



## Resources & Recommendations for Creating a New Culture of Leadership Catholic Partnership Summit 2020

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

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

Each of these topics is listed below, along with resources and possible recommendations to help our Church create a new culture of leadership. These represent a sample of the best practices available to our Church today. While Leadership Roundtable does not necessarily endorse any of these specific recommendations, we offer them to aid the discussion at the Catholic Partnership Summit, as well as in your local faith communities. At the Catholic Partnership Summit, participants will be invited to listen to the panelists, draw from their own experience, and/or use the following recommendations in this document in order to lift up actional recommendations that will support the creation of a new culture of leadership. Leadership Roundtable will gather the top recommendations into a report that will be shared with the wider Church to advance the national conversation.

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

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

*The resources with hyperlinks below may be accessed at [leadershiproundtable.org/leadership](https://leadershiproundtable.org/leadership)*

## Session 1: Envisioning a New Culture of Leadership

### Description

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

### Best Practices

#### [Apostolic Exhortation, Joy of the Gospel, November 2013](#)

In this Exhortation, Pope Francis seeks to “encourage the Christian faithful to embark upon a new chapter of evangelization” that is marked by joy and points toward “new paths for the Church’s journey in years to come.”

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

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

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

Synodality is “the involvement and participation of the whole People of God in the life and mission of the Church.” It concludes with practical, pastoral approaches for making synodality happen “on all levels” to create “an authentic synodal experience of Church.” Pope Francis later said in response to the document, “synodality is a style, it is walking together, and it is what the Lord expects of the Church in the third millennium.”

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

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

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

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

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

Bishop McElroy suggests that the church in the United States could move forward from this painful moment in its history by embracing a synodal pathway that could listen to the needs and concerns of all the church and communally discern a new path. He provides four characteristics or themes that could help the church renew itself: 1) a missionary church, 2) a co-responsible and participatory church, 3) a welcoming church, and 4) a church of harmony and dialogue. He quotes Pope Francis who said, “A synodal church is a church which listens....” and that this listening must occur at every level in the church.

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

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

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

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

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

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

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

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

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

### Description

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

### Best Practices

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

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

#### [The Australian Catholic Bishops Conference \(ACBC\)'s “Review of Governance and Management of Dioceses and Parishes” project plan](#)

The Royal Commission of Australia recommended that the Australian Catholic Bishops Conference should conduct a national review of the governance and management structures of dioceses and parishes, including in relation to issues of transparency, accountability, consultation and the participation of lay men and women. This review should draw from the approaches to governance of Catholic health, community services and education agencies. They mention the following essential elements to good governance: integrity; transparency; accountability; risk management; culture and ethics; consultation; inclusiveness; and the participation and genuine responsibility of men and women.

#### [Myriam Wijlens' “The Doctrine of the People of God and Hierarchical Authority as Service in Latin Church Legislation on the Local Church”, The Jurist Journal, 2008](#)

A theological and canonical reflection on the connection between Vatican II, post conciliar legislation, and governance.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## **Recommendations**

The following recommendations are drawn from the above resources.

### **Co-Responsible Governance**

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

- Create structures for the inclusion of women in leadership and decision-making at every level of the Church

### **Restoring Trust**

- Provide consistent, transparent, and coordinated communications at all levels and develop a proactive plan for restoring trust
- Encourage senior pastoral leaders to build trust and respect by setting up listening processes and making opportunities to be held publicly accountable
- Make the bishop selection process more transparent, utilizing a genuine discernment process that includes laity and clergy

### **Synodality**

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

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

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

### **Seminary Formation**

- Include a special emphasis on leadership training, solid academics, spirituality, reading the signs of the times, commitment to the poor, and servant leadership
- Utilize 360-degree assessments for bishops and all Catholic leaders that begin in seminaries and ministerial programs; assessments should be linked to appointments
- Ensure seminary curriculum addresses abuse prevention, improved human formation, personal integrity, and the experience of survivors
- Involve seminary faculty members, including lay women and men, in the evaluation and voting on seminarians and their advancement towards Holy Orders
- Involve women in diocesan programs for ongoing clergy formation

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

### Description

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

### Best Practices

[U.S. Conference of Catholic Bishops “Stewardship: A Disciple’s Response, A Pastoral Letter on Stewardship” & LPI’s summary “Stewardship: A Disciples’s Response in a Nutshell”](#)

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

[USCCB Ad Hoc Committee on Diocesan Audits, Report to the Body of Bishops, November 2007](#)

This document reports on how the use of either internal or external reviews and audits of parishes would enhance the transparency and accountability of Church finances and the good stewardship of pastors and administrators.

[USCCB Committee on Budget and Finance, “Diocesan Internal Controls: A Framework”](#)

This document speaks of management fraud and deceptive financial practices and offers specific guidelines on how dioceses can minimize risk.

[USCCB’s Socially Responsible Investment Guidelines](#)

This document provides dioceses and other Catholic institutions with guidance on exercising, faithful, competent and socially responsible stewardship in how they manage and invest their financial resources.

[Dicastery for Promoting Integral Human Development’s “Vocation of the Business Leader”](#)

The document speaks of the “vocation” of business women and men and of the challenges and opportunities that the business world offers them.

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

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

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

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

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

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

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

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

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

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

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

A high-level overview of trends among Catholic foundations.

## **Recommendations**

The following recommendations are drawn from the above resources.

### **Ethical Financial Leadership**

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

### **Transparent Financial Leadership**

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

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

- Convene an active finance council in every parish and diocese as required by canon law
- Identify a process for the finance council to select new members and ensure they reflect the diversity of the people in the community that the diocese/parish serves

- Select individuals for the finance council who possess the specific skills for the role and to achieve the vision for the diocese/parish
- Implement term limits and limits on the number of consecutive terms for finance councils
- Ensure that finance councils have at least five members (who are unrelated) who meet as frequently as is needed, at a minimum four times a year
- Engage in coordinated succession planning and leadership development to ensure a thorough process for the recruitment and development of new council members

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

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

### **Faithful Stewardship and Philanthropy**

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

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

### Description

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

### Best Practices

[Vatican's Synod Process on Young People, the Faith, and Vocational Discernment Preparation Process & Pre-Synodal Document](#) & [Post-Synodal Exhortation "Christus Vivit"](#)

The synodal process that led up to and followed the 2018 Synod of Bishops on Young People, the Faith, and Vocational Discernment included insights from youth and young adults for the Church, and ways forward for the pastoral care and co-responsible engagement of young people of all cultures and creeds

[Voices of Synod 2018: Building Relationships with Young Adults](#)

A brief video noting the need for older Catholics to build relationships with young adults.

[V Encuentro's Young Adult Reports](#)

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

[National Dialogue on Catholic Pastoral Ministry with Youth and Young Adults](#) & [Additional Resources for Hosting a Conversation with Young Adults](#)

A multi-year collaborative process, from 2017 to 2020, involving the U.S. Conference of Catholic bishops and several national organizations that connect the Church's ministries with young people and mobilize the Church towards action.

[United States Conference of Catholic Bishops' Webinar Series on Engaging Young Adults](#)

The USCCB Youth and Young Adult Ministries office and the National Advisory Team on Young Adult Ministry host and collaborate on a series of webinars that unpack "Christus Vivit" and give best practices for the pastoral care and evangelization of young adults.

[United States Conference of Catholic Bishops' Video Presentation on "Christus Vivit"](#)

Archbishop Charles Chaput, Bishop Frank Caggiano, and two young adults (Brenda Noriega and Brian Rhude) present the implications of "Christus Vivit" on the Church in the United States. To watch, click the link above and press the icon in the upper right corner of the video and find "Day 2 Afternoon Session B".

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

A report, integration guide, and accompanying resources with the latest research on why young Catholics disaffiliate.

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

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

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

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

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

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

[Catholic Apostolate Center's "Art of Accompaniment" & Apostles on Mission](#)

The "Art of Accompaniment" contains theological and practical elements to accompaniment as an approach for ministry, including with young adult Catholics. Apostles on Mission is a practical program that pairs young adults with a mentor, helps them discern their gifts, and empowers them to put together a personal ministry project.

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

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

[Growing Young](#)

Fuller Seminary targeted churches that were engaging young people so well that the church communities were getting younger.

## **Recommendations**

The following recommendations are drawn from the above resources.

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

- Create a robust process by which to listen and solicit feedback from a diverse group of people in multiple formats such as in-person meetings, social media, surveys, etc.
- Engage young people at the grassroots and ensure their voices are included and lifted up from the local to the regional to the national level
- Provide resources to engage feedback that are culturally appropriate and sensitive to diverse audiences

### **Ministry with, for, and by Young Adults**

- Create new ministries that engage young adult Catholics, from their creation to their delivery
- Provide pastoral care for young adults at different stages (i.e. workforce, college, family), at key transitional moments, through economic struggles, through issues of mental health, on the margins (migrants, excluded groups, etc.)
- Engage young adult Catholics not only in the pews, but also the unaffiliated using the works of justice, beauty, the intellectual tradition, missionary evangelization, and new media

### **Leadership Development**

- Offer presentations and trainings in Catholic leadership development such as servant leadership, faithful and prudent stewardship, collaborative ministry, etc.
- Provide formal mentorship opportunities and accompaniment to equip young adult Catholics for leadership positions
- Create local peer support groups that meet on a regular basis
- Provide leadership development for roles in parish and diocesan life at Catholic colleges and Newman Centers
- Consider the practice of succession planning as applicable to service to the Church: who are young adults that can be connected to your profession or vocation and accompany you (just as much as you might accompany them)? Who can be engaged now so that the mission continues?
- Appoint young adults to leadership positions now—can they serve on a board or council? Can they be invited to an advisory meeting?

### **Ongoing Research**

- Survey current formation programs, lay ecclesial ministry processes, etc. to determine what best practices exist in those fields and how best to adapt them to serve young adults
- Continue to invest in research on young adult Catholic engagement such as the Young Catholic America study by Christian Smith and the Going, Going, Gone study by St. Mary's Press