janis

Recent polls and studies seem to indicate that the church is not successfully demonstrating the relevance of faith to contemporary culture. People are not seeing the connection to their everyday life in faith.

Bishop Serratelli

Certainly the homily is one way, but people are not there to hear it. I think we must try to reach people outside the normal channels. We need to train certain charismatic individuals in the community, both priests and lay people, to be evangelists, to go to those places where they can meet the young. At the Center in Paterson, we have young people coming from all over because they are finding a way to talk about their problems with their peers and have someone there to explain things with them. The hope will be that they will then be welcomed back into the church. We have to think outside the parish lines, to look and spend time and energy in preparing individuals to do that kind of work. We have not done that yet.

THE MORAL BIOGRAPHY OF WEALTH AND THE NEW PHYSICS OF PHILANTHROPY

Dr. Paul Schervish, Center on Wealth and Philanthropy, Boston College

What I hope to do today is to provide a framework for the administrative innovations and the organizational developments that you are hoping to introduce and sustain in the church. I look at some of the things Aristotle said and try to apply them to our life. Once Aristotle suggested that each one of us take what our immediate purpose is and see in what way it is a means to another deeper purpose. I think that in the end, all of your work and all of my work is addressing the question of people's experience of God.



Paul Schervish

I want to talk about this in the context of a financial ministry, a financial spirituality, a spirituality of wealth. I am going to tell a little story about an old couple that lives in the forest. One evening a knock comes at the door, and the person says, "Do you have some food and water for a wayfarer?" The old couple says generously, "We have soup and we can add a little water and share it with you." When the dinner is over, they save what is left over. The next night another wayfarer comes and says, "Do you have something to provide a hungry wayfarer and some shelter." The old couple says, "Yes, we do. We can add a little water to the soup." This procedure goes on and on and they are eventually, as you all understand, serving the soup of the soup, which is water. I think that is an analogy of what is going on in our church today in many ways: very generous people are attempting to provide nourishment to very hungry and thirsty people who are looking for nourishment. But we are serving, in many cases, with generosity and with care, water. We are accepting water as our nourishment because we are so hungry and thirsty.

A new era has commenced in the level of wealth in the US and across the world. Never before have so many individuals at such an early age had the time, energy, and potential interests to direct great wealth to address great material, cultural, and spiritual needs.

The question for all of us is, how do we enrich the soup? I think one arena in which we need to enrich the soup is the arena of wealth and spiritual life. A new era has commenced in the level of wealth in the US and across the world. Never before have so many individuals at such an early age had the time, energy, and potential interests to direct great wealth to address great material, cultural, and spiritual needs.

For this wealth to be directed toward deeper purposes, people need to discern not just their level of financial wherewithal, but their attraction to and responsibility for allocating their wealth. In addition, they require the spiritual strength to carry out their choices in the search for greater happiness which I operationalize as this combination of effectiveness and significance. This greater happiness is for one's self and for others simultaneously.

The distinctive trait of wealth holders, in all generations, is that they enjoy the fullest range of choice in determining and fulfilling who they want to become and what they want to do for themselves, their families, and the world around them. Today, increasing numbers of individuals are approaching, achieving, or even exceeding their financial goals with respect to the provision for their material needs. They are doing so at a younger and younger age. A level of affluence that heretofore was simply the province of rulers, generals, merchants, financiers, and industrialists has come to characterize a whole group of people in our world and, indeed, whole sections of society. For the first time in history, the question of how to align broad material capacity of choice with spiritual capacity of character has been placed before so many people of the world.

For the first time in history, we possess the confluence of immediate knowledge of human needs, the material resources to solve, and not just ameliorate, those needs, and the conference and organizational capacity to implement solutions. But the greatest need is to animate in a contemporary way the spiritual desire and will of generosity by which people will allocate their wealth for the benefit of humanity. I think that one of the leading questions of the 21st century is how individuals will allocate their wealth as a tool for deeper purposes. A tool for deeper purposes when acquiring more wealth or a higher standard of living is no longer of high importance.

I want to broaden this perspective a bit and talk about what is the nature of a wealth holder. This has to do with the notion of moral biography. Moral biography is this link between capacity, which is latent until put into practice by an aspiration or a purpose. Let us look at capacity, by which I mean choice and freedom. When we talk to wealth holders they virtually always explain that the meaning of wealth is having the great capacity of freedom of choice. Another aspect of this would be skills. It would be good looks. It would be charismatic personality. It can be intellect. It can be any of the capacities, including wealth. All this is latent until put into practice, as I said, by purpose, moral compass, values, objectives, and so on. When this is implemented, we find this to be a moral biography. Now there are many examples of moral biographies that we all know, but this is described in the great epics. It is the story of Moses. It is the story of Jesus.

You see in both cases they are combining miraculous and great power with a purpose that very often is associated with a geographical movement and not just a psychological or spiritual deepening. This moral biography shows up very commonly in our comic book characters, Luke Skywalker,

Superman, Sheena of the Jungle. What we find out in each one of these cases is that there is a set of episodes of moral biography, an episode where there is deepening, a learning, in which capacity sometimes outstrips aspiration or purpose. Then the person, like Luke Skywalker, gets himself and everyone else in trouble. Or purpose outstrips capacity and, once again, Luke Skywalker, or Moses, gets themselves and everybody else in trouble.

Given this, I want to talk more specifically about the moral biography of wealth. What is distinctive, as I said, is this realm of choice. The moral biography of wealth revolves around this notion of what I call hyper-agency. The hyper-agent is an agent, and an agent does or acts. To make it kind of immediate, let me simply say that a hyper-agent is able to do single-handedly what it takes a social movement, a political movement, or a philanthropic movement of many people to do otherwise.

Most of us are living our lives attempting to find our place that is best, to find our vocation in the world. Hyper-agents have the privilege and the dangerous responsibility at times of not just finding their place but being founders, founders of institutions or organizations, founders of new directions of thoughts or cultural trends. Of course, wealth holders are not the only hyper-agents. Mother Theresa was one of course and many of you are hyper-agents in your own realms. But hyper-agency comes with this power of electricity or fire where it can be very destructive or very potentially caring.

Given this, let me talk first about the moral biography of capacity among wealth holders. Wealth reached its peak in the United States in the year 2007 and has declined about 24% since then. Since the end of 2009 through the first quarters of 2010, wealth has begun to increase again about a 10% rate per quarter. We expect that not only will this growth transfer occur, but that it is going to occur at a level greater than what we have mentioned. Our prediction included only a 2% annual rate of growth in wealth. In fact, since 1950, the real annual rate of growth in wealth has been greater than 3%, including 10 recessions and the one that we are in now. So our 3% estimate is probably more likely to occur and that is closer to \$92 trillion.

Even then, we are finding that what is being transferred to heirs is greater than what we predicted would be transferred to heirs, charity, and taxes. There is this abundance there despite what we have found in the past few years, the shaking of the sense of financial security. That is an important point because, in our research, we have found that one of the most important predictors of charitable giving across the economic spectrum, from low income to the very wealthy, is how financially secure people feel.

Just at the upper end, our research has shown that for each group that increases its self-reported sense of financial security, charitable giving is greater, both as percentage of income, percentage of wealth and therefore an amount, controlling for each category of income and wealth. Among regular people, the bottom 95% of the population, our research has also shown that not talking about wealth, because that is not in the data, but that income, confidence about the family's future income success, leads to higher charitable giving in each income group. I mention this because what we are finding today, that when the security is shaken up so much more depends upon our inner character and our inner spirituality. We have in our research taken up this issue by address-

ing what is the meaning, what is the motivation, what is the inner life of philanthropy. I want to say that in our point of view, what is a very Catholic and Ignatian point of view, that it does not really matter when we distinguish between formal philanthropy and informal or personal care with our resources for our families and our friends.

Not counted among any of the formal philanthropy in the nation is \$100 billion a year in remittance by immigrants, mainly, to their families and close friends in their home country. In addition, despite the downturn in philanthropy of \$25 billion worth of annual giving, no corporate or foundation giving is counted.

We find that there is a great inner life of generosity of people. This is what I want to talk about as this issue in Aristotle and in many of the ancient writers. This notion of “*philia*,” philanthropy as the love of humanity. For Aristotle, *philia* is a certain kind of love: mutual nourishment. We want to understand that people are in this mutual nourishment from the time that they are parents or children. It is this core experience of nourishing people as if they were yourself. Aristotle says, “A friend is another myself.”

Instead of looking at what is altruism in the modern sense, or what is selfishness, our research has indicated that neither of those two notions capture the meaning of this personal care that gets expressed formally in philanthropy at times. Rather, instead of the absence of self, we can talk about the quality of self. The quality of self that most matters in the mutual nourishment is the quality of identification with the fate of others as if they were myself, my parents, my children. So that is the major motivation, mobilizing factor in care for others. If identification is the school of care, the school of identification is contact. They say thank your donors seven times. I point out that we need to show our donors their connection seven times.

In addition to talking about the notion of *philia*, let me just mention what this Jesuit teacher of mine, Jules Toner, taught us about care. He says, “Care is love implemented.” What is care implemented? It is meeting the true needs of others. You can always argue what true needs are.

Let me see if I can talk about a positive definition of philanthropy, both in its very personal sense and in its more institutional sense. To do that, I want to have you recall Jean Valjean and the play, *Les Misérables*. In *Les Mis*, we find that Jean Valjean has a family and he has stolen bread for the care of his sisters and his niece, and he is jailed. As the show goes on, we hear that Fantine comes to Jean Valjean and says, “Will you care for my daughter, Cosette?” And he says, “This day she will be in my house.” You notice he does not just take care of Cosette, he cares for himself. He becomes a father. He becomes connected to a family which he had lost at the beginning of the story.

I want to point out that he was an industrialist and mayor. So on the other hand, he could have handled this situation by starting a government institution, an orphanage. He could have handled it by hiring Cosette at a greater wage than she was receiving from the Thenardiens, the bawdy family for whom she was working as a bar maid. But instead he brought her into his home.

The key to this, as you notice, is that Jean Valjean, if I came to interview him or the government came to interview him or any research group came to interview him about his philanthropy, he would have to say zero. Jesus would have to say zero. Moses would have to say zero. My mom and dad would probably have to say virtually zero. But there was an abundance of philia.

My positive definition of philanthropy that gets us beyond the notion of a non-profit sector, non-governmental sector, this third sector, for which we do not have a good, positive definition.

Philia, whether you are taking care of your babies, whether you are taking care of your parents, whether you are contributing large amounts for the education of inner city children, whatever you are doing, you are paying attention directly to the person in need. And isn't that a great privilege? What is one of the greatest experiences you have ever had in your life? It is simply being able to meet the needs of those with whom you identify as another myself, and what a great privilege that is for all of us, not just the wealth holders.

Let me conclude by making a call in some ways for a new pastoral encyclical from ourselves as lay people, from ourselves as bishops and priests and sisters, from ourselves as the church together. We need to write a new spirituality of wealth. The churches today for the most part understand a feudal spirituality, one of zero sum growth in wealth. Wealth is gained because somebody else is destroyed. We have this notion that what we ought to do with our wealth is distribute it. We do not have a spirituality of the productive activity of wealth and growth in wealth. There are people who understand this, even though we do not hear it often from our pulpits. The people who understand this are very often financial advisors, fundraisers, spiritual teachers who talk with wealth holders.

For the people going through this themselves, with their hearts, their families, their children, are the ones who are creating an emerging language, experience of the intersection of wealth and the experience of God. We need to learn that more in our church. When we were a young church in the United States, we had a spirituality of survival, and then we had a spirituality of immigration, then a spirituality of moving from poverty to social mobility. What we have not had yet is a solid emerging voice of the people, experience of what it is to find God in a life of financial wherewithal. Of course this applies not only to the very wealthy, but to those who are highly affluent and have dramatic range of choice compared to what our parents had.

In this encyclical I would call upon us to go further than Benedict has gone in his encyclicals on love. In that encyclical he talks about love as eros, hoping to revitalize its sense in a deeper way: an agape. He makes a reference to philia and says, "I am not going to speak about that because the only place it comes up in the gospels or in the letters is in John's Gospel." It comes up in John's Gospel in the section where Jesus is talking to his disciples and says, "I no longer consider you my servants but my friends." Philia. It comes up again at the end of John's Gospel in that famous question of Jesus to Peter: "Do you love me?"

I am calling for an encyclical on philia. That root word of friendship love for all of this philanthropy that even Vatican II did not address. There is only one reference in *Gaudium et Spes* to *caritas* as giving of resources. Every other time it is referred to as this attitude of love. And *Gaudium et Spes*

begins by saying, “The hopes and joys, the fears and anxieties of the people of God are the joys and hopes, the fears and anxieties of the church.” The realm that we have not addressed and need to do more in is the fears and anxieties, the joys and hopes around the spirituality, the spiritual life of wealth.

Plenary discussion highlights

Frank Butler

You made a very persuasive case for a new spirituality of wealth. I think your encyclical letter would help give us a great framework. Is the problem of underperformance of the Catholic rank-and-file in the area of donations attributable to that lack of connection, the lack of understanding the church as family?

Paul Schervish

Yes, it is due to that and its broader sense. In our research we have found that there are two areas of the United States in which secular giving outstrips religious giving for individuals: the Northeast and the Northwest. In both of those areas there is a large number of unchurched professionals, unchurched former Catholic professionals. So that is one dimension of it, an alienation of professionals, especially the academic professionals, or those that are never involved in religion are largely among the high-tech wealth holders.

Another thing, of course, is the alienation experienced by some from such things as the encyclical *humane vitae*, the sex abuse scandal, and even the notion of free ridership. If you belong to a big parish, the ability for a large number of people to provide small amounts of money individually enable the church to continue to survive, perhaps preventing larger gifts.

I think that is important to understand that there is not simply this authority issue; it is a nourishment issue. I think Catholics are those that have most experienced the loss of this nourishment.

A BLUEPRINT FOR GENEROSITY

Mr. Jack Connors, Jr.

One of the great strengths of America, obviously, is its entrepreneurial spirit. It doesn't have a dialect that's unique to one region of the country or another. And some Americans would argue that startups are a great source of new jobs, new hope and new opportunities for Americans. I'm an entrepreneur. I built and sold two businesses. The first was in the world of advertising and the second was in medical education.

The Catholic Church was a startup some 2,000 years ago. And within our faith we have seen the success of many entrepreneurial efforts: the Jesuits, the Benedictines, the Carmelites, the Sisters of Notre Dame, the Sisters of St. Joseph, and many more.



Jack Connors

Some argue that our faith no longer embraces startups. What I will talk about this morning is not a startup. Or, if it's easier, we will call it new and improved. As I mentioned I came from the world of marketing and advertising. And in that world, one of the most successful companies is Proctor and Gamble. And one of their more successful products is Tide.

For those few of you who might not know, Tide cleans clothes. When it was first introduced in 1943, the advertising claimed that it cleaned clothes. In the 67 years since its introduction, Proctor and Gamble has chosen to say that Tide is new and improved approximately 50 times. By the way, it still only cleans clothes. It doesn't make your bed. It doesn't prepare your meals. Tide still only cleans your clothes.

So I'll let you be the judge of whether what we're talking about is new or new and improved. What we're really doing is introducing a model that's kind of new and improved over an old model that was proven to many of us to be the best possible preparation for life, Catholic education.

So it's with that same optimism I want share a story with you this morning about a model that truly is new and improved. In the Archdiocese of Boston, one of America's oldest cities, two-thirds of the Catholic schools are located where one-third of the Catholics reside in our older cities, in places such as Boston, Dorchester, Lawrence, Lowell, and Brockton. As the immigrant population enjoyed some degree of wealth and left for the suburbs, the churches went to the suburbs but they didn't always build a school on a one-for-one basis as they had done in the city.

Before I get into the specifics of our project, I would like to just set the stage by sharing a little bit of data. In 1965 there were 5.5 million boys and girls and 13,500 Catholic schools in America. Today, just 45 years later, which is not long in a 2,000-year-old tradition, there only are 2.1 million boys and girls and 7,000 schools.

In the Archdiocese of Boston, the numbers are almost more dramatic. In 1965 there were 250 parish schools with 150,000 children. Today there are 90 schools with 50,000 children. Obviously this is not a growth industry. If it were a stock, you'd want sell it. If it were a company, you'd have to close it. But it is neither a store nor a company. It is the seed crop of our faith.

The Catholic Church is providing the second largest K-8 education system in America, just after the national public school system. Across the American Catholic school system, and I'm using the term system loosely, the primary source of revenue is tuition, but tuition doesn't begin to cover the costs. In fact, it covers about half the costs. Beyond tuition, the next biggest source of revenue varies between cake sales, car washes, and bingo nights.

About four years ago, Cardinal Sean O'Malley asked a group of us to develop a strategic plan for the future of the archdiocesan parish schools. We learned several interesting things. The system was essentially broken. Most of the surviving schools were barely keeping their heads above water. Morale was through the floor. The nuns are long gone, but there are still teachers, mostly women, work for an average of \$30,000 a year. These teachers are for the most part very good at what they do and, in our opinion, have become the new missionaries. The difference being that they take no vows except perhaps the vow of poverty given their salaries. They wear no habits. The schools themselves are the old brick buildings that you can imagine in some of the early cities. They're on average 100 years old. And those buildings really have good bones. But for the most part they were held together by duct tape and bailing wire. You may be interested to know, this is a fact the most of you perhaps are not aware of, that Catholic schools are the largest purchaser of duct tape in America. I know this is true because I've seen it for myself in the boilers rooms of at least 25 schools!

We decided that there was only way one to handle it: full immersion. This is based on the obvious premise that if you were to paint a '57 Chevy candy apple red, it would certainly look beautiful but it would remain a '57 Chevy. In a recent article in the New York Times, Diane Ravitch, one of America's foremost authorities on schools, was quoted in her book, *The Death and Life of the Great American School System*, "Where charter schools are expanding, Catholic schools are dying. But charter schools can't do the same thing. The Catholic schools have a well established record of being effective and they are being replaced by schools that have no track record."

Joseph Viteritti, a professor of public policy at Hunter College who has edited four of Ms. Ravitch's books, said, "If you are serious about educational reform, you have to pay attention to what Catholics schools are doing. The fact of the matter is that they have been educating urban kids better than they are being educated elsewhere."

So we have a dichotomy. We have the best product and we have very little financial support. It costs approximately \$20,000 a year to educate a student in the public schools across the land versus \$6,000 in a Catholic school. Our track is not only more efficient, but we have the added value of teaching the kids moral values and faith formation. By the way, statistics also demonstrate that more of our kids will go to college than public school kids.

I am here today as a spokesman for our team, men and women who have come together to become fully immersed in this project. Some have been critical of leaders of our faith, but all of us agree that the best way to fix our church is from within. The story I'm telling this morning is nothing more than a story about modern day Good Samaritans. It's not big deal, really. It's what we should be doing. And, by the way, it is working and it is changing the lives of thousands of kids and their families.

These children, by the way, are not Irish and Italian as the kids were when I went to Catholic school. They are the children of the new immigrants and their parents have exactly the same aspirations for their children as your parents had for you. We believe that by rebuilding our Catholic schools, we can improve lives, improve communities, and help secure the future of our faith.

Nick's epiphany was this: What will we build? Have we become a generation of people who just use things? And are we a generation of people who have lost the fire and the passion for raising money?

Father Nicholas Sanella invited me to see his new parish, Immaculate Conception in Lowell, Massachusetts. So I made the drive from Boston to Lowell and he met me at the front door of the rectory. As we went through the rectory he reminded me, that his is a church in transition. There are 26 bedrooms in the rectory, to give you an idea how big the parish is. Twenty-six bedrooms in the rectory and he's the only priest in residence. The good news there is he could stay in a different room virtually every night of the month!

We went into the church, and Fr. Nick opened his great arms wide, right in the nave of the church and he said, "Jack, this is my parish." And there was a little bit of an epiphany. I went back with him 100 years, just after the great stone masons, the carpenters and the folks who prepared the stained glass windows. After they finished the beautiful new Cathedral of Merrimack Valley, Immaculate Conception Church, the bishop probably held a mass in celebration. I imagine it was to thank all of the laborers, most of them immigrants, for the work that they had done. Nick's epiphany was this: What will we build? Have we become a generation of people who just use things? And are we a generation of people who have lost the fire and the passion for raising money? Because parishes really don't have enough resources to run the schools anymore, we now create regional models.

We asked the former head of Brockton, MA, public schools to lead the academic rebuilding of our Catholic schools. We asked the CEO of Suffolk Construction, John Fish, to manage the complete restoration, to tear out the boiler rooms, remove the chipped asbestos tiles, replace every window, install air conditioning and refresh the faculty. The wonderful woman who is the president of our organization and leads this effort for us is Kathleen Driscoll.

Today we have two schools that are virtually brand new, each of them at a cost of approximately \$8 million. You've all heard the expression, "If you build it, they will come." Today in Brockton there are 545 students in our Catholic school; when we started with three schools each had just 100 students. And now there are 545 boys and girls in our two schools. There is a waiting list. There is as program for gifted students. There is a glee club and a band. There are sports teams. But mostly there is great joy.

On the strength of that success, we were invited to Dorchester, Massachusetts, where we replicated the model. The schools are no longer parish schools. They are regional schools with regional governments. The church owns everything and has absolute control over the teaching of religion. We take care of everything else. We now have four brand new schools, two in Brockton, two in Dorchester, and hope to begin construction of a fifth within the next 12 months.

And now there are 545 boys and girls in our two schools. There is a waiting list. There is as program for gifted students. There is a glee club and a band. There are sports teams. But mostly there is great joy.

As I previously mentioned, tuition doesn't cover any of these schools expenses. Each school loses \$400,000 to \$500,000 a year. That's all built into our giving plan. In the past four years we've raised over \$50 million and we've learned something there as well. Our faith has many strengths, but fundraising is not typically one of them.

So four of us agreed to a startup, a development team, to create a development team. And we hired some of the best professionals, paying the leader \$250,000 plus benefits. Soon that startup will be self sufficient, but we couldn't afford the ramp up time. So you may say we jump-started it with a \$2 million investment and half a million dollars a year until it was well on its way.

Now some of you are old enough to remember the eighty-twenty rule. Eighty-percent of the money came from twenty-percent of the donors. Forget that rule. In philanthropy there's a new rule. And the new rule is ninety-one. One-percent of the donors give ninety-percent of the money. And the new rule is go where the money is. Go speak to the wealthy.

We have created a safe, nurturing environment for approximately 3,000 children. And, by the way, our local colleges have been most helpful. We've rebuilt the plants, established new governance, improved the curriculum and the technology and improved the faculty compensation. When I was a young man I wanted to change the world. Now at the age of 68, I take great joy in being a part of a team that make pieces of the world better.

This model works, but there's no pride of authorship. It needs to be replicated on a much grander scale. And for you old timers like myself around this room today who think maybe we're too old to engage in the battle, I offer for your consideration the words of the great Scottish poet Robert Burns who said, "I've fought all my life. Why not one more fight?"

Plenary discussion highlights

Mark Moglika, Diocese of Green Bay

What was the impact on the local parishes, the faith communities, in terms of their generosity? Was there any kind of residual impact in terms of mass attendance?



Mark Moglika

Jack Connors, Jr.

The parents had been walking away. And now they're walking back. And they have become part of the governance structure. They're on the boards of each of these systems. In addition to clergy, we have local business people involved, as well as the parents.

In the 40s and 50s, up through the 80s, I'm not sure that any Catholic school had any sense of why they would use a database. So if you go to a school and you ask, "Any sense of who went here and maybe moved to Wellesley or Hingham and had some success?" they have absolutely no idea.

So the way we had to do it was anecdotally. We went to a lot of breakfasts, had a lot of coffee and tea, and the occasional cold beer. In some areas, a glass of wine with a little brie on the side. And we began asking, "Do you remember who went to the school with you?" People would sit for hours and tell us, "Well, you ought to look at this guy and you ought to look at that person." And I can tell you some great stories. Some hilarious stories of meeting with leads that people had provided to see if we could generate some interest. It didn't happen initially, but over time, once people found out how real it was, we had a true ground swell and found lots of people who wanted to come on board and contribute.

And most of the contributors, did not want to talk about the governance. They trust the leadership. They just want to contribute and be part of it. I can't speak to church attendance, but I can say that this is bringing people back home. And that's very encouraging and very helpful to us.

Rev. William Byron, SJ, Saint Joseph's University

I look admirably at what Boston College has done for the greater Boston area, but I don't know how we can put together that kind of resource in other places. How can we mobilize the right people? Regrettably, the archdiocese is not the magnet. So we need to discover something new. Do you have any ideas?

Jack Connors

Yes. Did I tell you about Tide being new and improved for 67 years? I think that it's disarmingly simple. It just takes time. It takes a lot of time. It's a very inefficient beginning. But if I may say so, you need to find me. And you need to find successful women and men. And you need to encourage them to start something. To be entrepreneurs. Encourage them to go fix this one school. If you ask somebody to fix 50 schools, they can't do it. It's overwhelming. But if they fix one, the desire to contribute spreads.

A BLUEPRINT FOR ACCOUNTABILITY

Mr. John Kaneb, Chair and CEO, HP Hood, LLC

Ladies and gentlemen, I am so pleased to be in the City of Brotherly Love. Someone here has entitled my talk, “Paths to Accountability.” And I think I should start out by telling you about my concept of accountability in the context of a lay person trying to serve his church.

I’ll try to relate this to you in my role as a very long time member of the finance council of the Archdiocese of Boston. Cardinal Bernard Law appointed me as a member of his first finance council in 1984, a post I still serve.



John Kaneb

I’m not here to regale you with facts and figures about the Archdiocese of Boston, but I am here to talk to you about how I tried help the church in its business life with my colleagues on the finance council. I have served on boards and committees of universities and hospitals affiliated with the Catholic Church.

I hope that the priests and bishops of our church will be great pastors.

I believe that the people who manage these noble institutions are often not well equipped by ability or training to manage their organizations according to sound business principles. In fact, especially in our church, they may have little understanding of the concept and execution of good business practices. I see this as a good tradeoff. Short of having universal men and women leading our church who have expertise in all fields, Da Vinci or somebody like that, I hope that the priests and bishops of our church will be great pastors.

I will observe that good business practice is still essential, even if we have great pastors who don't have much interest or capability in good business practice. And that's where lay people come in. Sharing of information offers great benefits to many organizations, but it does not come easily. In fact, there is still a culture of holding information very closely that has existed for a long time, and I'm afraid still exists, even in the church.

In spite of that, Geoff Boisi and others had the vision and courage to found the Leadership Roundtable. And if I had to name the single most important virtue for a lay Catholic who wants to enable his church to achieve and maintain financial health, that virtue would be persistence.

Many days you accomplish nothing. Other days you lose ground. I am the first to admit that the path to early success, as opposed to delayed success, depends to a large degree on the bishop's personality and willingness to listen to lay financial advice. All bishops in the United States, as far as I know, or all ordained, as I should say, are required to maintain a finance council. At one extreme, we have bishops who use the finance council happily and productively for themselves and their chief financial officers. At the other extreme we have bishops who tolerate their finance councils and who seek their advice seldom and their approval only when required by canon law. Cardinal Sean O'Malley is a superb example of the first.

FINANCE COUNCIL CHARTERS

I believe that Boston's charter is a model charter. And for that happy circumstance we are in debt to the Archdiocese of Milwaukee, whose charter we emulated. Joe Finn, who is sitting here today, and who many of you know, urged us to create such a charter, and Cardinal O'Malley encouraged us as well. I believe that even in difficult situations the process of conceiving, drafting and getting a charter adopted can be very useful.

A charter for a finance council is very much regarded as good practice. For those of you who may be interested in serving your bishop, from a business point of view, if you don't have a charter, agitate for one. If you've got a meaningless charter that can be written easily on one page, agitate for a comprehensive one.

I suggest to you that it can be a tool for moving lay leadership into a place where bishops don't just tolerate finance councils, but use them and listen to them.



Joseph Finn

Plenary discussion highlights

Rev. Edward A. Malloy, CSC, Notre Dame University

I want to ask, since you've worked in multiple realms in the church, whether you believe what some people have said, that church institutions that are education-related and health-related have come much closer to replicating practices that have prevailed in the business world than has been true in dioceses and parishes. If that claim is accurate, what do you think that dioceses could learn from other Catholic institutions?

John Kaneb

I certainly agree with the observation you have made that in general universities and hospitals are in most cases far ahead of Catholic dioceses. To answer the question in response to the way you've asked it, that just sharing needed information with people that you're asking to serve, lay leaders, is the first step. It can be very hard to give sage advice to bishops who don't give you very much information or, in some cases frankly, withhold important information.

Frank Butler

I'd like to ask you a question about just the whole governance model of the client and the decentralized notion of it, the idea that parishes are sort of semi-autonomous in so many ways, especially on their finances. Is that a hindrance in this day and age?

John Kaneb

There are disadvantages to having a center that can tax heavily to deploy resources elsewhere when in fact the people being taxed have little to say about where the money's going. And it's going back to the founding of our republic. I think the American model and the Catholic Church model are very different and here we here Americans who are Catholics and we live all the time with the reconciliation of two approaches to how to run things. And it makes it interesting.

Rev. William Byron, SJ, Saint Joseph's University

Do you have a position on the requirement of an external audit for individual parishes?

John Kaneb

I don't feel that it is essential if the diocese itself has access, and takes advantage of that access, to any given parish's, or all of its parishes', financial operations. We are honing our skills in Boston at that matter and gathering data. Certainly it could be desirable, but I don't think is necessary. As long as you have the right information gathering at the diocesan level.

Closing Remarks

Lt. Gen. (Ret.) James Dubik, US Army, and Mr. Geoffrey T. Boisi, Chairman, National Leadership Roundtable on Church Management

Jim Dubik

Let me begin this summary of our deliberations with a story from earlier in my career. In 1974 the United States army decided to shift its approach to training from a personality-based model where each commanding general, usually a two star, would dictate the type of training that commanders would do, and the performance levels that were acceptable.

Each commanding unit was operated like a little fiefdom. When you left the 82nd airborne division, as I did, and moved to the first cavalry division, you just forget what they did in the 82nd, because that was obviously not correct; you're here now in the first cavalry division. Then you moved to the 101st airborne division, and you forgot everything else you had learned, because when you get to be a screaming eagle, that's the best possible place to be. There were all these little fiefdoms as you moved around the Army.

Toward the end of the Vietnam War, the Army decided that we would not operate like that anymore. We would now be a performance-based organization. We published task conditions and standards, standards for excellence, for soldiers, leaders and units. And from the period of 1979, when we finally published them, through 1986, it transformed the Army. In that period, the Army catapulted from the bottom of the heap in terms of public perception of institutions, to the top, and it has been satisfactorily performing ever since.

This transformation did not happen without some angst among leaders. As a matter of fact, there was a lot of angst among leaders because it created much transparency and accountability. It was no longer the personality of the commander decided. You either performed, or you didn't.



Jim Dubik

And that was very threatening to many leaders, because now the senior leaders, lieutenant colonels and higher, were being held to a standard of performance. And it was very obvious whether they performed or not. There have been painful reminders of this ethos and its consequences in the last few days. My good friend, Gen. Stanley McChrystal, and before him another good friend, Gen. David McKiernan, both four star generals, were held accountable for what they failed to do. But those are just visible guys. I've had the unfortunate duty twice as a three star general to relieve commanders for lack of performance.

This transformation is not without pain. There's no doubt about it. But the overall transformation of the Army, your Army, has been significant since Vietnam. And many of the discussions that I've heard here in the last couple days are reminiscent of the conversations that I've heard in officers' clubs and in training meetings arguing about whether we, the United States Army, should undergo this transformation.

The observation here in the last couple of days has led me to conclude that we've had a one and a half day discourse on our baptism. And the conclusion, as Bishop Melczek pointed out last night, is that we must be lights of Christ in the world, both individually and collectively. This theme of light was present also in Bishop Senior's homily when he said that our response to the crises and the crises that we're facing must be rooted in Jesus Christ and our relationship with him. Christ is our light, Bishop Senior told us. Our work individually and collectively should let his light shine through.

This conference has been about letting Christ's light shine. Where our work, again, individually or collectively, lacks accountability, transparency, and collaboration, we place the basket over the light of the world, hiding the good works of his church.

Matthew 5:14:16 says, "You are the light to the world. A city built on a hill cannot be hid. No one after lighting a lamp puts it under the bushel basket, but on a lamp stand it gives light to all in the house. In the same way, let your light shine before others so that they may see your good works and give glory to your father in Heaven."

This conference has been about letting Christ's light shine. Where our work, again, individually or collectively, lacks accountability, transparency, and collaboration, we place the basket over the light of the world, hiding the good works of his church. In Bishop Serratelli's words, our actions have the potential to dim the light of our faith.

This conference for me has highlighted a set of actions designed to lift the basket and place the light on the lamppost. Proper implementation of Standards for Excellence, the use of Catholic

Leadership 360, the Pastor's Toolbox, the services of the consultancy: they all enhance accountability, transparency, and collaboration.

But each program is a means; I was very happy to hear my buddy Aristotle quoted. Each is a means. It is a coherent set of programs and services that can, and should be, adapted to local conditions, but that have the potential for transformational effect on temporal management affairs. But they're still just means. They're means to a greater end. And that greater end is letting the light of Christ shine through our work. And when the procurement and investment initiatives reach fruition, they also have the potential to become means towards that same end.

So for me, wrapping up the conference is really relatively easy because Bishops Melczek, Senior, and Serratelli have already done it. The Standards, Catholic Leadership 360, the Pastor's Toolbox, CatholicPastor.org, the procurement and investment initiatives, and consultancy services are all the things that we talked here about, but they are really not about us. They are about helping reveal Christ in our work and giving glory to our father in heaven. They are about letting his light shine. So this day and a half I think should be a reminder to us all how grateful we should be. How happy we should be to live among a set of people who are dedicated to such worthy tasks. But as Jack Connor said, this is no big deal. This is what we should be doing. This is what we were baptized to do.

Geoff Boisi

I just briefly want to thank all of you for your participation, not only for the last day and a half, but there are so many of you who have been here from the very beginning.

Your contribution of expertise and intelligent questioning and identification of best practices, and the sharing of your experiences in your various realms, really makes what this organization is all about work.



Geoff Boisi

For me, the day and a half that we spend each year here is a very inspiring and reaffirming experience. Particularly in the past couple years, the financial situation facing the country has been a jolt to the system. I think that we are coming to the realization as a culture, as a nation, and as organizations and leaders within the organization that we are in a period where the reset button has to be pushed. Our approach to the issues we are facing must take into consideration things that we have learned before, but we have to do things new ways. And that is why an organization such as ours is important. And hopefully it is contributing to solving some of the key problems.

To me, this is all about leadership. It's all about leadership. It's a privilege to be in a room over the course of a day and a half with people who are exercising leadership across not only the church in the United States, but in their various fields. And hopefully you agree that we are honoring our commitment that we stated when we first came together seven years ago informally, and then five

years ago as a formal organization. We promised to bring creative thinkers and leaders from all walks of life to focus on the mission of the church in the United States.

There is always a reaffirmation of why we are doing what we're doing. And that is related to the mission. I will say that as a parent of four, and as a grandparent, part of the reason why we do this is not only our responsibility and obligation to the faith but also for our kids and our grandkids.

We must invite foundations, individuals, and families who are committed to furthering the faith in the country in a creative way, in a realistic and practical way, to work with us.

I don't know about you, but the notion of responsibility that we have to pass on this faith to those kids in the future to me is a very important thing. I think it's the reason why a lot of folks are involved with us, because we are nervous, if not scared, about our ability to do this in an effective way. We are committed as an organization to try to identify the best practices out there, the best ideas out there. But not only to talk about them, but to put them in action. I think we have consistently done that.

As my friend and fellow trustee Susan King has noted and reminded me, I'm never satisfied with the speed or the breadth with which we advance our mission. But I do recognize that we are making progress. I think you should take comfort in the fact that over the course of the last years that we've been doing this, and I think Bishop Melczek and some of the other bishops who have been with us have been witness to that, that the bishops are listening to us. We were invited by Cardinal George to hold a special presentation for bishops on the financial crisis. We were invited by the US Conference of Catholic Bishops to host a meeting for bishops at the start of their fall assembly in Baltimore. These are major steps forward for the Leadership Roundtable, and they demonstrate that some bishops are eager to work with us and embrace our ideals.

The bishops are an important part of the church, but not the only part. The fact that we have relationships with groups such as CRS and other organizations represented in this room is equally as important to the work that we're doing with the bishops.

From an organization, though, we have to become even more national than we have. Over the course of the last year, we have hosted some meetings out on the West Coast, in Chicago, Boston and New York. We'd like to convene in the South. We must now take the 250 members of the council and expand that to a larger group. We encourage you to identify people, other leaders from all walks of life, both working inside the church, secular leaders as well, in the different functional areas where you know we work. We encourage you to identify those folks so that we can invite them to participate with us.

Our biggest constraint right now is not ideas. It is frankly not access to quality people and insight. Right now our biggest constraint is funding. We must invite foundations, individuals, and families who are committed to furthering the faith in the country in a creative way, in a realistic and practical way, to work with us. Again, we encourage you to identify two, three, four individuals who can help us from a philanthropic standpoint.

We're also looking for insightful leaders to expand our ranks. I'd like to see us double, frankly, the number of folks that are involved with us over the next couple of years. Hopefully you feel that the things we have discussed at this meeting are important. We heard loud and clear that we must figure out how we can contribute to the dialogue about finding solutions to the challenges facing Catholic schools. I think there are people who are more capable than we in certain ways, but I think the convening power that we have, our ability to ask the unaskable questions, the difficult questions, may be a contribution that we could make.

Thank you.

2010 ANNUAL MEETING AGENDA

A Blueprint for Responsibility: Responding to Crises with Collaborative Solutions

Summary

Internal and external events continue to impact every dimension of the Catholic Church both at home and abroad. Many Catholic institutions remain shaken from the aftermath of the global recession, mired in an environment that challenges even the most well managed parishes, dioceses and Catholic nonprofit organizations. Internally, episodes of abuse and mismanagement from the past several decades that are now coming to light in Europe and elsewhere challenge clergy, religious and laity to share responsibility and promote accountability in all aspects of church life. While the crises are serious, there is hope.

The Leadership Roundtable's 2010 Annual Meeting addresses these twin crises facing the church: the ongoing economic crisis and the reemerging crisis of clergy sexual abuse and accountability. Church leaders and experts will explore ways the Catholic community has responded to the sex abuse and mismanagement crisis here, highlighting the lessons learned from the American experience, promoting what worked and seeking understanding and clarity from what didn't. Management, finance and communications experts will consider strategies for Catholic organizations to emerge from the current reality stronger, offering practical models of best practice in consultation, management, finances and fundraising. With a focus on transforming organizations to be worthy of continued and perennial generosity, participants are to discuss paramount organizational attributes that donors and all the faithful expect: accountability, transparency, and integrity.

The church faces a prodigious yet surmountable obstacle, and this dynamic conference aims to be a part of the solution, one that envisions the church with the necessary resources to continue faithfully living out the call of Christ to care for all God's people.

WEDNESDAY, JUNE 23

5:00–7:00pm..... Welcome reception

THURSDAY, JUNE 24

7:30am Breakfast

8:00am Registration

8:30am Opening prayer

Welcome and Introduction

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

8:45am **Activities and Accomplishments: Achievements of the Roundtable**

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

Mr. Thomas Healey, President, Healey
Development

Dr. Charles Geschke, Co-Founder and
Co-Chairman, Adobe Systems, Inc.

Rev. John Wall, President, Catholic Church
Extension Society



Fr. Jack Wall

9:15am **Plenary Session: Strategic Input**9:45am **Keynote Address: Accountability in a World Church: A Global Perspective on the Case for Collaboration**

Mr. John Allen, CNN Vatican Correspondent

10:15am Q & A

11:00am Break

11:15am **Lessons Learned: the US Response to the Sexual Abuse Crisis**

Moderator: Dr. Kathleen McChesney, President, Kinsale Management
Consulting

Most Rev. Blase Cupich, Bishop of Rapid City

Ms. Teresa M. Kettelkamp, Executive Director, USCCB Secretariat of Child
and Youth Protection

Ms. Diane Knight, Chair,
National Review Board

11:45am Q & A

12:30pm..... Lunch

Joy in the Face of Adversity: Learning
from the Saints

Rev. James Martin, SJ, Culture Editor,
America Magazine



Fr. James Martin, SJ. View the talk at
www.TheLeadershipRoundtable.org/2010videos

1:45pm The Economic Crisis and the Church's Response

Moderator: Dr. Geno Fernandez,
Partner, McKinsey & Co.

Mr. Patrick Grace, Partner, Apollo
Philanthropy Partners, LLC

Mr. Alan Rappaport, Vice Chairman,
Roundtable Investment Partners,
LLC



Patrick Grace, Geno Fernandez, and
Alan Rappaport. View the presentation
at www.TheLeadershipRoundtable.org/2010videos

2:15pm..... Q & A**2:45pm..... Break****3:00pm..... Workgroups****A Roadmap for Financial Stewardship and Sustainability*****I. Strength in Numbers to Spend Less: Coordinated Procurement***

Facilitator: Mr. Patrick Grace, Partner, Apollo Philanthropy Partners

II. Strength in Numbers to Earn More: Pooled Investments

Facilitator: Mr. Alan Rappaport, Vice Chairman, Roundtable Investment
Partners, LLC

III. Reliable Revenue through Electronic Giving

Facilitator: Mr. Brian Walsh, President, Faith Direct

IV. Standards for Excellence

Facilitator: Mr. Michael Brough,
Director of Planning and
Programs,
National Leadership
Roundtable on Church
Management



*V. Important Practices Related to Fiscal Health of Catholic Schools:
Ensuring the Value Proposition*

Facilitator: Mr. Richard Burke, President, Catholic School Management, Inc.

4:30pm Adjourn

5:00pm Celebration of the Eucharist

Principal Celebrant: Most Rev. Timothy C. Senior, Auxiliary Bishop,
Archdiocese of Philadelphia

6:00pm Reception

7:00pm Awards Banquet

Diocese of Gary, Most Rev. Dale J. Melczek and Catholic Relief Services, Mr.
Ken Hackett

FRIDAY, JUNE 25

7:30am Breakfast

8:30am Opening Prayer

Welcome and Introduction

Dr. Francis J. Butler, President, Foundations and Donors Interested in Catholic
Activities

Opening Reflection

Most Rev. Arthur Serratelli,
Bishop of Paterson

9:00am **The Moral Biography of
Wealth and the New Physics of
Philanthropy**

Dr. Paul Schervish, Center on
Wealth and Philanthropy,
Boston College



Geoff Boisi, Jack Connors, Fr. Donald Monan, SJ

9:30 am Q+A

9:45am **A Blueprint for Generosity**

Mr. Jack Connors

10:15am Q+A

- 10:30am Break

- 10:45am A Blueprint for Accountability
Mr. John Kaneb, Chair and CEO,
HP Hood, LLC

- 11:10am Q+A

- 11:30am The Catholic Standards for Excellence
Lt. Gen. James Dubik (US Army-Ret.)

- 11:45am Closing Remarks
Mr. Geoffrey T. Boisi, Chairman

- 12:15–1:15 Lunch

- 1:15pm–2:45pm Board of Directors Meeting

PARTICIPANTS

Bishops

MOST REV. BLASE CUPICH is Bishop of Rapid City.

MOST REV. BASIL LOSTEN is Eparch emeritus of the Eparchy of Stamford.

MOST REV. DALE MELCZEK is Bishop of the Diocese of Gary.

MOST REV. GEORGE MURRAY, SJ is Bishop of the Diocese of Youngstown.

MOST REV. PATRICK PINDER is Archbishop of Nassau.

MOST REV. TIMOTHY SENIOR is Vicar General at the Archdiocese of Philadelphia.

MOST REV. ARTHUR SERRATELLI is Bishop of the Diocese of Paterson.



Bishop Dale Melczek and Bishop Patrick Pinder

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Dennis Corcoran



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Peter Denio



Betty Ann Donnelly

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Ken Hackett



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Deacon Anthony Rizzuto



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Fr. Richard Vega



Fr. Jeffrey von Arx, SJ

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National Leadership Roundtable on Church Management, 2009

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National Leadership Roundtable on Church Management, 2008

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



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

National Leadership Roundtable on Church Management, 2007

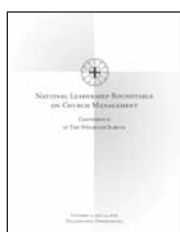
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Bringing Our Gifts to the Table: Creating Conditions for Financial Health in the Church

National Leadership Roundtable on Church Management, 2006

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A Call to Excellence in the Church

National Leadership Roundtable on Church Management, 2005

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 as set forth 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.TheLeadershipRoundtable.org/standards or e-mail info@nlrcm.org or call 202-223-8962.

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