2021 Catholic Partnership Summit

Building a Church for the Future: Mission, Stewardship, and Restoring Trust in a Post-Pandemic World

September 28 – 29, 2021

-Virtual-
In partnership with lay, ordained, and religious leaders and organizations across all sectors of the Catholic community in the United States and Rome, Leadership Roundtable seeks to elevate and implement best practices in management and leadership to establish a culture of co-responsible, servant leadership for a healthy, thriving Church in the U.S.
Dear Friend,

On behalf of our co-hosts, Leadership Roundtable’s board of directors, and the staff, we welcome you to the 2021 Catholic Partnership Summit. As a Church and society, we have faced a year like none other. The 2021 Catholic Partnership Summit takes place at a critical time as we are navigating a new reality with the pandemic still significantly impacting our lives. We are grateful for your leadership of our Church over this last year and your willingness to join us virtually for these important conversations.

Each year, the Catholic Partnership Summit brings together Catholic leaders to address the most pressing leadership and management challenges and opportunities of our times. Today, we are called to help build a Church for the future, to look deeply at how our Church stewards its many resources and the potential that lies ahead. We are excited that, for the first time, we will be joined at our Catholic Partnership Summit by participants who are gathered together in Rome. This special gathering allows more leaders to join in these important conversations and the recommendations that will result from our time together.

From it’s people and financial resources, to the often underutilized potential that can be engaged for the betterment of the Church, we are eager to convene with you to look at how we heal, strengthen, rebuild trust, and move forward together, co-responsibly, in a spirit of synodality.

We’ve compiled this program book to be a resource for you as you participate in the 2021 Catholic Partnership Summit. In this book you will find:

• Guides to follow along with our prayer services
• Information on speakers and sessions
• Questions to prompt your discussions of these important topics as you work to form recommendations
• And more.

You will also be introduced to our 2021 recipients of the J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal. These three individuals and their families have made significant financial and intellectual contributions to the Church in the past year and during their lifetimes. We are honored to recognize their impact.

Thank you for your presence at this virtual gathering and your ongoing support that enables us to equip Catholic leaders and elevate and implement best practices in management and leadership to establish a culture of co-responsible, servant leadership for a healthy, thriving Church in the United States.

Geno Fernandez  
Co-chair of the Board

Elizabeth McCaul  
Co-chair of the Board
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Guiding Principles

The 2021 Catholic Partnership Summit seeks to build upon recent conversations surrounding the financial crisis within the Church, the COVID-19 pandemic, as well as our 2020 Catholic Partnership Summit. During our time together we will follow the guiding principles for establishing recommendations set forth below.

All recommendations put forth during the 2021 Catholic Partnership Summit will:

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 lay, religious and clergy members of the Catholic faith working together for the mission of the Church

5. Lean forward into new possibilities

6. Be realistic and able to be translated into practical strategy and implementation.
We are pleased that you’ve joined us for our virtual 2021 Catholic Partnership Summit. This two-day event is an interactive online experience that features many of the aspects attendees have come to value about the Catholic Partnership Summit including: robust small group discussions; connecting and networking with fellow Catholic leaders; in depth synthesis of discussions; the generation of actionable recommendations; and the ability to interact with and ask questions of speakers. Our virtual format also provides:

**VIRTUAL EXPERIENCE**

As with all Leadership Roundtable convenings, we gather Catholics together to address the most pressing leadership and management challenges and opportunities. We work to create a space in which people share their ideas and experiences in dialogue with others and learn from one another. Through panels and table conversations, we hope to lift up the best ideas into actionable recommendations for the Church.

As such, we hope you will use the ideas generated, but ask that you do not attribute specific thoughts to particular people. We find that it stunts the dialogue process and does not encourage people to change their minds as they encounter new ideas.

*Your presence at this gathering indicates your agreement to abide by the Chatham House rule.*

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**CHATHAM HOUSE RULE**

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- **Professionally Produced Mainstage Content:** View presentations on the mainstage and reflect on critical conversations happening in the Church today.
- **Breakout Group Discussions:** Engage in small-group conversations with influential leaders and decision makers in the Catholic Church — all without having to leave the platform.
- **One-to-One Networking:** Have a serendipitous experience of “bumping into another attendee in the hallway” and engage in short conversations with other participants.
- **Tutorial Videos:** Access easy-to-follow video tutorials of the platform to learn how to use its many features.
- **Live Chat:** Communicate in real time with other members of our community and respond to mainstage content.
- **Live Q&A:** Submit questions for our expert speakers in real time and get answers to your questions live on the mainstage.
LIVE FROM ROME

Leadership Roundtable is pleased to welcome our partners in Rome to the 2021 Catholic Partnership Summit.

Joining us from Rome for the 2021 Catholic Partnership Summit are leaders from across dicasteries, congregations, and councils, as well as international Catholic organizations based in Rome — the first time we’ve been able to welcome such a group to our Summit.

This event will be hosted live by our Executive Partner, Kerry Robinson, and ESTEEM (Engaging Students to Enliven the Ecclesial Mission) National Coordinator, Nicole Perone at The Center for Missionary Animation (CIAM) at the Pontifical Urbaniana University. It will feature a presentation by Sr. Nathalie Becquart, XMCJ of the Vatican Synod of Bishops.

THANK YOU

to ELIZABETH McCaul and FRANK INGRASSIA for generously sponsoring our gathering in Rome.
Rev. Michael J. Garanzini, SJ began his tenure as President of the Association of Jesuit Colleges and Universities (AJCU) on July 1, 2020. Fr. Garanzini was elected by the AJCU Board of Directors, chaired by Rev. Brian F. Linnane, SJ, President of Loyola University Maryland. Fr. Garanzini currently serves as both Secretary for Higher Education of the Society of Jesus, and Chair of the Board of Directors for the International Association of Jesuit Universities (IAJU). He will complete his eighth year of service to the international network of Jesuit higher education while working at AJCU. Prior to these roles, Fr. Garanzini was president of Loyola University Chicago from 2001 to 2015. During his fourteen years at Loyola, he served on the AJCU Board of Directors, including a term as Chair. Under his leadership, Loyola grew in national recognition as an innovator in higher education, thanks to the establishment of Arrupe College, the first Jesuit community college in the United States.

While serving as Secretary for Higher Education, Fr. Garanzini led several initiatives to facilitate national and international collaboration among Jesuit institutions. In 2013, he hosted the first-ever meeting of Jesuit provincials, presidents and board chairs of U.S. Jesuit colleges and universities with Rev. Adolfo Nicolás, SJ, the former Superior General of the Society of Jesus, at Loyola Chicago. It was during this meeting that Fr. Nicolás delivered an address in which he called for “spiritual and heroic leadership” among all caretakers of Jesuit institutions. In 2016, Fr. Garanzini served as a delegate for General Congregation 36: a convening of Jesuits from across the world to elect a new Superior General and issue a new set of decrees for the Society of Jesus. In response to a call for increased networking during GC36, Fr. Garanzini organized a meeting at the University of Deusto in Bilbao, Spain in 2018, to launch the International Association of Jesuit Universities.

Fr. Garanzini holds a B.A. in Psychology from Saint Louis University and a Doctorate in Psychology and Religion from the Graduate Theological Union / University of California, Berkeley. He has taught at the University of San Francisco, the Gregorian University in Rome, Rockhurst University and Fordham University. Additional academic appointments include four years as academic vice president at Saint Louis University, and two years as special assistant to the president at Georgetown University. Fr. Garanzini entered the Society of Jesus in 1971 and was ordained as a priest in 1980.

Katie Diller Gleason is the Director of Campus Ministry at the parish serving Michigan State University, and the Coordinator of Campus Ministry for the Diocese of Lansing. Katie partnered with Leadership Roundtable as National Coordinator for the ESTEEM Leadership Program from 2013-2017. She has been an active member of the Catholic Campus Ministry Association throughout her career, notably serving as a regional professional development speaker, chair of the 2018 National Conference Committee, and currently as a member of the Board of Trustees. She also served on the Alliance for Campus Ministry, an advisory body to the Secretariat for Catholic Education within the United States Conference of Catholic Bishops.

Katie received a M.A. in Theological Studies from the University of Dayton and a M.S. in Cell Biology from Yale University. She also received an M.Ed. from the University of Notre Dame after completing two years as a volunteer teacher with the Alliance for Catholic Education.

Katie grew up in rural Northern Michigan and now lives in Lansing with her husband Brett and daughter Mary, a rambunctious toddler and future Catholic leader.
Kim Smolik, Ed.D, serves as an Executive Partner at Leadership Roundtable where she oversees the organization’s operations, communications, finances, and convenings. Throughout her career, Kim has proven to be a dynamic and committed advocate for leadership development, community service, and social justice. Prior to Leadership Roundtable, Kim served as the Executive Director of Franciscan Mission Service and is the founder of the Nonprofit Servant Leadership Program, which offers Catholic young adults the opportunity to give back as they develop their leadership and nonprofit management skills during one year of full-time service in Washington, DC. She also developed international service programs for Franciscan Mission Service in Kenya, Zambia, South Africa, Guatemala and Jamaica.

Kim received her Doctorate of Education from the University of St. Thomas in Minneapolis, MN and holds an MA in Curriculum Development and Cross-Cultural Education from the University of Alabama, and a BA in History and Education from Bethel University in St. Paul, MN. She is a Certified Intercultural Development Inventory Administrator, a certified Co-Active® leadership and executive coach, and an experienced facilitator in diversity and racial justice trainings. Kim has extensive cross-cultural expertise, having taught high school, college, and adult social justice advocacy programs in Cuba, Guatemala, Ecuador, and Mexico. She has worked in and traveled to over 65 countries.

Patrick Markey is managing partner of Leadership Roundtable. Prior to joining Leadership Roundtable, he was Executive Director of the Diocesan Fiscal Management Conference (DFMC) for eight years. From 2003 to 2013, Patrick worked at the United States Conference of Catholic Bishops (USCCB). In 2007, the bishops entrusted him with starting the Office of National Collections office. Before the national collections, Patrick worked for many years of his career as an executive in Catholic publishing, including five years at the USCCB. His early professional years, however, were in investment banking. He is a Certified Public Accountant and holds an executive MBA degree from the University of Loyola in Baltimore.
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<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
<th>Notes</th>
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<tbody>
<tr>
<td>12:30 p.m.</td>
<td>Opening Remarks</td>
<td>Synthesizers: Rev. Michael Garanzini, SJ, Association of Jesuit Colleges and Universities, Katie Diller Gleason, Diocese of Lansing</td>
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<td>1:35 p.m.</td>
<td>Break</td>
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<td>1:45 p.m.</td>
<td>Breakout Group Discussions</td>
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<td>2:45 p.m.</td>
<td>Plenary</td>
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<td>3:00 p.m.</td>
<td>Synthesis</td>
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<tr>
<td>3:15 p.m.</td>
<td>Break <em>Lounges are open for networking</em></td>
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4:00 p.m. EDT  

**Session 2: Stewardship of People**  

Panel  
Susan Pascoe, *Vatican Synod of Bishops*  
Ellen Mady, *Diocese of Pittsburgh*  
Gene McQuade, *Citibank (retired)*  
Moderator: Mar Muñoz-Visoso, *U.S. Conference of Catholic Bishops*

5:00 p.m. EDT  
**Break**

5:10 p.m. EDT  
Breakout Group Discussions

6:00 p.m. EDT  
**Plenary**

6:20 p.m. EDT  
**Synthesis**

6:35 p.m. EDT  
Interactive Virtual Cocktails

7:00 p.m. EDT  
**J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal Ceremony**  

_A special evening honoring the recipients of the 2021 Monan Medal._

Opening Prayer:  
Archbishop Christophe Pierre, *Apostolic Nuncio*

8:00 p.m. EDT  
Adjournment
**Event open for exhibit halls and connecting with other attendees**

**Opening Prayer Service**

*Led by:*
ESTEEM (Engaging Students to Enliven the Ecclesial Mission) site leaders, alumni, and friends

**Session 3: Stewardship of Financial Resources**

*Panel*
Elizabeth Jensen, Roman Catholic Diocese of Orange
Matthew Manion, Center for Church Management, Villanova University
Jim Perry, Madison Dearborn Partners
Moderator: Patrick Markey, Leadership Roundtable

**Breakout group Discussions**

**Plenary**

**Synthesis**

**Break** "Lounges are open for networking"
2:00 p.m. EDT  **Session 4: Stewardship of Potential**  

**Panel**
Sr. Nathalie Becquart, XMCJ, Vatican Synod of Bishops  
Amy Rauenhorst Goldman, GHR Foundation  
Kelli Reagan, Center for Social Concerns, University of Notre Dame  
**Moderator:** Louis Damani Jones, Catholic Urban Programs  

3:00 p.m. EDT  **Break**  

3:15 p.m. EDT  **Breakout Group Discussions**  

4:00 p.m. EDT  **Plenary**  

4:20 p.m. EDT  **Synthesis**  

4:30 p.m. EDT  **Wrap Up/Next Steps**  

5:00 p.m. EDT  **Closing Prayer Service**  

**Presider:**  
Archbishop José Gomez, Archdiocese of Los Angeles, U.S. Conference of Catholic Bishops  

5:15 p.m. EDT  **Event open for networking**  

6:00 p.m. EDT  **Conclusion**
IMPACT of the 2020 Catholic Partnership Summit

The important work we do together has impacted Catholics across the globe

<table>
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<tr>
<th>Shared Solutions</th>
<th>Influenced the Conversation</th>
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<tbody>
<tr>
<td><strong>2,000+ copies</strong> of our 2020 Catholic Partnership Summit report distributed with recommendations for implementation</td>
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<tr>
<td><strong>36 Media reports published</strong> featuring Leadership Roundtable’s work and the work of our partner organizations.</td>
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**Engaged Catholic Leaders**

265 Summit attendees from 64 Dioceses and Rome including:

- 34 Young adult leaders
- 13 Cardinals, Archbishops and Bishops

**SUMMIT SPEAKERS INCLUDED:**

- 45% women
- 33% young adults
- 21% people of color
- 72% lay leaders

Young adults were present at **ALL of the 27 tables** during the 2020 Catholic Partnership Summit and included in every discussion, notably the all-young-adult final panel

**ADvised** the authors of the Australian Catholic Bishops Conference and Catholic Religious Australia report “The Light from the Southern Cross: Promoting Co-Responsible Governance in the Catholic Church in Australia.” The Catholic Partnership Summit and Leadership Roundtable’s services and resources are repeatedly referenced in the 208-page Australia report as **MODELS FOR HOW THE CHURCH CAN ADDRESS CRISIES.**

Leaders at the 2020 Catholic Partnership Summit named the **FINANCIAL CRISIS** facing the Church and set forth recommendations already being utilized to address it
The 2020 Catholic Partnership Summit gathered Catholic leaders to listen and learn from one another and collectively recommend actions to move the Church toward a culture of co-responsible leadership. The 2020 Summit and its resulting recommendations have already begun to impact the Church.

**Implementing the Summit Recommendations**

Engaged Catholic financial leaders from **15 ORGANIZATIONS** in the **Coalition for Ethical Financial Management in the Church** that has met regularly throughout 2021

Formed **3 ACTIVE WORKING GROUPS** to develop recommendations for **best financial practices, research and benchmarks**, and **finance councils** that directly funnel into the 2021 Catholic Partnership Summit

**Activated Catholics**

Added **39 engagements** with dioceses, parishes, and Catholic organizations

Added **8 new ESTEEM sites** for a total presence at more than **20 U.S. college campuses**

Added **4 new members** to Leadership Roundtable Board of Directors

**EXPANDED** our **Latino Pastoral Leaders Initiative** to serve an additional cohort of Hispanic/Latino Leaders

**Moving Forward Together**

**CONVENED** the leaders of major Catholic organizations — including the **U.S. Conference of Catholic Bishops**, Catholic education, social services, healthcare and philanthropy — in **two COVID-19 Leadership Summits** to address the pandemic and collaborate for solutions

Helped launch the **#CATHOLICCARES** social media campaign during the pandemic to highlight the **stories of Catholics** serving those most in need

**LEVERAGED** the online giving platform, **iGiveCatholic** to help Catholic organizations raise critical funding early in the pandemic
SAVE THE DATE
September 22 & 23, 2022

2022 Catholic Partnership Summit

Fairmont Hotel, Washington D.C.
Day 1
Prayer Service
Sept. 28, 2021
† Gathering †

Welcome

Patrick Markey
Leadership Roundtable

Presider

Cardinal Joseph Tobin, CSsR
Archdiocese of Newark

Lord, † open my lips.
And my mouth will proclaim your praise.

Glory to the Father, and to the Son, and to the Holy Spirit.
As it was in the beginning, is now, and will be forever. Amen.
Alleluia.
Hymn: “O Love of God”/"Amor de Dios"

O LOVE OF GOD/AMOR DE DIOS

Bob Hurd

Refrain

O love of God, gather us, amor de Dios, haz-nos uno, that we may share the gifts we are given; para construir la comunidad, para construir la comunidad.

Verses

1. En el agua de vida nos convertimos
   In the living water we have been
   1. ti-mos en cuer-po del Se-nor.
   come one bod-y in the Lord.

2. Hay diversos dones,
   Man-y gifts of the Spirit, but the same
   2. só-lo Dios que nos ins-pi-ra.
   God who works them in us all.

3. Haz-nos una familia
   Make us all one family;
   3. u-ne por o-bras de tu a-mor.
   gath-er to do the works of love.

Text: Based on 1 Corinthians 12:4-6, 12-13; Bob Hurd, Pia Moriarty, Ana Victoria Demezas and Jaime Cortez. Text and music © 1994, Bob Hurd and Pia Moriarty. Published by OCP. All rights reserved.
The purpose of sacred silence is "to receive in our hearts the full sound of the voice of the Holy Spirit and to unite our personal prayer more closely with the word of God and the public voice of the Church."
(Liturgy of the Hours, 202)

REFRAIN

If to-day, if to-day you hear the voice of God, open up your heart and listen to his Word. If to-day you hear the voice of God, harden not your hearts, harden not your hearts.

VERSES

1. Come, sing your joy to the Lord, give praise to the God who saves us. O come, give thanks to the Lord, come before our God.
2. Come, let us worship the Lord, give thanks to the God who made us, for we are the sheep of his land, the flock led by his hand. He is the Lord of our lives, he is the Lord of our lives and we pray.

Ed Bolduc
Text and music © 1998, WLP
Psalm Prayer1

Let us pray.

Father, creator of unfailing light,
give that same light to those who call to you.
Soften our hardened hearts
and open our ears to hear your voice.
Today, and every day,
may our lips give you praise,
our lives proclaim your goodness,
our works give you honor,
and our voices celebrate you unceasingly.
Through Christ our Lord. Amen.

Scripture Reading: 1 Corinthians 12:12-132

As a body is one though it has many parts, and all the parts of the body, though many, are one body, so also Christ. For in one Spirit we were all baptized into one body, whether Jews or Greeks, slaves or free persons, and we were all given to drink of one Spirit.

Reflexion

Sr. Sharon Euart, RSM
Resource Center for Religious Institutes

Let us pray.

Love Eternal,
all those around us are gifts of your love.
Help us to show obedience to you
by loving one another
with the pure love of brothers and sisters,
especially those whom we find it most difficult to appreciate.
Triune God, receive our prayer,
which we ask through Christ our Lord. Amen.

Concluding Prayer3

Let us pray.

Love Eternal,
all those around us are gifts of your love.
Help us to show obedience to you
by loving one another
with the pure love of brothers and sisters,
especially those whom we find it most difficult to appreciate.
Triune God, receive our prayer,
which we ask through Christ our Lord. Amen.

Acclimation

Let us bless the Lord! And give him thanks.

1 Adapted from Liturgy of the Hours, Week I, Sunday
3 Liturgy of the Hours, Week II, Tuesday Midday Prayer, Reading
City of God

Verses 1, 2

1. A-wake from your slum-ber! A-rise from your sleep!
2. We are sons of the morn-ing; we are daugh-ter-s of day.

The One who has loved us for all those who weep.

The peo-ple in The Lord of all dark-ness have seen a great light.

The Lord of our kind-ness has called us to be a light for his long-ing peo-ple has con-quered the night.

Let us build the cit-y of God. May our tears be turned in-to danc-ing! For the Lord, our light and our love, has turned the night in-to day!

Refrain

Let us build the cit-y of God. May our tears be turned in-to danc-ing! For the Lord, our light and our love, has turned the night in-to day!
Session 1

Healing and Strengthening our Catholic Community in the United States
The past year has brought many challenges to the Church and its leaders. In this session, we will look at the effects of the pandemic, the specific challenges we face as a Church, and what they are teaching us. We will assess our current situation and build upon what we have experienced these last 18 months. Most importantly, we will discuss how we heal and strengthen our Catholic community, how we restore and rebuild trust, and what is needed to do so.

### Session 1

**HEALING AND STRENGTHENING OUR CATHOLIC COMMUNITY IN THE UNITED STATES**

The past year has brought many challenges to the Church and its leaders. In this session, we will look at the effects of the pandemic, the specific challenges we face as a Church, and what they are teaching us. We will assess our current situation and build upon what we have experienced these last 18 months. Most importantly, we will discuss how we heal and strengthen our Catholic community, how we restore and rebuild trust, and what is needed to do so.

### SPEAKERS

**Rev. Ron Rolheiser, OMI | Author**

Ronald Rolheiser, is a Roman Catholic priest and member of the Missionary Oblates of Mary Immaculate. He is President Emeritus of the Oblate School of Theology in San Antonio, Texas, and a Professor of Spirituality there. He is a community-builder, lecturer, and writer. His books are popular throughout the English-speaking world and have now been translated into many languages. His weekly column is carried by more than 80 newspapers worldwide. Prior to this present position, he taught theology and philosophy at Newman Theological College in Edmonton, Alberta, for 16 years, served as Provincial Superior of his Oblate Province for six years, and served on the General Council for the Oblates in Rome for six years. He has been at Oblate School of theology since 2005.

**Gloria Purvis | Host of The Gloria Purvis Podcast**

Gloria Purvis is a radio and media personality and host of The Gloria Purvis Podcast by America Media. She serves as a consultant for the U.S. Conference of Catholic Bishops’ Committee on Religious Liberty and is a Board member for The Northwest Center Maternity Home and Pregnancy Center in Washington, D.C. She has appeared in various media outlets including The New York Times, The Washington Post, PBS Newshour, Catholic Answers Live, and EWTN News Nightly, and hosted Morning Glory, an international radio show.

**Michael Brough (Moderator) | Executive Partner, Leadership Roundtable**

Michael Brough serves as an executive partner of Leadership Roundtable, working with senior Catholic executives and Church leaders to promote best practices in Church management and leadership. Over his 30 years of professional ministry in the Catholic Church, Michael has worked with and trained lay ecclesial ministers, priests, and bishops in dioceses and parishes across the United States and in 13 different countries. He has also served as a consultant to Catholic nonprofits, boards, foundations, and other institutions. Previously, Michael was executive director of RENEW International, the parish renewal and evangelization process. Michael began his career as an educator in Catholic High Schools and for SCIAF (Caritas Scotland). He received his MA in Social Anthropology from St. Andrews University, Scotland, his Masters of Pastoral Studies from Loyola University, New Orleans, and has further qualifications in clinical and pastoral counseling and education.
SESSION 1: HEALING AND STRENGTHENING OUR CATHOLIC COMMUNITY IN THE UNITED STATES

The past year has brought many challenges to the Church and its leaders. In this session, we will look at the effects of the pandemic, the specific challenges we face as a Church, and what they are teaching us. We will assess our current situation and build upon what we have experienced these last 18 months. Most importantly, we will discuss how we heal and strengthen our Catholic community, how we restore and rebuild trust, and what is needed to do so.

In Your Breakout Group

1. Drawing from the panel presentation, the questions and recommendations provided below, and your own experience, consider actionable recommendations that you think are most necessary and will make the most impact.

2. Dialogue with those in your breakout group and prioritize your recommendations.

During this small group breakout, you will engage in a dialogue with fellow participants on the theme of the first session: Healing and Strengthening Our Catholic Community in the United States.

The fruits of our discussion and discernment will be action. To help inspire our conversations to produce actionable solutions, we have compiled the following questions and recommendations. The facilitator of your breakout group will use these to guide the conversation and a scribe will capture the comments and results to report back to the larger group and include in the final Summit report.
Reflection Question

What new opportunities are emerging from the pandemic that can be utilized in dioceses, parishes, and ministries? And what support and resources do Church leaders need to help emerged from the pandemic?

Recommendations

- Create more opportunities for people to experience connection within your parish or in your ministry by committing to prioritize and re-imagine welcome, hospitality, and pastoral care.
- Promote resilience and wellbeing among clergy and lay ecclesial ministers by providing access to physical, mental, and spiritual wellness programs.
- Create spaces for people to engage in open and honest dialogue about topics and issues that impact your parish and community, and explore solutions.
Stewards is to take care of something and render an account for our stewardship. In this session, we will discuss the stewardship of the Church’s most important resource: its people. We will build upon ongoing efforts to build a synodal Church through increasing the number of young adults, women, and people of color around the leadership table. We will also look at the role of co-responsible finance councils and how we better develop and support lay leadership surrounding Church finances.

**SPEAKERS**

**Susan Pascoe | Member, Vatican Synod of Bishops, Commission on Methodology**

Susan Pascoe is Adjunct Professor at the University of Western Australia. She chairs the Australian Council for International Development, the Community Director’s Council, and the Advisory Board of Catholic Emergency Relief Australia. She is a member of the Commission on Methodology planning the forthcoming Synod on Synodality, a trustee of St John of God Health, and a board member of Mercy Health.

Susan is the Principal of consulting firm Kadisha Enterprises specializing in governance, strategy, and review. She was a member of the Governance Review Project Team established by the Australian Catholic Bishops Conference (ACBC) and Catholic Religious Australia (CRA) which produced the 2020 Report, *The Light from the Southern Cross: Promoting Co-responsible Governance in the Catholic Church in Australia*. In 2019-20 she was also a member of the ACBC- CRA's Steering Group, which reviewed safeguarding structures and processes in the Church in Australia.

Adj. Prof. Pascoe was the inaugural Commissioner for the Australian Charities and Not-for-profits Commission, the first national regulator of charities in Australia. Prior to this appointment, she was Commissioner at the Victorian State Services Authority overseeing the Victorian Public Service. She was one of three Commissioners on the Royal Commission into the 2009 Black Saturday Bushfires.

Her earlier career was in education where she served as Director of Catholic Education in the Archdiocese of Melbourne, and CEO and Chair of the Catholic Education Commission of Victoria. She was CEO of the Victorian Curriculum and Assessment Authority, and President of the Australian College of Educators. Adj. Prof. Pascoe is a Fellow of the Australian Institute of Company Directors, the Institute of Public Administration of Australia and the Australian College of Educators. She is a Member of the Order of Australia, and winner of the 2016 Leadership in Government Award.
Gene McQuade | Retired CEO, Citibank

Gene McQuade is a prominent banking executive with a distinguished career in leadership roles at companies such as Citibank, Freddie Mac, Bank of America, FleetBoston Financial and Promontory Financial Group. Gene served as Vice Chairman of Citigroup, from which he retired in May 2015. He joined Citigroup in 2009 as Chief Executive Officer of Citibank, where he was responsible for governance of the bank around the globe. In 2015, Gene joined Promontory Financial Group (an IBM company) as Vice Chairman of its Advisory Board. In 2020, Gene retired as a member of the Boards of Directors of both Citigroup and Citibank.

Prior to Citibank, Gene was President of U.S. Banks at Merrill Lynch Bank USA. He was previously President and Chief Operating Officer at Freddie Mac (2004-2007). Prior to Freddie Mac, he was President of Bank of America, following its acquisition of FleetBoston Financial Corp. During his banking career at FleetBoston, Gene held various senior positions, ultimately serving as President and Chief Operating Officer. Gene is a Certified Public Accountant, earning a degree in accounting from St. Bonaventure University, of which he was a Trustee and was awarded an honorary Doctorate in 2013. He is Governor of the Boys & Girls Club of America, Chairman of The Ireland Funds America as well as Chairman of Catholic Charities of the Archdiocese of New York. Gene has served on the Boards of Directors of Merrill Lynch Banks (Chairman), Bank of America and FleetBoston and also served as Chairman of XL Group Ltd., a Bermuda based insurer, until its sale in 2018. He also served as a Captain in the U.S. Army.

Mar Muñoz-Visoso (Moderator) | Executive Director, Secretariat of Cultural Diversity in the Church, U.S. Conference of Catholic Bishops

Mar Muñoz-Visoso is executive director of the Secretariat of Cultural Diversity in the Church at the U.S. Conference of Catholic Bishops in Washington, D.C. Before joining the Bishops’ Conference, Mar worked for the Catholic Archdiocese of Denver, where she served in various capacities, including being co-founder and first executive director of Centro San Juan Diego, a pastoral institute and adult education center for Latinos; director of Hispanic Ministry; and editor of El Pueblo Católico, the Spanish-language archdiocesan newspaper. Mar has a B.A. in Communications from CEU San Pablo University in Valencia, Spain, and a Master of Theological Studies (M.T.S.) from the Madonna University in Livonia, Michigan. She currently serves on the Advisory Committee for the Latino Pastoral Leaders Initiative of Leadership Roundtable.

Ellen Mady | Chancellor, Diocese of Pittsburgh

Ellen Mady has worked for the Diocese of Pittsburgh since 2014 as Director for Human Life and Dignity, Parish Services during the On Mission for the Church Alive planning process, and as Chancellor since January of 2019. In summer of 2021, Ellen completed her licentiate of canon law studies at Catholic University of America. Prior to moving to Pittsburgh, Ellen spent over a decade serving the Church in the United States and in the Middle East in a variety of capacities, focused primarily on educational leadership, social outreach, and pastoral theology. Ellen is mom to three amazing children and loves spending time outdoors, visiting historical and cultural sites, and writing about faith and spirituality.
SESSION 2: STEWARDSHIP OF PEOPLE

To steward is to take care of something and render an account for our stewardship. In this session, we will discuss the stewardship of the Church’s most important resource: its people. We will build upon ongoing efforts to build a synodal Church through increasing the number of young adults, women, and people of color around the leadership table. We will also look at the role of co-responsible finance councils and how we better develop and support lay leadership surrounding Church finances.

In Your Breakout Group

1. Drawing from the panel presentation, the questions and recommendations provided below, and your own experience, consider actionable recommendations that you think are most necessary and will make the most impact.

2. Dialogue with those in your breakout group and prioritize, in order, the top four recommendations.

During this small group breakout, you will engage in a dialogue with fellow participants on the theme of the second session: Stewardship of People.

As with Session 1, the fruits of our discussion and discernment will be action. To help inspire our conversations to produce actionable recommendations, we have compiled the following questions and recommendations. The facilitator of your breakout group will use these to guide the conversation and a scribe will capture the comments and results to report back to the larger group and include in the final Summit report.
Reflection Question

When your ministry, parish, diocese, or organization gathers to make decisions, who is around the table? Who is not represented? What do we need to do to broaden representation and diversity throughout the Church?

Recommendations

Synodality and Co-Responsibility

- Imagine and build new structures that reflect a more synodal model and that involve the laity much more in decision-making processes.
- Structure the consultative processes for the appointment of bishops to include an analysis of the needs of the diocese and genuine discernment that includes both clergy and a larger number of lay Catholics.
- Incorporate synodality in seminary curricula and culture by starting with a foundation in Vatican II: empower lay persons to take a critical role in the selection, formation and suitability for ordination of seminarians.
- Involve lay persons with appropriate expertise in decisions regarding the placement of priests in parishes.

Representation

- Build inclusivity into the operations of each diocese and its agencies: conduct inclusion audits and accelerate the appointment of lay women, young adults and people of color to senior leadership roles.
- Establish regular intercultural dialogues to incorporate each community’s contributions, acknowledge unique issues and concerns, and discern adequate pastoral responses.
- Invest in the education and ongoing formation of Hispanic/Latino leaders and people of color not equitably represented in ministerial leadership.

Co-Responsible Finance Councils

- Create a network of diocesan finance council chairs and provide formation to build internal capacity through creating guidelines for selecting independent, diverse, and competent people to serve.
- Establish open communication from the parish or diocese to the parish or diocesan community about budgeting and finances.
J. Donald Monan, SJ
Distinguished Catholic Philanthropy Medal
The J. Donald Monan, SJ
Distinguished Catholic Philanthropy Medal

Honorees

John M. Connors, Jr. Family
Presented by
Cardinal Seán O’Malley

Kathleen McCarthy Kostlan
Presented by
Archbishop José Gomez

Lewis Ranieri
Presented by
Cardinal Timothy Dolan

THANK YOU

TO THE J. DONALD MONAN, SJ DISTINGUISHED CATHOLIC PHILANTHROPY MEDAL SELECTION COMMITTEE

Geoffrey T. Boisi
John J. DeGioia
Cynthia Lee Egan
Rev. J. Bryan Hehir

Jeri Eckhart Queenan
Rev. Michael J. Garanzini, SJ
Rev. John J. Wall
Darla Romfo
The J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal seeks to inspire a culture of giving that promotes excellence in Church management and leadership. It recognizes outstanding Catholic philanthropists who exemplify the legacy of former Boston College President, Rev. J. Donald Monan, SJ. Rev. Monan’s life was a living testimony to how best practices, implemented in collaboration between clergy and laity, can transform a Catholic institution to bring excellence to management and mission.

The J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal recipients are Catholic philanthropists who have collaborated with Church leaders to make a significant impact on a parish, diocese, or other Catholic ministry in the area of Church management or leadership.

**SCHEDULE**

**Monan Medal Ceremony**

- **7:00 p.m. EDT**
  - *J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal Ceremony*
  - *Emcees: Elizabeth McCaul and Geno Fernandez, Leadership Roundtable Board Co-Chairs*
  - *Prayer: Archbishop Christophe Pierre, Apostolic Nuncio*

- **7:15 p.m. EDT**
  - *The Legacy of Rev. J. Donald Monan, SJ*
  - *Geoffrey T. Boisi, Founder, Leadership Roundtable*

- **7:30 p.m. EDT**
  - *Medal Presentations*
  - *John M. Connors Jr. Family. Presented by Cardinal Seán O’Malley*
  - *Kathleen McCarthy Kostlan. Presented by Archbishop José Gomez*
  - *Lewis Ranieri. Presented by Cardinal Timothy Dolan*

**ABOUT THE**

**J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal**

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The J. Donald Monan, SJ Distinguished Catholic Philanthropy Medal recipients are Catholic philanthropists who have collaborated with Church leaders to make a significant impact on a parish, diocese, or other Catholic ministry in the area of Church management or leadership.
John M. “Jack” Connors Jr. is known throughout Boston as a business leader and philanthropist who is dedicated to bettering the lives of the city’s residents and the Catholic Church.

Jack is a founding partner and chairman emeritus of Hill Holliday, Connors, Cosmopulos Inc. one of the top 20 advertising firms in the United States and a past chair of the Board of Trustees for Boston College. Under his leadership, Hill Holliday evolved from a one-room shop, founded in 1968, to one of the top 20 advertising firms in the United States.

Jack and his wife Eileen Connors are well known for their Catholic philanthropic work within the Archdiocese of Boston.

At the invitation of Cardinal Seán O’Malley, Jack has served as chair of the Board of Trustees for the Campaign for Catholic Schools since its inception in 2010. The Campaign for Catholic Schools is described as a change-agent for rebuilding Catholic education in the Archdiocese of Boston through new models that introduce lay governance, strong academics, facility improvement, new technology, and innovative teacher support.

Under Jack’s leadership, the Campaign for Catholic Schools raised more than $62 million for Boston’s Catholic schools and forever changed how the Archdiocese approached education.

In addition to his support for the Church, Jack also co-founded and raised more than $45 million for Camp Harbor View, a program that serves more than 1,000 youth each year from Boston’s underserved neighborhoods through a Summer Camp, Leadership Academy and Youth and Family Support Services.

Jack has served as on the boards of Boston College; Partners HealthCare System; Partners-In-Health; Harvard Medical School; Harvard T.H. Chan School of Public Health; Emmanuel College; Covidien and Hasbro; The American City Coalition; Brandeis University; and Camp Harbor View.

He has been honored with the Kennedy Institute’s inaugural Award for Inspired Leadership, in recognition of his service to the city of Boston and commitment to civic engagement and was recognized by The American City Coalition as “an articulate advocate for Boston’s world-class hospitals, and is a passionate and respected voice in the Catholic community for greater lay participation in the Church.”
Kathleen McCarthy Kostlan is Chairperson of the Thomas and Dorothy Leavey Foundation, one of California’s largest philanthropic organizations. Since its founding in 1952, the Leavey Foundation has donated more than $200 million to educational, medical, and Catholic institutions.

The Leavey Foundation was a major supporter of the Cathedral of Our Lady of Angels in the Archdiocese of Los Angeles. The Foundation’s donation to Santa Clara University, the second largest gift in the university’s history, helped build the Sobrato Campus for Discovery and Innovation. And, the Foundation supports the Catholic Education Foundation.

The Foundation has also donated to Georgetown University, Loyola Marymount University, Saint Paul the Apostle Church Los Angeles, the Paulist Fathers, Homeboy Industries, and Sisters of Social Service, among many other contributions.

Kathleen is a longtime trustee of the University of Southern California and a Trustee of the Children’s Hospital of Los Angeles and the Saint John’s Health Center Foundation. She is an alumna of USC (’57). The Leavey Foundation provided the lead naming gifts for Leavey Library and McCarthy Quad, established the Kathleen L. McCarthy Honors College at USC Village, and endowed the first Trustee’s Chair at the USC Gould School of Law.

In addition, Kathleen has been a Dame of the Order of Malta, Western Association and the Equestrian Order of the Holy Sepulchre.
Lewis Ranieri

Lewis S. Ranieri is founder and chair of Ranieri Solutions LLC, which is focused on financial services and the use of cognitive technologies. Lewis serves as chair and senior managing partner of Ranieri Partners LLC, an advisor and manager of private investments.

Lewis is the Chairman of Tomorrow’s Hope Foundation, which he formed in 2005 at the request of the Most Reverend Bishop William F. Murphy of the Diocese of Rockville Centre. The Foundation provides scholarship support to Long Island families in need, who wish to give their children a Catholic elementary education. Throughout the 16-year history of the Foundation, Lewis has played a crucial role in fulfilling the mission, which is to ensure the excellence as well as the continuance of Catholic schools on Long Island, by increasing awareness and providing scholarships and program funding for the needs of students and schools. Through his tireless fundraising efforts and exemplary service, Lewis had led the Tomorrow’s Hope board in granting $25 million in tuition assistance to more than 20,000 students since its inception.

Lewis has a strong belief in the value of Catholic education, and the conviction that today’s children are tomorrow’s hope. He believes that a Catholic school education is an essential ingredient to one’s spiritual maturity and serves to provide the religious foundation and moral framework that becomes the basis upon which all life’s decisions are made. He firmly believes that his Catholic family upbringing and Catholic school education instilled in him the integrity and moral grounding to pass the tests he’s faced through the years, even long after graduation and throughout his career.

Considered the “father” of the securitized mortgage market, Lewis helped develop the capital markets as a source of funds for housing and commercial real estate. Formerly Vice Chairman of Salomon Brothers, Inc., Lewis established Salomon’s leadership position in the mortgage-backed securities space and led efforts to obtain federal legislation to support and build the market.

Regarded as an expert and innovator in both the mortgage and capital markets, Lewis has served as Co-Chairman on the National Association of Home Builders Mortgage Roundtable continuously since 1989. Bloomberg Businessweek named him one of “the greatest innovators of the past 75 years,” and in 2005, he received the Distinguished Industry Service Award from the American Securitization Forum.
Day 2 Prayer Service

Sept. 29, 2021
Prayer service during Leadership Roundtable Annual Meeting
† Gathering †

Welcome

Kim Smolik
Leadership Roundtable

Opening Proclamation¹

_These words come to us from Annie Dillard._

Angels, I read, belong to nine different orders. Seraphs are the highest; they are aflame with love for God, and stand closer to him than the others. Seraphs love God.... The seraphs are born of a stream of fire issuing from under God’s throne. They are, according to Dionysius the Areopagite, “all wings,” having, as Isaiah notes, six wings apiece, two of which they fold over their eyes. Moving perpetually toward God they perpetually praise him, crying “Holy, Holy, Holy....

But according to some rabbinic writings, they can sing only the first “Holy” before the intensity of their love ignites them and dissolves them again, perpetually, into flames.

¹ Holy the Firm, Annie Dillard

Liturgical Ministers for this prayer service are site leaders, alumni, and friends of ESTEEM.
Opening Song: “Morning has Broken”

Morning Has Broken

1. Morning has broken Like the first morning, Black-bird has
2. Sweet the rain’s new fall, Sun-lit from heaven, Like the first
3. Mine is the sunlight! Mine is the morning Born of the

† Celebration of the Word †

Scripture Reading: Daniel 12:1

A reading from the book of Daniel.

At that time Michael, the great prince, the protector of your people, shall arise. There shall be a time of anguish, such as has never occurred since nations first came into existence. But at that time your people shall be delivered, everyone who is found written in the book.

The word of the Lord. Thanks be to God.
Reflection

Sung Response: “In the Sight of the Angels”

IN THE SIGHT OF THE ANGELS

Steven A. Bell, CSP, and Ricky Manalo, CSP

Refrain: All

In the sight of the angels I will sing your praises,

O Lord! In the sight of the angels you are robed

in righteousness, O, you are robed in righteousness!

Text based on Psalm 138. Text and music © 2015, Steven A. Bell, CSP, and Ricky Manalo, CSP. Published by OCP. All rights reserved.

Scripture Reading: Tobit 12:6

A reading from the book of Tobit.

Raphael called the two of them aside privately and said to them: “Bless God and give him thanks before all the living for the good things he has done for you, by blessing and extolling his name in song. Proclaim before all with due honor the deeds of God, and do not be slack in thanking him.

The word of the Lord. Thanks be to God.

Reflection

Sung Response: “In the Sight of the Angels”
The Lord's Prayer

Let us pray the prayer that Jesus taught us...

Our Father
who art in heaven
hallowed be thy name.
Thy kingdom come
thy will be done
on earth as it is in heaven.
Give us this day our daily bread
and forgive us our trespasses
as we forgive those who trespass against us.
And lead us not into temptation,
But deliver us from evil. Amen.
Closing Prayer

Let us pray.

O God,
who in your unfathomable providence
are pleased to send your holy Angels to guard us,
hear our supplication as we cry to you,
that we may always be defended by their protection
and rejoice eternally in their company.
Through our Lord Jesus Christ, your Son,
who lives and reigns with you in the unity of the Holy Spirit,
God, for ever and ever. Amen.

Closing Blessing

The Lord be with you.
And with your spirit.

May almighty God bless you,
the Father, † and the Son, and the Holy Spirit.
Amen.
Session 3

Stewardship of Financial Resources
Session 3

STEWARDSHIP OF FINANCIAL RESOURCES

As good stewards, we responsibly and ethically care for the people and things entrusted to us. In this session we will dive deep into how the Church manages its financial resources. We will explore financial best practices and benchmarks — including training in both — and address standardized and more regular financial reporting and benchmarks. We will discuss how to establish long-term financial stability as well as how to leverage and strengthen the Church’s assets.

SPEAKERS

Elizabeth Jensen | CFO, Roman Catholic Diocese of Orange

Elizabeth Jensen is a Certified Public Accountant and the Chief Financial Officer of the Roman Catholic Diocese of Orange. She started her career at PricewaterhouseCoopers LLP, where she was an audit senior manager, with clients in the retail, entertainment, and non-profit industries. During her tenure at the Diocese of Orange, Elizabeth has served on the Bishop’s Episcopal Council and Leadership Team and has been responsible for driving the Bishop’s strategic initiatives in finance and stewardship for the Diocese. She is also the Chair of the Audit Committee for the California Conference of Catholic Bishops and the Chair of the USCCB Accounting Practices Committee. Elizabeth lives in Orange County with her three daughters.

Matthew Manion | Faculty Director, Center for Church Management, Villanova University

Matthew Manion is a Professor of Practice in the Department of Management and Operations and the Faculty Director for the Center for Church Management in the Villanova University School of Business. His responsibilities include the Master of Science in Church Management degree, part of the #5 ranked online graduate business degree program by U.S. News and World Report, the Certificate in Church Management programs, and research and writing on relevant church management issues. He has appeared in the New York Times, the Washington Post, the BBC, and numerous church media outlets. He teaches both undergraduate and graduate students and his courses include Organizational Management; Global Business Ethics; Leadership Ethics and Catholic Social Thought; Team Leadership and Group Dynamics; and Pastoral Strategic Planning.

Prior to joining Villanova, Matt was a Strategic Business Unit Director for the Franklin Mint and was responsible for a $100 million line of diecast collectible cars. He also spent 18 years with the Catholic Leadership Institute and served as President and CEO for 13 years, growing it from a local all-volunteer organization with $15,000 a year in revenue to an international leadership training and consulting organization with 26 full-time employees and $6.1 million in annual revenues. Matt has a B.S. in Economics from the Wharton School of Business at the University of Pennsylvania and an MS in Church Management from Villanova University. He and his wife, Kerri, live outside of Philadelphia and have three teenage children. A member of the Penn Track Team in college, Matt still enjoys running and has completed 8 marathons and an Ironman triathlon.
Jim Perry | Co-Founder, Madison Dearborn Partners

Jim is a retired private equity investor who, with Molly, his wife, created the Altum Fund, a family charitable enterprise focused on supporting Catholic education, Catholic charities assisting the poor and vulnerable, and Catholic culture and evangelization. Jim stepped down as chair of the School Board of the Archdiocese of Chicago in November 2017 to oversee Empower Illinois, a scholarship granting and advocacy organization responsible for the passage of the Invest in Kids Act, a tuition tax credit program that has since raised more than $200 million since 2017 for tuition assistance to low income families desiring a private education for their children. In 2012 and 2017, Jim and Molly co-chaired To Teach Who Christ Is, the Archdiocese's capital campaign for education that raised commitments of more than $400 million. Jim also sits on the Finance Council of the Archdiocese of Chicago. Jim served as a board member of Catholic Relief Services between 2003 and 2009 and now serves on the CRS Foundation Board. The Perry’s provided start-up capital and ongoing financial support for Madonna House, a family shelter in Wrigleyville managed by Catholic Charities. The Perry’s support several Chicago inner city development efforts, including Sunshine Enterprises, Familyhood and Together Chicago.

Jim and Molly co-chair the Fellowship of Catholic University Students $250M To Run as to Win capital campaign, designed to help FOCUS double its presence on college campuses to 250 by 2022. They were founding funders of Bishop Robert Barron’s Catholicism documentary series, and Jim sits on the board of Bishop Barron’s WordOnFire digital media platform. Jim is a member of the board of directors of the Lumen Christi Institute, affiliated with the University of Chicago, which organizes symposia, lectures and other programs in support of Catholic thought and scholarship, and is a founding investor of the Collegium Institute at the University of Pennsylvania, his alma mater.

Patrick Markey (Moderator) | Managing Partner, Leadership Roundtable

Patrick Markey, CPA, MBA serves as managing partner of Leadership Roundtable. Before joining Leadership Roundtable, he spent seven years as Executive Director of the Diocesan Fiscal Management Conference (DFMC). The DFMC is the association of Catholic diocesan finance officers for the United States and Canada. Besides support and educational opportunities for its members, it offers a unique certification in diocesan financial management.

From 2003 to 2013, Patrick worked at the United States Conference of Catholic Bishops (USCCB). In 2007, the bishops entrusted him with starting the Office of National Collections, which oversees nine of the 13 national collections held in almost 18,000 parishes annually. His work involved creating more efficient and cost-effective fundraising and grant making procedures as well as starting and developing the Solidarity Fund for the Church in Africa. The USCCB National Collections Office raises more than $90 million per year, which it distributes through targeted grant programs.

Before heading up national collections, Patrick worked many years of his career as an executive in Catholic publishing, including five years at the USCCB. His early professional years were in investment banking. He is a Certified Public Accountant and holds an executive MBA degree from the University of Loyola in Baltimore. He also has done other graduate studies in theology at Fordham University. He has served many organizations including six years as a regional director of the Focolare Movement and on the boards of the Catholic Volunteer Network, the Center for Ministry Development, New City Press, and the John 17 Movement. He is a consultant to the USCCB’s Committee on National Collections, Subcommittee on the Church in Africa, and Subcommittee on Aid to the Church in Central and Eastern Europe. His volunteer work has largely focused on ecumenism and leadership development, especially youth and young adult faith formation.
Breakout Group Discussion Guide

SESSION 3: STEWARDSHIP OF FINANCIAL RESOURCES

As good stewards, we responsibly and ethically care for the people and things entrusted to us. In this session we will dive deep into how the Church manages its financial resources. We will explore financial best practices and benchmarks — including training in both — and address standardized and more regular financial reporting and benchmarks. We will discuss how to establish long-term financial stability as well as how to leverage and strengthen the Church’s assets.

In Your Breakout Group

1. Drawing from the panel presentation, the questions and recommendations provided below, and your own experience, consider actionable recommendations that you think are most necessary and will make the most impact.

2. Dialogue with those in your breakout group and prioritize, in order, the top four recommendations.

During this small group breakout, you will engage in a dialogue with fellow participants on the theme of the third session: Stewardship of Financial Resources.

As with the first two sessions, the fruits of our discussion and discernment will be action. To help inspire our conversations to produce actionable solutions, we have compiled the following questions and recommendations. The facilitator of your breakout group will use these to guide the conversation and a scribe will capture the comments and results to report back to the larger group and include in the final Summit report.
Reflection Questions

1. What are the top three changes needed now within the Church to ensure ethical financial practices?

2. How can the wider Church support and promote the recommendations of the Coalition on Ethical Financial Management in the Church, the joint effort of national organizations to create a unified response to the financial crisis in the Church?

Recommendations

National Approach to Ethical Financial Leadership

- Expand the membership and reach of the Coalition on Ethical Financial Management in the Church, including a diverse range of leaders from multiple disciplines.

- Create a network of diocesan finance council chairs and lay staff to engage lay Catholics as chief collaborators with bishops on budgeting and finances.

- Commission a study of all recent financial scandals, as well as diocesan bankruptcies, discerning the financial and moral lessons that can be derived, and preventing future crises.

Best Practices

- Develop, promote, and encourage the adoption and implementation of standardized financial and accounting best practices for dioceses and other Church entities.

- Establish benchmarks that assist and support transparency, accountability, and ethical behavior in Church stewardship of resources.

- Create key performance indicators to evaluate and compare diocesan performance and build a central repository for resources being developed and/or used to support these efforts.

- Create an online leadership portal where the benchmarks and key performance indicators can be consistently updated and utilized.

- Ensure that budgets and financials are transparent and accountable at all institutional levels of the Church and reflect Gospel priorities.
Session 4
Stewardship of Potential
Session 4

STEWARDSHIP OF POTENTIAL

For Church leaders, it is important to recognize and take proper care of the potential at hand — the expertise, creativity, and diversity of its people, together with investments, property, and the generosity of Catholics. In this session, we will discuss the many assets of the Church and how the Church can utilize those assets to strengthen the financial health of the Church.

SPEAKERS

Sister Nathalie Becquart, XMCJ | Under-Secretary to the General Secretariat of the Vatican Synod of Bishops

Nathalie Becquart is a 51-year-old French Catholic religious sister and member of the Congregation La Xavière. From 2008 to 2018 she led the National Service for the Evangelization of Youth and for Vocations (SNEJV) within the Bishops’ Conference of France. In May 2019, she was appointed Consultor for the General Secretariat of the Synod of Bishops. Nathalie Becquart was born in 1969 in Fontainebleau (France). She joined the Xaviers sisters in 1995 after a year of volunteer work in Lebanon and two years of professional experience as a Marketing-Communication consultant. She took her first vows in "La Xavière" in 1998 and her final vows in 2005. La Xavière is an apostolic religious congregation of Ignatian spirituality which celebrates its centennial of foundation this year.

Sr. Becquart graduated from HEC School of Management, Paris in 1992, with a master in Entrepreneurship, and she obtained a double canonical baccalaureate degree in philosophy and theology in 2006 from the "Centre Sèvres-Facultés Jésuites de Paris", supplemented by training in sociology at the EHESS (2004-2006). She is just completing a canonical Licentiate in Theology at Boston College School of Theology and Ministry (specialization in ecclesiology with a research on synodality). She spent nearly 30 years in youth ministry and is a specialist in youth issues, youth evangelization and vocation ministry. She held various responsibilities in the service of youth and young adults. In 2012, she was the first woman to be appointed as the Director of the National Service for the Evangelization of Youth and for Vocations within the French Bishops’ Conference after being the Deputy Director of this service from 2008 to 2012 in charge of university pastoral care.

From 2015 to 2018, called by Bishop Michel Aupetit, she was a member of the Episcopal Council of the Diocese of Nanterre. Her ten-year mission at the French Bishops’ Conference have led her to become involved at the European level - through the meetings of the CCEE (Council of European Bishops’ Conferences) and the European Vocations Service, of which she was vice-president from 2016 to 2018 - and at the international level (organization of WYD, participation in international meetings and congresses in Rome, etc.). She was particularly involved in the preparation of the Synod of Bishops on “Youth, Faith and Vocational Discernment” in France and at the Vatican as General Coordinator of the March 2018 Youth Pre-Synod and as an auditor at the October 2018 Youth Synod.
Amy Rauenhorst Goldman | CEO and Chair, GHR Foundation

Amy Goldman is CEO and Chair of GHR Foundation, a hope-fueled global funder of service to people and their limitless potential for good.

Amy steers the foundation’s direction with optimism and a background in diplomacy and social investment that has inspired new approaches to philanthropy. Under her leadership, GHR elevates powerful movements of faith and inter-faith actors for community-led development; implements systems change strategies across public, private and faith sectors to keep children in families; unlocks significant funding from industry and government to prevent Alzheimer’s dementia and is launching new collaborations with Black, Indigenous and people of color-led organizations to address racial inequities.

Amy serves on Georgetown University’s board of directors and Walsh School of Foreign Service board of advisors and is a trustee and vice chair of the board for the University of St. Thomas in St. Paul, Minnesota. She is also a member of Opus Holding board of directors, Visitation School board of trustees (chair), Jesuit Refugee Service International Development Group, Mayo Clinic Leadership Council, and Council on Foreign Relations.

Amy previously served as a lead consultant for Washington D.C.-based International Trade Services, where she conducted trade negotiations and crafted investment strategies for global corporate clients. She holds a master’s degree in political science from the University of California at Berkeley, a master’s degree in law and diplomacy from Tufts University Fletcher School of Law and Diplomacy, and bachelor’s degree in foreign service from Georgetown University.

Kelli Reagan | Research Associate, Catholic Social Teaching, Center for Social Concerns, University of Notre Dame

Kelli Reagan Hickey is a research associate in the Catholic Social Tradition at the University of Notre Dame’s Center for Social Concerns. Together with Clemens Sedmak, she manages a research project that investigates the intersection of Catholic Social Teaching and financial decision-making. In addition to discerning practical applications for Catholic Social Teaching, her research interests include Christian social ethics, economics, and character development. She graduated with a B.A. in Economics from Yale University and earned her M.S. in Management from Notre Dame’s Mendoza College of Business.

Louis Damani Jones (Moderator) | Program and Mission Alignment Coordinator, Catholic Urban Programs

Louis Damani Jones is the Program and Mission Alignment Coordinator for Catholic Urban Programs, a social ministry of the Diocese of Belleville, IL. He is a graduate student of clinical social work, as well as a fellow at the Gephardt Institute for Civic and Community Engagement. He received 2020 Cardinal Bernardino Award for New Leadership from the United States Conference of Catholic Bishops.
For Church leaders, it is important to recognize and take proper care of the potential at hand — the expertise, creativity, and diversity of its people, together with investments, property, and the generosity of Catholics. In this session, we will discuss the many assets of the Church and how the Church can utilize those assets to strengthen the financial health of the Church.

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2. Dialogue with those in your breakout group and prioritize, in order, the top four recommendations.

During this small group breakout, you will engage in a dialogue with fellow participants on the theme of the fourth and final session: **Stewardship of Potential**.

Again, the fruits of our discussion and discernment will be action. To help inspire our conversations to produce actionable recommendations, we have compiled the following questions and recommendations. The facilitator of your breakout group will use these to guide the conversation and a scribe will capture the comments and results to report back to the larger group and include in the final Summit report.
Reflection Questions

What opportunities are provided by the global synodal process the Church is undertaking? How can you, your parish and your diocese actively participate?

Recommendations

Synodal Church

- Launch a nationally coordinated synodal process in the United States using the Fifth Encuentro as a model, with gatherings at the small group, parish, diocesan, regional, national, and continental levels to respond to Pope Francis’ call for journeying together.
- Create associations, networks or partnerships among dioceses, parishes, and ministerial organizations to share resources and collaborate on common concerns.
- Establish structures and channels of communication to involve a wider circle of people who are affected by decisions to participate in dialogue and the decision-making process.

Financial Assets

- Develop a permanent, independent source of emergency funding and long-term financial support for Catholic ministries in the United States.
- Establish a system-wide effort to leverage economies of scale, provide seed capital for strategic development, and develop a pooled investment initiative.
- Assess the utilization of Church-owned properties and establish a vehicle for possible sharing of underutilized property.
Closing Prayer

Sept. 29, 2021
† Gathering †

Welcome

Archbishop José Gomez
Archdiocese of Los Angeles
U.S. Conference of Catholic Bishops

Call to Prayer: Send Down O God

Send down, O God, upon your people
Words of fire to proclaim your glory.  

Send down, O God, upon your people
Songs of justice to sing in every land.  

Send down, O God, upon your people
Shouts of righteousness to ring out in every place.  

Send down, O God, upon your people
Oils of gladness to strengthen faith in every heart.  

Send down, O God, upon your people
Winds of knowing to kiss every body and soul.  

Send down, O God, upon your people
Hands of healing to mend every broken heart.  

Send down, O God, upon your people
Hearts burning with the fire of your love.  

Send down, O God, upon your people:
the power, the authority and the joy of your Holy Spirit.  

Whose boundless love gathers us beyond time and space.
Opening song: “Boundless Love”

Boundless Love / Tinh Chúa Cao Vời

Refrain
Far beyond the reach of endless sky, far beyond

Boundless love was promised as your vow, a promise

Boundless love, receive my hum-ble life, receive my

From an cient time; that your love would be mine. Be-

Can’t comprehend all my days; that I may know your ways. My

Chúa muốn đời, Người yêu con nên ban tinh Cha. Đứ

Chúa hiện thân mình, dế nernen tôi lòng dó của Chúa, và

Storms were designed, be-fore the song shall travel near and far to claim the

Heav ens were a ligned, your sweet voice a wakened my name. You

Beautiful who shall fear? You enfold me in your embrace. The

That you are; words of truth and love are sown; that

Guía tranh gian, on Chúa ngày đến áp ủ con. Vì

Ly của Chúa, gieo rắc Lời Chúa khắp gian xa. Rồi

found me in my shame and called me out of my pain.

Vì, Most High, a lone are source and cor ner-stone.

Chúa quen thân mình, dôi con dân mở gi hồn.

D.C.
In the name of the Father, †

Peace be with you. And with your Spirit.

As we come to the end of our Summit,
let us pray that God will journey with us
to co-create a world that God dreams of:
where the stewardship of Church finances and assets,
the better care of people,
the rebuilding of trust,
and the harnessing of everyone’s potential
are all at the service to the Church’s mission!

Prayer¹

Let us pray.

God of Our Journey,
as we gather together
we lift up our voices
to give praise and thanksgiving to your name,
the God of all encounters,
who, by the power of the Holy Spirit,
makes us one in Christ, our Savior.

God of Our Journey,
as we journey together with Christ, your Son,
who walks alongside of us day by day,
may we embrace your presence within us
and discover your presence in the people
whom we encounter along the way.

God of Our Journey,
as we journey together in the power of the Holy Spirit,
enlighten our minds and our hearts
in our encounters with one another and with all peoples,
so that we may become better listeners
and fruitful bearers of your Word among us.

¹Journey Together Prayer © 2020 United States Conference of Catholic Bishops
https://www.usccb.org/committees/cultural-diversity-church/journey-together-prayer
God of Our Journey,
as we journey together with all members of the Body of Christ,instill in us the presence of your love and compassion,so that we may persevere in faith,trust in your goodness,and place all our hope in you.

God of Our Journey,as we journey together as disciples of Christ,set our missionary hearts ablazeand transform our lives by your grace,so that we may go forth into the worldto proclaim the Good Newsand to build up the reign of your lovethrough our acts of justice, compassion, and mercy.

We ask this through your Son, Our Lord Jesus Christ,who, by the power of the Holy Spirit,brings forth a world of harmony and peace,God, for ever and ever. Amen.

Blessing
The Lord be with you. And with your spirit.

Almighty Father,you are lavish in bestowing all your gifts,and we give you thanksfor the favors you have given to us.In your goodness you have favored usand kept us safe in the past.We ask that you continue to protect usand to shelter us in the shadow of your wings.We ask this through Christ our Lord. Amen.

And may the blessing of almighty God,the Father † and the Son and the Holy Spirit,come down on you and remain with you forever. Amen.

Dismissal
Our summit has ended.Go and announce the Gospel of the Lord.Thanks be to God.
THANK YOU

A special thank you to all of those who led us in prayer:

Presiders

Cardinal Joseph Tobin, CSsR
Archbishop José Gomez

Readers

ESTEEM site leaders, alumni, and friends
Elisabeth Román
Sr. Sharon Euart, RSM
Sr. Carol Zinn, SSJ
Sr. Mary Bendyna, OP
British Robinson
Kathleen McChesney

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Leadership Roundtable Services and Programs
Our Vision and Values

VISION

Leadership Roundtable is working with Church leaders to institutionalize the following for the Catholic Church in the U.S. in order to restore trust and credibility in the Church and its leaders.

- Public performance standards in key areas of management, finance, human resources, and communications to improve practices and functions.
- Greater participation of laity, particularly women, in senior management of Church institutions.
- A methodology for developing the next generation of leaders, lay and ordained, whereby those selected for key leadership and management positions have the professional skills to succeed.
- A variety of internal and external evaluative means to ensure the established performance standards are measured and to provide increased transparency and accountability.

VALUES

Leadership Roundtable is composed of faithful Catholics, called by the Holy Spirit and thinking with the Church, who put themselves at its service. We value:

- Transparency
- Co-Responsibility
- Accountability
The Mission Management Model is a system-wide approach for Catholic dioceses and other Catholic institutions to achieve management and leadership excellence in service of their mission. Its six stages provide an assessment and customized plan that draws upon Leadership Roundtable’s suite of services in order to assist Catholic leaders in creating a vibrant Catholic experience for the people they serve.

Our Mission Management Model is built on years of experience that show us that small steps are the building blocks for transformative change. At the pace they choose, dioceses move through the six stages — assisted by their trusted partner, Leadership Roundtable. One of the keys to success is for the diocese to only take on as much as is realistic for them to do at any given time. While the time frame for achieving stage six varies, each diocese is encouraged to focus on achieving continuity of progress in manageable periods. Ongoing evaluation of progress and benchmarking built into the Model allows dioceses to see how far they have come and to see the impact of their work on their mission.
6 STEPS OF THE MISSION MANAGEMENT MODEL

1. AWARENESS
The journey begins when diocesan leaders recognize the need for change. They may encounter resistance that limits effective action. There may be inconsistency between how diocesan leaders want to handle temporal management - such as accounting practices, parish fundraising, or communications - and how it is actually done. There may be growing awareness that the way parishes and dioceses are being managed is hurting the overall mission of the local Church.

2. START
Diocesan leaders begin to take steps to address the dissonance between current practice and desired practice. It may include false starts and a variety of uncoordinated attempts at solutions. There is action, but without the four key elements of effective change management: 1) a clear plan that is understood by all involved, 2) structures, 3) skills, and 4) models to carry it out.

3. PLAN
Diocesan leaders clearly state the desired outcomes for management and leadership practices in the diocese and parishes and develop a comprehensive roadmap for progress. The plan includes a clearly articulated vision, benchmarks for progress, specific strategies, action steps, timelines, and accountability.

4. IMPLEMENT
Leaders at various levels of the diocese implement the roadmap with coordinated effort: timelines are met, metrics applied, and resources allocated. There is ongoing oversight and a systematic means for evaluating impact on a regular basis.

5. EMBED
By this stage, best practices is an intrinsic value to the bishop and a critical mass of other diocesan and parish leaders. This value is clearly articulated and is embedded in expectations of all employees. The diocese has reached a turning point in its systems, policies, and procedures, and has allocated sufficient financial and human resources to ensure sustainability of best practices.

6. THRIVE
At this stage, a diocese has met its goal to systemically embed best practices from diocesan offices to parishes to its extensive ministries. It is time to plan for the future of the diocese on a foundation of managerial excellence and a flourishing mission.

Providing Catholic institutions with a ROADMAP FOR INTEGRATING BEST PRACTICES into their mission
Engaging Students to Enliven the Ecclesial Mission (ESTEEM) develops the capacity of college students to take leadership roles in parishes after they graduate. The program trains, encourages, and supports young adults at colleges and universities in their baptismal call to use their gifts and talents in service to the Church.

Currently, the program serves a broad diversity of students on both public and private campuses across the United States. Leadership Roundtable is committed to working with our partner, the Saint Thomas More Catholic Chapel and Center at Yale University, to expand ESTEEM’s reach and staffing capacity.

Learn more about ESTEEM by visiting: esteemlead.org.
The Latino Pastoral Leaders Initiative is a new service of Leadership Roundtable, generously funded by Lilly Endowment Inc. and other donors. The initiative works to increase access to critical leadership development and pastoral management training, coaching, peer support, and mentorship for Hispanic/Latino Catholic pastoral leaders—lay, religious and clergy. The Latino Pastoral Leaders Initiative seeks to build better capacity for a new culture of leadership, as well as respond to the key priorities identified at the conclusion of the V National Encuentro for Hispanic Ministry, the promotion of best practices in Church management and the development of leadership formation among Hispanic/Latino leaders.
The Toolbox for Pastoral Management is a comprehensive introduction to the key elements of pastoral leadership and management, intended for priests and lay pastoral leaders. This residential program covers essential management topics critical to the pastoral role. Participants engage in a series of presentations that provide practical, ready-to-use tools for the busy pastoral leader. Prayer, the sacraments, and fellowship round out this initiative. The Toolbox for Pastoral Management is a formational and educational process that attends fully to each participant as an individual. It is customized for each new group of participants.

The Toolbox for Pastoral Management — Advanced Level is the next step for experienced pastors and pastoral leaders seeking to further sharpen their skills in ministry. Through a seminar-style format of adult learning, sessions permit rigorous, in-depth engagement with the topical material divided into three areas: Strategy for Ministry, Managing People for Ministry, and Managing Operations for Ministry.
Catholic Leadership 360 is a leadership development program that offers priests and lay leaders fresh insight into their effectiveness as leaders in the Church. The program provides a unique opportunity for growth in leadership using respectful, structured feedback from those with whom clergy and lay leaders interact regularly. Leadership Roundtable partnered with the National Federation of Priests’ Councils and the National Association of Church Personnel Administrators to develop two 360-degree assessment tools, one for clergy and one for lay leaders, available in English and Spanish. The Catholic Leadership 360 Assessments are inspired by In Fulfillment of Their Mission: the Duties and Tasks of a Roman Catholic Priest and by the National Certification Standards for Lay Ecclesial Ministers. Leadership Roundtable also provides individual or group coaching to participants after the Catholic Leadership 360 program as they move toward the goals they prioritized in their development session.
Leadership Roundtable convenes bishops to provide customized workshops on topics of leadership and management in their dioceses. These sessions provide a forum for bishops to come together to discuss pressing issues, intended to be both practical and solution-focused. These workshops can be for new bishops, for a Province or Region, on a particular crisis facing the Church, or can include a bishop’s senior lay executive leaders. National subject matter experts and Church leaders offer their insights. Bishops and their senior leaders participate in facilitated small discussion groups where participants apply the topics to their own specific situation. An integration session identifies specific action steps for implementation in the particular diocesan context.

A sample of the topics addressed at these forums include: Best Practices in Diocesan Planning and Change Management; Empowering Parishes as the Mission Delivery Point; Identifying and Keeping the Right People in the Right Place; How to Restore Trust in Your Diocese After a Crisis: What it looks like and how to get there?; Emerging Best Practices in Accountability and Leadership Co-responsibility; Bishop’s Appeals - What Works and What The Data Tell Us; The Importance of Planned Giving to Your Diocese and to Catholic Philanthropists.
THANK YOU

for attending the

2021 Catholic Partnership Summit

Your dedication to the Catholic Church is inspiring! Thank you for all you do to help build a healthy and thriving Church.

Save the date for the 2022 Catholic Partnership Summit on Sept. 22-23, 2022

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In partnership with lay, ordained, and religious leaders and organizations across all sectors of the Catholic community in the United States and Rome, Leadership Roundtable seeks to elevate and implement best practices in management and leadership to establish a culture of co-responsible, servant leadership for a healthy, thriving Church in the U.S.