

The National Leadership Roundtable on Church Management

FROM ASPIRATIONS TO ACTION:

Solutions for America's Catholic Schools

2011 Annual Meeting



June 22-23, 2011 Georgetown University Washington, DC

www.TheLeadershipRoundtable.org/AnnualMeeting



Archbishop Joseph E. Kurtz

*of the Archdiocese of Louisville celebrates Mass
during the Leadership Roundtable's 2011 Annual Meeting
inside Georgetown University's Dahlgren Chapel.*

For photos, videos, and information about the 2011
Annual Meeting, visit www.TheLeadershipRoundtable.org/AnnualMeeting

    www.TheLeadershipRoundtable.org

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This publication is a synthesis of wisdom, comment and reflection by some of the most committed and ardent supporters of Catholic schools in the US.

In June 2011 the National Leadership Roundtable on Church Management gathered a select group of leading supporters of Catholic schools at Georgetown University for two days to provide action-oriented recommendations about Catholic schools. It was a gathering of thought leaders from a diverse set of backgrounds, deliberately crossing boundaries of fields of expertise and influence so that the problems facing Catholic schools today would receive attention from combinations of people never before gathered on behalf of Catholic schools. The strength of the gathering lay in the diversity of backgrounds of the people involved. Included is a synopsis of their work, designed to offer to the leaders of Catholic schools in the country some fresh thinking easily translated into action steps.

Mary Claire Ryan



OPENING PRAYER

Mary Claire Ryan

Executive Director

NativityMiguel Network of Schools

Let us pray. In the warmth of your holy presence, God, on this first full day of summer here in our nation's capital, we are gathered, all of us, bankers, scholars, lawyers, educators, priests, CEOs, superintendents, sisters, women and men of faith. We are gathered to offer the beauty and wisdom of different talents and different works, to offer these gifts for the great task at hand. Convened by your faithful laborers of the National Leadership Roundtable, we know we are grounded together in mystery, in the mystery of your love dynamically at work in us and among us. Bless our aspirations. Bless our actions. Lead us in faith. Lead us to solutions for our task at hand. Open our hearts to know for whom we labor at this meeting. Inspire us with courage and above all, the confidence to know that our work together can and will bear great fruit. Glory be to God whose power working in us can do infinitely more than we can ask for or imagine. Amen.

INTRODUCTION TO THE ANNUAL MEETING

Kerry Robinson

Executive Director

National Leadership Roundtable
on Church Management

It is wonderful to see so many friends and colleagues here today. It is my privilege on behalf of the board of directors of the National Leadership Roundtable on Church Management to welcome you to this important meeting. For those of you who are new to the Leadership Roundtable, you will gain an insight over the course of these two days into many of the defining qualities and guiding principles that inform all that we do in service to the Church.



Kerry Robinson

The annual meeting of the Leadership Roundtable provides an occasion to accomplish two objectives. The first is to account for the activities and progress over the past year, and the second is to focus on a particular challenge facing the Church in the US with a view to making a positive, concrete, practical contribution toward a solution.

In past years, we have addressed our core areas of expertise, all of which are always in the temporal and never doctrinal realm: management, finances, human resource development, and communications. Last year, we took up the twin crises adding unusual strain to the Church: the experience of the sexual abuse crisis in Europe and the global economic crisis.

This year is unique in at least one respect: we were asked by bishops, our members, philanthropists, and leaders in Catholic education to address the growing threat to the sustainability of Catholic school systems and to play a role in contributing to a national

response. We took this invitation very seriously and considered the ways that we might be able to make a unique contribution. As you can imagine, a network comprised of senior executive leaders is not fond of duplicative efforts, inefficient redundancies, or too exclusively academic an approach to a problem. I doubt frankly that we would have chosen this theme on our own, but we do listen, listen attentively, to bishops, senior diocesan leaders, and our members. And we are nothing if not responsive. As our board deliberated, we concluded that the best way we could make a meaningful contribution in this area is to play to our strengths: our ability to convene brilliant minds from diverse perspectives and our laser focus on action-oriented outcomes.

Our goal is to create a blueprint set of recommendations of immediate next steps to address the challenge of saving Catholic school systems. We convened experts in the field to help plan this gathering and we heard from them that they often attend conferences on the subject of Catholic education. They are inspired and edified, but sometimes little in the way of action or follow-up occurs. This is clearly not a criticism of those important, in fact, seminal conferences. It is simply an observation our advisors made to us to turn this into a series of working groups attending to each of 10 core components of the challenge, an appeal to the brainpower assembled to strategize on concrete recommendations. Simply described, there is so much good work at hand, so many success stories to share, so many best practices tried and tested, and so many good observations shared at important recent conferences, such as those held by the Philanthropy Roundtable, FADICA, Notre Dame, Boston College, and others. Our task is to gather and harness all of the collective school assets in one place, so that a Catholic schools leadership czar can, for example, go to the president of the United States and say, “Here is what the Catholic school system brings to the field of education in the US. Here are the consequences if we allow the Catholic school system to be dismantled, and here is what is needed in order for it to be sustained and to thrive.”

ACTIVITIES AND ACCOMPLISHMENTS: Achievements of the Leadership Roundtable

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

Rev. Edward A. Malloy, CSC, President Emeritus, University of Notre Dame

Victoria Reggie Kennedy, Trustee, National Leadership Roundtable on Church Management

Geoffrey T. Boisi, Chair and CEO, Roundtable Investment Partners, LLC

Kerry A. Robinson

Executive Director

National Leadership Roundtable on Church Management

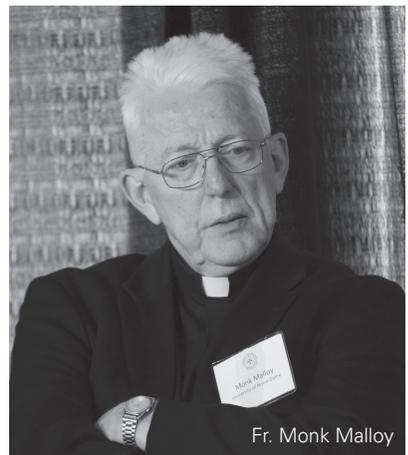
One of the reasons for gathering is to give an account of the services and activities of the Leadership Roundtable over the past year. Next month, we commence our seventh year of service to the Church, championing best managerial practices, helping to solve contemporary temporal challenges facing Church leaders, advocating for effective utilization of the gifts of all members of the faithful, especially the laity, and emulating the Church we want to see. It has become our custom at this gathering to provide an account of how we have cared for the financial and intellectual contributions our 200 executive leaders have shared so generously in support of our mission. It is important that we are accountable to you, and in addition to updating you on the progress of our work plan, it is important that we have the chance to benefit from your candid feedback and counsel.

Rev. Edward Malloy, CSC

President Emeritus

Notre Dame University

The Leadership Roundtable continues to expand its response to the leadership and management challenges facing the Church. In particular, these last 12 months have seen greatly expanded demand for our services and broader implementation of our programs and



Fr. Monk Malloy

resources. The strategic plan calls for us to expand our resources and strengthen our governance so that we can respond to this unprecedented demand.

I am honored to be co-chair of the development committee along with Chuck Geschke, and we are also grateful to Betsy Bliss and Fr. Donald Monan, who are helping us in our work. In addition to development, we are organizing a governance committee and expanding the finance committee to allow for continued development of the organization. We are quite grateful to our board and council members, our donors, and our friends for their continued support.

Catholic Standards for Excellence

I'd also like to report on Catholic Standards for Excellence. This program remains our foundational initiative for dioceses, parishes, religious communities, nonprofits, Catholic charities, colleges and universities, and schools. To date, we have a total of 361 Partners in Excellence throughout the country at various stages of implementation of the Standards code and we plan to sign on 5 new dioceses by the end of the year. Over 11,000 copies of the Standards for Excellence codes have been distributed. Within the last quarter, we have added 5 new Partners in Excellence, including DePaul University, the largest Catholic university by population in the country, and Xavier University of Louisiana. We continue to work with three religious communities, including the Paulist Fathers. In the Archdiocese of St. Paul and Minneapolis, the parish business managers have introduced the Standards for Excellence, and in the fall they will host a series of meetings with pastors, pastoral staff, and pastoral council members to implement the Standards in 130 parishes across the archdiocese.



We have also initiated exciting partnerships to develop online assessment and reporting tools, a webinar series, training courses and other opportunities. Our 360-plus Partners in Excellence are already downloading free education resource packets, which provide templates, tools, sample policies, and other resources to support best practices in all areas of parish and organization management. The Standards for Excellence have been featured in a Fordham University course on entrepreneurialism, as well as the Church management course at Villanova University. Our partners at the Standards for Excellence Institute have also conferred the Seal of Excellence on two diocesan Catholic charities indicating full compliance with the Standards' benchmarks. Some of our other Partners in Excellence are also pursuing that designation, which is not easily granted. We are

particularly grateful to a Catholic foundation that wishes to remain anonymous and to our many generous individual donors who have provided funding for the Standards program during this past year.

ESTEEM

ESTEEM—Engaging Students to Enliven the Ecclesial Mission—is a nation-wide program to develop leadership skills of young Catholics. Applying a multifaceted approach, ESTEEM provides college students with the inspiration and tools for deeper engagement in the life and witness of the Church.



An initiative of the Leadership Roundtable and St. Thomas More Catholic Chapel and Center at Yale University, ESTEEM focuses on the core competencies of spirituality, education, community and service. It has completed its highly successful pilot year on 6 campuses: Yale, Sacred Heart University, The Ohio State University, Michigan State, Stanford and UCLA. A capstone conference took place April 1-3 at St. Thomas More Catholic Center at Yale, which included students and campus ministers from the pilot sites. Valuable feedback to strengthen the program was obtained from that meeting. ESTEEM enjoyed national publicity in a featured article in *The New York Times*. We anticipate all 6 pilot sites continuing this year and expect the addition of 6 new sites.

Victoria Reggie Kennedy

National Leadership Roundtable
on Church Management

Catholic Leadership 360

Catholic Leadership 360 is a unique leadership development process designed for ordained and lay leaders in the Catholic Church. After completing Catholic Leadership 360 with priests and lay leaders in the Dioceses of Pittsburgh and Metuchen, we saw significant expansion this year in Boston. Cardinal Sean O'Malley invited the Leadership Roundtable and our partners in Catholic Leadership 360 to work with a cohort of young priests who had been ordained for three to 6 years.



As priests are being put into leadership positions earlier and earlier, leadership training is more important than ever. So Cardinal Sean and his vicar for clergy, Rev. Michael Medas, recognized the need for a quality leadership development program: one that assessed the leadership competencies and skills of priests and lay leaders and that



provides a personal development program for each participant. Fifteen priests completed the 360 survey, with 231 raters. Superiors, supervisors, peers, direct reports, and others all participated in rating the priests. These priests attended a feedback workshop to receive their personal report and then prepared for one-on-one sessions with trained facilitators. The facilitators were pastors, formation directors, a deacon, a layman, and a laywoman, and they assisted the participants to interpret their 360 review and identify strengths and development needs.

The final phase of the program guided each participant to create a personal development plan and identify ongoing formation approaches and opportunities. In April, we met with Cardinal Sean, the regional bishops, and senior leaders in the Archdiocese of Boston. The bishops and formation directors were presented with a group profile of the priests to assist with alignment of future formation opportunities. The Cardinal was grateful for the impact of the program, and we're now in discussions with the Archdiocese about expanding to a new group of laity and priests. That expansion continues across the country as dioceses and institutions show interest in this leadership development program, including the Region 11 councils of priests, which includes the 14 dioceses of California, Nevada and Hawaii.

Leadership Roundtable Communications

The Leadership Roundtable has been featured in *The New York Times*; the *National Catholic Reporter* carried a full-page interview on our Standards for Excellence; and *America* magazine reported on our Toolbox for Pastoral Management. We've greatly expanded our communications with members, bishops, and diocesan leaders through our electronic and printed mailing lists. Our social media platforms are updated several times each week and we introduced a monthly e-newsletter. Our annual report and appeals are distributed nationally. We paid special attention to our logos and promotional materials for all of our products – including Standards for Excellence, Catholic Leadership 360 and ESTEEM to ensure that individual resources are promoted as part of the Leadership Roundtable's menu of products.

Our board members and council members, staff, and subject matter experts continue to be in great demand for national keynote addresses and workshops, diocesan convocations, and other meetings and workshops interested in church management. To give one example, Kerry Robinson was invited to the Diocese of Allentown to address Bishop Barres and the full diocesan staff on the mission, guiding principles and resources of the Leadership Roundtable. The meeting was followed by a keynote to the Catholic Business Owners Alliance of the Diocese for a full overview of the Leadership Roundtable's activities and a challenge to members to lend their own intellectual capital and managerial expertise to the Church and diocese.

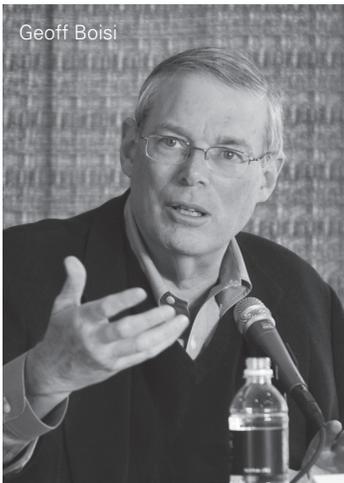
Pastoral Leadership Development

In the last few years, you've heard about two Leadership Roundtable initiatives: The Toolbox

for Pastoral Management and CatholicPastor.org. We are delighted to announce generous funding from the Lilly Endowment, which brings together these two projects

under the umbrella of Pastoral Leadership Development. We have appointed coordinators for each of the projects and we are strengthening the connection between the two components. Our summer 2010 Toolbox was a great success and our summer 2011 Toolbox for pastoral management is fully subscribed with a waiting list. A second Toolbox site is being considered in response to requests for a second location from multiple dioceses.

CatholicPastor.org
LOVE. LEAD. SERVE.



Geoff Boisi

Geoffrey T. Boisi

Chairman and CEO,
Roundtable Investment Partners, LLC

Leadership Roundtable Strategic Planning

For those of us who were here when the Leadership Roundtable was simply an idea on a yellow pad, to see the evolution of the organization in the 7 years has been just an absolutely unbelievable experience in terms of the services, products, acceptance that

we've experienced, the requests that we've had, and the involvement of senior-level people from all walks of life to assist the Church. And that could never have been done without our board, which has been phenomenal, and our council members, all committed Catholics.

This year, we have focused on four goals, the first relating to a governance issue. We want to make sure that as we promulgate the Standards of Excellence throughout the system, that we ourselves are adhering to those things in an absolutely pristine, first-class way. Our second and third goals call for engaging more senior-level executives throughout the system. We are being very tactical and strategic about the types of capabilities that we seek in order to support the needs, questions and issues that have been brought to our attention across the Church. We want to ensure that we have the right talent available to support the problems.

Further, we want to be certain that as we grow as an organization we establish metrics to make sure that this is a growth business and a growth organization. In order to achieve that, we have restructured ourselves a little bit differently. Today, at the board meeting, we approved our latest senior hire, Jim Lundholm-Eades, who has been involved with us from the beginning and is joining us formally within the next month to be the director of services and planning. He and Michael Brough will be going out to dioceses and nonprofits around the country to listen to leaders in those sectors. Jim, in particular, is going to be helping us from an operating standpoint to actualize the execution of the initiatives we are being asked to advance.

We will strengthen our communications over the next year. Hopefully, you have availed yourselves of our website, ChurchEpedia.org, which has been an important development over the last couple of years. It will be expanded, invested in and hopefully used to the benefit of the Church.

As you know, we are committed to strengthening our national presence. We recognize the differences of culture and approaches to problem solving in the different parts of the country, and we want to make sure that we are represented in each region. Part of the new strategic plan is to regionalize our gatherings, broaden the invitation list, secure greater participation, use and endorsement from Church leaders to engage the board and council members and expand the local Catholic executives from different parts of the country. Our gathering in California on October 4th is the first step toward achieving that goal.

Catholic Investment Initiative

Another important activity is developing a Catholic investment initiative. We spent a lot of time, energy, money, and intellectual capital in assembling a Catholic-oriented investment capability plan. This idea includes the notion that consolidating capital by Catholic organizations that have smaller amounts of money will allow Church entities to attract the best money management and advice. The goal is to achieve the kinds of returns that the Harvards, the Yales, the Notre Dames and the Boston Colleges, and the other great institutions of the country have been able to achieve. The idea seeks to grant small and mid-sized Catholic organizations the same results as their larger peers at a very discounted cost. We advocate this plan so that Catholic entities will be able to get these returns at a lower cost, because the pools of capital will be treated as one Catholic investor.

Congress for Pastoral Leadership

We recently received an invitation to cosponsor the inaugural Mid-Atlantic Congress for Pastoral Leadership, an East Coast version of the L.A. Religious Education Congress, offering Catholic pastoral practices, religious education and opportunities for skills development. The sponsors include the Archdiocese of Baltimore and the Association of Catholic Publishers. We were asked to cosponsor the congress for three reasons: the first is our ability to reach a wide Church audience; the second is our ability to provide content and best temporal practices; the third is our network's access to prominent speakers. We are very pleased and honored to be considered for this. Discussions have already taken place with the organizers of the Congress for the Leadership Roundtable to run workshops on the Standards for Excellence and Catholic Leadership 360. The Congress will take place March 8-10, 2012, in Baltimore.

Impact in the Church

Just within the last two weeks, we have witnessed the impact of the Leadership Roundtable's call for accountability and the utilization of the expertise of the laity to assist that Church. The first is our very own Susan King, who has been appointed to the US Conference of Catholic Bishops' National Review Board. It is both an honor for her and for us that she is a representative on that committee.

Additionally, we learned that a symposium will be held in Rome next February to help the bishops around the world comply with the recent Vatican mandate to establish guidelines for handling accusations of clerical sex abuse. The Gregorian Pontifical University and a number of Vatican offices will sponsor the event and will assist representatives of the world's Catholic bishops conferences and major superiors of religious orders.

SETTING THE STAGE FOR IMPACTFUL ADVOCACY:

Why Catholic Schools Matter and What is Needed to Save Them

Moderator: John Eriksen, Superintendent of Schools, Diocese of Paterson

Francis J. Butler, PhD, President, Foundations and Donors Interested in Catholic Activities, and Secretary, National Leadership Roundtable on Church Management

Christine Healey, Executive Director, International Education Foundation

John Eriksen

Superintendent of Schools
Diocese of Paterson

When you ask me why advocacy is important for Catholic schools, I think of three reasons. First, advocacy is important because Catholic schools are a core ministry of the Roman Catholic Church in this country. Second, because without Catholic schools, the cities, towns, counties, states, and even this country could not deliver education to all children. And that's just a simple reality in which we live. Finally, advocacy is important because Catholic schools have produced leaders and, more importantly, the good, faith-filled people that have been part of the bedrock of this country, both in the past and in the present, and who must be in the future. The two panelists today are going to offer two examples of an aspirational and an actual approach to advocacy.

We think of these things in three ways. First of all, what's the issue? So for advocacy, what are you advocating for? Secondly, what's the instrument? Who's doing it and how are you going to do it? And, finally, what is the timeline for this? So today we're going to really look at issue, instrument, and timeline for two approaches to advocacy on behalf of Catholic schools.



Francis J. Butler, PhD

President, Foundations and Donors Interested in Catholic Activities (FADICA)
Secretary, National Leadership Roundtable on Church Management

Examples of Innovation

Earlier this year, FADICA brought together a small conference that explored the question, Is this the end of parish-managed schools? Boston College's President, Rev. William P Leahy, SJ, one of the most proactive university presidents on the future of the Catholic schools and indeed the Church in the twenty-first century, set the tone of the discussion with a frankly stated opinion: "I do not think



the traditional parish school as it is understood by us ...will be viable in the future unless there can be a school endowment, a subsidy from the parish or the diocese or archdiocese or some kind of partnership with a larger institution."

Fr. Leahy's respondent panel, the school superintendents of New York, Chicago, and Bridgeport [Connecticut], did not disagree. In fact, they offered their own frank appraisal of how a "business-as-usual" approach to Catholic schooling today is more than likely a formula for extinction. Each superintendent showcased examples of innovation, cooperation, and new partnerships. They told us that the highest quality of education is still achievable through Catholic schools, but that we must go about the tasks of building thriving educational institutions in a new way.

You will hear as we did about the new governance model that has been created in the Diocese of Bridgeport that has stabilized enrollment, created new partnerships, new school configurations, a focus on quality, continuing professional education for teachers, an emphasis on principal leadership, cooperative relationship with Catholic universities and the public school system, and an approach driven by principles of accountability and transparency.

Schools are thriving in Bridgeport. At least 12 of them have been designated US Blue Ribbon Schools. Test scores have improved dramatically, and almost all of the grade

6 inner-city cluster students met or exceeded state goals for reading. Compare that to only 36-percent of their public counterparts and you have grasped the stunning accomplishment that has unfolded in Bridgeport Catholic schools.

I chose Bridgeport here as an example of the impressive change and results-oriented quality that is showing up in many dioceses throughout the nation. My colleagues with me this morning as well as many of you seated out there are agents for innovation. You are experimenting with the ways Catholic schools are configured, staffed, funded, led, planned, and partnered. Some of you are involved in the consolidation of city-wide systems for example. Some are bringing experience with centralized administration, economies of scale, new use of summer schools, dual-language programs, and new marketing and recruiting approaches. In Los Angeles, for example, the Specialty Family Foundation brings to our table new research that it funded at UCLA in connection with the foundation's work with 7 inner-city Catholic schools.

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So herein lies a major problem: How do we foster a belief in the future of Catholic schools, and foster innovation and quality when the story line about Catholic schools portrays them as moribund?

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The research shows why the number of Latino students enrolled in Catholic schools remains embarrassingly low at three-percent nationally. The foundation has rich data now to guide their marketing approach within these 7 schools that will have relevance nation-wide.

In Dayton, one of our FADICA foundations is exploring the area of value added modeling, a fairly new method in the field of education that uses a means to determine annual student growth as opposed to simply charting student achievement. Catholic school participation in this type of assessment is important in the state of Ohio, where value added data are being utilized across the public and private schools. Fifteen Catholic schools are now participating and another four will be added this year. With such data it is possible to align curriculum, instruction, assessment, and professional development.

Last February our [FADICA] foundations came away from their schools conference pleasantly surprised by the range of entrepreneurial initiative and spirit of innovation that seems to be taking hold in all parts of the country. I say surprised because donors are shaped by the dominant media narrative about Catholic schools, and it has not been all that encouraging.

Earlier this month for example, the *New York Times* featured the headlined story “As Catholic Schools Close in Major Cities, The Need Only Grows.” In it, Columbia journalism professor Samuel G. Freedman reported on the closing of the famed Rice High School in Harlem. Freedman references the endings of other landmark inner city Catholic High Schools including Cardinal Dougherty High School in Philadelphia and Daniel Murphy High School in Los Angeles, and he provides his readers the familiar story line about the Catholic Church’s loss of women and men religious, urban migration, and the increased cost of its educational ministry.

So herein lies a major problem: How do we foster a belief in the future of Catholic schools, and foster innovation and quality when the story line about Catholic schools portrays them as moribund?

If you were a parent might you consider an alternative to placing your child in a school with such a tentative future? Maybe that’s partly why we have 690,000 empty seats in our Catholic schools. I am here to help us to imagine an actionable step that we might take together that will shape a more positive future for the Catholic schools.

I have envisioned a communications campaign that helps us tell the story of how change and educational innovation is paving the path to thriving Catholic schools for the future. Such a proposal might, in time, pave the way for something even more ambitious, which will yield new financial resources for Catholic schools everywhere.

The Future is Now Campaign for Catholic Schools

For discussion purposes, I will call this proposal, The Future Is Now Campaign for Catholic Schools. This will be a national level effort to tell the story of Catholic schools as they try new approaches to Catholic education and when their work appears to be of strategic significance to the future of schools ministry. The proposal employs the use of all forms of communication, including television, radio, social media, blogs, viral ads, promotional publications, and billboards. It includes the capacity to interface proactively with journalists to help improve their coverage of Catholic education. The campaign is

research-based and adopts a media theme that captures the public's imagination in much the same way as some of the best of American advertising has done.

We all are familiar with Apple's "Think Different" ads, the U.S. Army's "Be All You Can Be" recruitment campaign, Nike's "Just do it" messages, and Hallmark's "When you care to send the very best." These campaigns demonstrate the ability of public relations not only to contribute to important corporate objectives, but they are of high quality and inspirational, and often reflect positive social images that touch the human spirit.

The Future is Now Catholic Schools Campaign would tell the story of what our best schools can do, which values drive them, and what they mean for their students, families and their communities. The campaign would lift up examples where innovation, strong leadership, and success in human advancement is at work.

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The Future is Now Catholic Schools Campaign could provide the missing catalyst to make the fire of innovation burn more brightly in our Catholic schools. It allows us as advocates for Catholic schools to let the light shine on these extraordinary institutions.

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The campaign would not be manufactured hype, but based on a real portrayal of the religiously motivated schooling, grounded in the belief in human dignity and demonstrating the transformative and liberating power of a great education. We have a powerful story to tell America.

Some of the obvious, practical outcomes might include:

- An increase in student enrollment
- Additional candidates to serve as teachers
- More donors and volunteers for diocesan and local school efforts
- A public that is receptive to state and federal school choice initiatives
- Higher morale and new sense of pride within our schools.
- A better image for our Church

The campaign could be managed by a free-standing 501(c)(3) nonprofit or even a university-based center. Its 12 member national advisory body would be comprised of gifted communications and public relations experts, recognized Catholic school business and Church leaders, and, of course, major donors. Together this group could work with a small staff to identify goals and key performance indicators, and help guide and raise funds for the yearly campaign which is estimated to run anywhere from \$60- to \$100-million per year. The ad campaigns would run two seasons per year for three years.

The national advisory body would ensure that market research is done. It would hone effective messages and themes and monitor the progress of the campaign, seeking to measure changes in public attitudes toward Catholic schools.

Because the campaign would be new and untested, it might be best to start it within a limited time frame during which it would demonstrate measurable impact at a defined level. If successful, The Future is Now Catholic Schools Campaign could grow into a national endowment for Catholic school innovation, an ambitious idea that has been talked about in the past and could someday come to life following a first rate campaign like this.

In sum then, The Future is Now Catholic Schools Campaign could provide the missing catalyst to make the fire of innovation burn more brightly in our Catholic schools. It allows us as advocates for Catholic schools to let the light shine on these extraordinary institutions.

Christine Healey

Executive Director
International Education Foundation

From the view of our foundation and our initiative, Catholic schools matter for two reasons. One is that those who have been educated in Catholic schools are strong participants in the Catholic Church and will continue to be strong participants in the future of the Church. The second is that children educated in the Catholic faith will be needed in the future. We have many tough problems we're going



to face in the twenty-first century and need children educated in Catholic schools, who understand their faith, who are smart and academically stellar, with a sense of discipline for life. Children in urban centers, who may or may not be Catholic, but who are educated in the faith, have had to come out of places like Camden [New Jersey] and face tough troubles. These children will be needed to solve the problems in the twenty-first century.

We need public policy solutions, especially as we look at the urban economic centers and low-income communities where our Catholic schools are located. We need to teach the folks in Catholic schools how to be advocates for themselves, in the public policy area, and also in realizing the business of sustainability that is being driven by their mission, really living it and knowing it. We need stellar leaders, pastors that preach from the pulpit about Catholic education, and an empowered laity to create stability in the Church and in the schools.

Speaking from the perspective of Camden, we know that if we lack a public policy solution, Catholic schools will be gone. When we look at the revenue breakdown for a typical urban Catholic school, 20-percent of the revenue is coming from tuition in [inner-city] Camden, for example, unlike at suburban schools where it can be more like 70-percent. About 30- to 35-percent of contributions are from the diocese, about 3-percent from the parishes in Camden, and about 35-percent from funders, like myself.

We Can Do Better New Jersey

At the start of 2011, there were 7 school choice bills in the US that had been enacted. At the end of this year there will be 13. The New Jersey Catholic Conference of Bishops is fighting for school choice in New Jersey and the advocacy arm of the Church is advocating for these policies across the country. But we do not want to wait and watch on the sidelines; we want to get active. And so in 2010 we formed a group called “We Can Do Better New Jersey,” and the idea was to create a grassroots effort that would complement the efforts of the Catholic Conference. The purpose is to figure out how to educate and mobilize residents in New Jersey to support public policy solutions. For example, we know that dioceses are struggling to drive dollars into urban Catholic schools, and as their contribution drops over time, we will need 25-percent of the funding to come in as a result of the Opportunity Scholarship Act, if the act passes in New Jersey. As that funding comes in, the philanthropic community, which funds scholarships, will continue to invest, knowing that we have a stable model. So, we will still have some diocesan and parish support, but we also will have the public funding and the private philanthropic money. That’s a stable future.

We wanted to be fully aligned with what was happening in the Conference. We wanted to work with the superintendents, the network coordinators who have been out there in schools, and with all the parishes and schools. In New Jersey, our goal was to align 100,000 Catholics across 5 dioceses throughout the state.

John Eriksen

Opportunity Scholarship Act

One of the things we're talking about in New Jersey is something called the Opportunity Scholarship Act, which provides tuition tax credits for scholarships in districts with failing public schools. Those who are not in agreement with this have hundreds of thousands of members and are funded with tens of millions of dollars. I think some of our strengths are that we have a mission that transcends salaries, and a belief of what has been, what is, and what could be. Finally, we have this great, untapped network of schools, of kids in those schools, of parents, of alumni. We had not been applying resources to really mobilize and make them advocates. And our thought with "We Can Do Better New Jersey" was that we have a high degree of sophistication and excellence with regards to interacting with the legislators. We don't set the policy, we take what the policy priorities are and attempt to educate Catholics and supporters of Catholic schools to help achieve those ends.

We have 300 schools, and we are attempting to build a network of 300 school coordinators. Right now we're probably at about 160, some of which existed before, though many did not. We develop curriculum and lesson plans around some of the issues or history that we will make available in the fall, so that teachers can educate their students and in turn educate their parents. We also have a website, a newsletter, and we've held 7 rallies.

The other thing we can do is election related advocacy. We make it very clear who is in favor of and who is opposed to school choice and tax credits. I think some legislators fail to take Catholics as a constituency seriously. Our goal is for them to take us seriously.

There are a 100,000 Catholics who love Catholic schools in the State of New Jersey. Challenges aside on other doctrinal issues, I think support for Catholic schools is something for Catholics to rally around. And the nice thing, at least in New Jersey, is that those who support the Opportunity Scholarship Act are actually aligned with other core doctrinal issues that are of importance to the Church.

SELECTED QUESTIONS AND QUOTATIONS FROM MEETING PARTICIPANTS

QUESTION

Have you experienced any resistance to either of these proposals from local Catholic schools? Could the campaigns be aligned for greater impact?

CHRISTINE HEALEY

In terms of the schools, we have developed a great relationship with the superintendents in the dioceses [in New Jersey]. Also, the passion of the folks that come out to these rallies is just amazing. I also talk about what Catholic schools should mean to suburban taxpayers who choose to send their children to Catholic schools. The tax bill for public education in Newark is \$1 billion; 10-percent of that is being paid by the residents of Newark, and 90-percent of that is being paid by them. So they are paying three times because they are paying for the public schools in the suburbs, they are paying for the Newark public schools and they are paying for their local parish school.

FRANK BUTLER

It is very important to tell the public what good these schools are achieving and how they are saving the tax payers. I do not think the general public understands this dimension.

You could build The Future is Now Catholic Schools Campaign much like a presidential campaign, where you select key media markets and run ads at certain times that are effective, coordinated with people on the ground who are trying to advance a state initiative, but ultimately the end game for these schools is to get the public to support what's going on in them and to see that these are valuable for America. These schools are performing a service, and the ones that are pioneering in innovation will be the front-runners for education, all education. Education remains the number one issue for this country, so we need to position ourselves so that the public can see the innovation and success of Catholic schools.

QUESTION

What utilization of the social networking techniques have been used in advocacy for Catholic schools, and how might it be used more effectively in the future?

JOHN ERIKSEN

We use the panoply of facebook and twitter and the others. We try to drive people to our website. We're religious about tracking hits, subscriptions, and creating newsletters. So I think we [We Can Do Better New Jersey] use social media well, and for a startup, I think we have seen some nice growth. As far as getting coordinators, getting to these schools, and getting these rallies, we really need people to contact; much of our use of technology is introducing ourselves.

QUESTION

Could The Future is Now Catholic Schools Campaign be used on a local level in addition to the national model?

FRANK BUTLER

I think it would be. We tried to make it as practical and useful at all levels as we could, though this focus is sort of the national theme, how to present a powerful theme annually with compelling story telling, but you could adapt that to a local market very easily.



Abbot Giles Hayes, OSB

REV. ABBOT GILES HAYES, OSB

President-elect of the Conference
of Major Superiors of Men,
Abbot of St. Mary's Abbey/Delbarton

There's another source of revenue out there that we have not spoken about yet. Count the number of Catholic schools that may be charging \$15-25,000 per year for tuition, and go to those leaders and say, Help us. There was a school in a wealthy

part of one diocese that began to help poor schools. The leadership at the wealthy school were at first worried that big donors would stop or decrease their giving to the wealthy school. But they did not.

Parents at the wealthy school helped the leadership of the school convince the main donors of the significance of caring for poorer schools in the diocese. Because of the participation of the parents, the wealthy school's donations increased from \$600,000 to nearly \$1 million dollars this year.

THOMAS GROOME, PHD

Director of the Institute of Religious Education and Pastoral Ministry Boston College

It is possible to tell a story about Catholic education that can sell and that can be tremendously convincing. We must debunk the myths and the stereotypes that Catholic schools offer some kind of a narrow sectarian proselytizing or indoctrinating process, but rather show the rich humanizing education and demonstrate that the values that undergird

Catholic education are in fact great universal values: respect for the person, commitment to the common good, commitment to the poor, to justice, and to community. These are great universal values that can appeal to all people of good will.



ERIK P. GOLDSCHMIDT, PHD

Executive Vice President
FADICA

We need a national mechanism for coordinating this conversation; if our advocacy is localized, we will fall back into our diocesan approaches, or our parochial approaches. We're not sharing our best practices across the nation.

Patricia Weitzel O'Neill



PATRICIA WEITZEL O'NEILL, PHD

Executive Director at the Roche Center for Catholic Education Boston College

[Decision makers and policy crafters] don't know what [the Catholic school] brand is. They don't know what we're about, and that's our fault because we have not collectively said, This is who we are and we're really proud of it. We've got all different kinds of Catholic schools. We're talking about the leafy school, and we're talking about the suburban school, and we're talking about the urban school. We're all Catholic schools. We're all about the same thing and that's the message we need to get out nationally so we can get others behind us nationally.

MARGARET DAMES, PHD

Superintendent of Schools
Diocese of Bridgeport

In Bridgeport, we've been very successful with partnerships with the public schools, and what we've done is we've written grants with two of the large urban centers. We've actually received a GE grant to fund a whole high school of engineering because we partnered with the public school system, and we now have a major funder who is looking at the idea of sending some of the inner-city [public school] students to our schools because they're doing so well and saving money in doing that.



Margaret Dames

TOWARD A CULTURE OF EXCELLENCE: MANAGEMENT, FINANCES, AND HUMAN RESOURCES FOR THE FUTURE OF CATHOLIC SCHOOLS

Moderator: John Eriksen, Superintendent of Schools, Diocese of Paterson

B.J. Cassin, Founder and Chairman, Cassin Educational Initiative Foundation

Richard Burke, President, Catholic School Management, Inc.

B.J. Cassin

Founder and Chairman

Cassin Educational Initiative Foundation

The first point I would like to make is to recognize the heroic work being done by many diocesan superintendents of schools, a number of them present today. It is no fun to have to ration a school system to fit today's economic realities, and despite this, there has been much good work done by these individuals, and I applaud you.



A case in point is the Pathways to Excellence [strategic plan for Catholic schools] in the Archdiocese of New York. Challenging the status quo and offering realistic solutions is to be commended, and maybe it can even serve as a model for other dioceses to follow eventually. Then there is the “out of the box” thinking in the Diocese of Paterson, led by our moderator John Eriksen. So much is being accomplished, but the urgency of the challenge continues.

The purpose of this session is to identify “big ideas” that can be debated and challenged in the plenary session, with the outcome of identifying a number of actions that the Leadership Roundtable and the Church [at large] can adopt to move the needle of saving Catholic schools.

I'm going to offer two ideas for debate. First, is the current diocesan-schools organization and structure still working or should we look at new models? Is it time to think outside the box? I believe it is, and many dioceses think so, too, and they are working on that right now.

Second, whenever we hear the question "can Catholic schools be saved?" it is always in the context of financial sustainability. I propose a coordinated national initiative to advocate state-by-state support of a tax-credit program for private schools. I know that this work is already being done in some states, but I am looking to add leverage.

I approach these two ideas from the experience of working with so many mission-driven educators who are involved in the 24 Cristo Rey high schools and 63 NativityMiguel middle schools. I am not an educator, but a business guy. And it is from that perspective I have witnessed organizational structures that work with impressive outcome data. The

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So much is being accomplished, but the urgency of the challenge continues.

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question is, can any of these ideas be implemented in a diocesan framework? What I will quickly describe is how Cristo Rey and NativityMiguel schools and their networks work. It will sound like nirvana, but I will tell you up front that these are relatively young networks and there have been, and continue to be, challenging issues, and sometimes the resolutions of these issues resemble the proverbial sausage making. But in the end, the networks figure it out and their performance and outcome data speak for themselves. It is noteworthy that the question guiding the networks' leaders is, "is this the best decision for the kids?" That is a principle that should always be a part of our decision making.

The 63 NativityMiguel middle schools today serve over 5,500 students in 43 cities in 27 states through an 11-month intensive curriculum that prepares inner-city students for success in high school. Eighty-seven percent of NativityMiguel students graduate from high school compared to 40-percent for public school students in their area.

The 24 Cristo Rey high schools currently enroll 6,500 students. This year, 19 of the Cristo Rey schools have a graduating class; for 6 of them, it is their first. The class of 2011 more than doubles the size of last year's, totaling more than 1,100 student graduates from exclusively urban, low-income families. Every one of these students has been accepted

into college with aspirations to not only enroll, but to persist and succeed. These two networks have many elements in common. Each has several standards:

- The first of these standards is that the schools are Catholic and serve the poor. The Cristo Rey schools have a tongue in cheek saying, “If you can afford to go to this school, you can’t.”
- The second common element is that each school within the two networks is independent with its own board and is a formal member of the network, meaning it must adhere to the standards.
- Third, each school uses the president/principal model, where the president is the CEO and principal is responsible for the classroom.
- Fourth, these schools share best practices through cohort meetings. By way of example, the school development directors from both networks met in Chicago last month to share with and hear from other professional fund raising consultants.
- Fifth, each network needs to raise funds. The NativityMiguel must raise 100-percent of their budget and Cristo Rey needs capital expense funds. Last year, NativityMiguel schools raised over \$63 million and Cristo Rey schools raised \$32 million over and above the revenue from the work program. This is amazing and a tribute to these schools, but the pressure of fund raising wears on their leaders and inhibits the networks from expanding to meet the demand for new schools.
- The sixth thing in common is transparency: both networks compile performance and outcome data on each school. This data includes test data, profiles of the student body, and salaries of staff right down to cost per mile to transport a Cristo Rey student to their workplace. Both networks use [the consulting firm] Mission Measurements to help construct and implement these reports.
- Finally, both networks require collegial visits. This is the quality control for the network, where a group of peers visits and reviews several standards with the school leadership. New schools have annual visits for three years, established schools every three years. I’ve detailed this because I have always felt that small networks of diocesan schools would be a more effective organizational structure versus parish-centric schools reporting to a diocesan superintendent. New York’s Pathways to Excellence proposes a variation on this theme, which they call “regionalization.” The schools in this mini-network of 6 to 8 schools would have a board comprised of educators and local businesspeople willing to support Catholic education, and I submit that you would be able to better attract local business leaders with a larger group of students versus one school. The parish school would have an advisory committee to maintain the parish culture. Fund raising, marketing, and financial controls would be part of the mini-network’s mission. The recruiting and training of leaders and teachers, and other human resources functions, would also be centralized.

I believe that elements of what I just detailed can be replicated in other Catholic schools.

And now for our second idea and the elephant in the room: financial sustainability. The United States is the only major industrial country that does not financially support private and faith-based schools. This goes back to the 1830s when Senator James Blaine proposed an amendment to the federal constitution banning direct financial aid to educational institutes that have religious affiliations. It lost in the Senate by only four votes, so Blaine took his crusade to the states and was successful in all but 11. Today, in addition to overturning Blaine, you have public teachers unions blocking any aid to private schools, especially charter schools and faith-based schools.

I believe that now is the time to seize on the growing state legislation allowing the use of tax-credits to fund private religious schools. The concept is that states allow individuals and businesses to reduce their tax liability by contributing to organizations that disperse funds to families to help them pay for their children's education. These organizations are independent of the state bureaucracy. The key here is that the dollars do not go through the hands of any state office but through an independent organization, therefore not violating the establishment clause. Important in these stressful budget times, a case can be made that tax credits save money. A nonpartisan report prepared by the Florida legislature's Office of Program Policy Analysis and Government Accountability concluded that taxpayers saved \$1.49 in state education funding for every dollar lost in corporate income tax revenue due to tax credits for scholarship contributions.

So, this is a cost-saving plan. There are 9 states that have existing tax credits for education and 13 states that have bills pending. Do we want to sit passively by and hope to further this trend? If we do, we will get what we deserve: the proverbial short end of the stick. I know that a number of you are working within your states, but what is missing is an overall, coordinated, state-by-state effort to be strong advocates for strengthening and adding additional states offering these credits.

We should join forces with those organizations working in this area of school choice, such as the Center for Education Reform who recently published a study about saving Catholic Schools, and the American Center for School Choice who, in April, held a symposium entitled "May Superman Pray?" Interestingly, this was co-sponsored by Catholic, Jewish, and Muslim students at the University of California Law School.

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Times have changed and the way Catholic schools operate must change, or we will continue to fall behind.

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As you know, the Supreme Court this spring handed down a decision allowing the use of tax-credits to fund religious schools in Arizona. This decision could be the tipping point in the resurgent school choice movement and eventually offer Catholic schools the potential for significant new funding. The Court effectively mapped a route for state legislatures to skirt the establishment clause.

Catholic schools should not be bystanders, but national players. I propose [the establishment of a group that will]:

- Develop alliances with national organizations advocating vouchers and tax credits
- Develop partnerships with other faith-based school organizations such as Lutheran, Episcopalian, Jewish Orthodox Union, and others to present a united front in the advocacy and lobbying effort
- Develop national, state, and local “tiger teams” of business leaders, politicians, and others to bring the most leverage to the issue
- Bring this project to the United States Conference of Catholic Bishops to gain their support
- Increase morale and instill a new sense of pride within our schools
- Promote a better image for our Church

Times have changed and the way Catholic schools operate must change, or we will continue to fall behind.

Richard Burke

President

Catholic School Management, Inc.



I speak to you today as the simple practitioner. For virtually all of my adult life, I have been committed to ensuring both viability and vitality for Catholic elementary and secondary schools, and I have been blessed to have been given the opportunity to work in this arena first by Fr. James Fanelli and Archbishop John Whealon of the Archdiocese of Hartford, and then by Msgr. John Meyers, former president of the National Catholic Educational Association. Over the past 38 years, Catholic School Management has worked with more than 3,800 Catholic schools, and the vast majority of those are today still open and continuing to integrate elements of faith with high quality academic programs.

In our telephone conference to prepare for this session, John raised a most provocative question, “Why are Catholic colleges outperforming Catholic elementary and secondary schools in virtually all areas?” Indeed, that question holds the key to moving “toward a culture of excellence for Catholic schools.” If Catholic elementary and secondary schools are to be vital instruments of ministry, education, and formation for generations to come, the issues of ownership, governance, sponsorship, and administrative leadership must be addressed head-on, separated, and, in many cases, modified significantly. Fr. Hesburgh, [former president of the University of Notre Dame], recognized this reality in 1944 when he, with the support of his doctoral dissertation advisor, Paulist Fr. Eugene Burke, proposed a dissertation based on the then avant-garde movement called “Catholic Action” in advocating for a greater role of the laity in the ownership and governance of Catholic education. He was able to implement that goal for the benefit of the University of Notre Dame with a separation of ownership and governance in 1967. As Fr. Hesburgh says in his autobiography *God, Country, Notre Dame*, “We were dead set against any system that would perpetuate the old system of clerical control.” The model that called for the owners to retain a limited number of reserved powers, while turning over governance responsibility to a largely lay board of trustees, has now been adopted by most Catholic colleges and universities.

Anthony Bryk, Peter Holland [and Valerie Lee] expressed a similar perspective in 1984 with the publication of *Effective Catholic Schools: An Exploration*, where they concluded

that the financial problems of Catholic schools could only be solved if issues of ownership and governance were addressed simultaneously.

I submit that Catholic colleges and universities today are stronger and more viable than elementary and secondary schools because they have indeed embraced the concept that issues of ownership and governance are central to long-term viability and vitality. This is based on the premise and the truism that, "People respond to people, not to institutions." It has never been more true than it is today.

I submit for our consideration that Catholic elementary and secondary schools not only become more sustainable, but more vibrant when the issues of ownership and governance are separated. Parish schools as we have known them, by and large, will not survive. I also believe that it is our responsibility to assist bishops in recognizing that our overburdened parish priests and pastors often times have neither the training nor experience today to carry out the multiple complex responsibilities required in operating Catholic schools effectively.

I will outline briefly what I believe to be the most important best practices to be addressed with regard to management, finances, and human resources for the future of Catholic schools.

Management

At both the elementary and secondary levels, those schools that are the most financially stable today are those that have separated and clearly defined responsibilities of ownership and governance. In each of these models, the responsibilities of ownership are clear and well delineated for all constituencies. These responsibilities are often referred to as "reserved powers," and may be carried out by a bishop, a pastor, a diocesan superintendent of schools, a corporate board, or a canonical administrator.

You have already heard of the wonderful work of Bishop William Lori and Superintendent of Schools Margaret Dames with regard to the diocesan ownership of Catholic elementary schools in the Diocese of Bridgeport. The concept of appointing a canonical administrator to oversee the ownership responsibilities of Catholic schools is currently being utilized in the Diocese of Monterey in California, and I give great credit to the leadership and courage of Bishop Richard Garcia in initiating this program and providing the option for pastors to assign canonical responsibilities to a trained, experienced, and competent canonical administrator appointed by the bishop. In this model, the pastor retains his important

“ I submit that Catholic colleges and universities today are stronger and more viable than elementary and secondary schools because they have indeed embraced the concept that issues of ownership and governance are central to long-term viability and vitality. This is based on the premise and the truism that, “People respond to people, not to institutions.” It has never been more true than it is today. ”

role as spiritual leader while being relieved of the day-to-day responsibilities of ownership, finance, and human resource management with regard to Catholic schools.

In just one example, Fr. Ken Brown, pastor of St. Patrick Parish in Arroyo Grande, CA, utilized the canonical administrator approach four years ago when his school faced enrollment declines and financial deficits. Today, the school is at capacity enrollment and breaking even annually. Fr. Brown has the opportunity to interact pastorally with students, teachers, administrators, and board members.

Next, we have seen significant enhancement in school viability where governance structures are revised in light of modified ownership, with increasing governance responsibility vested in the laity through the utilization of boards of limited jurisdiction. Board members need to be selected carefully and well trained. Here I give great credit to several religious orders and the Dioceses of Chicago, Monterey, and, most recently, Grand Rapids, for moving in this direction and for providing the extensive and ongoing training needed for the individuals involved. The training that is provided must take place not only at the board level, but also for committee members. Committee members who may not be board

members themselves need to understand clearly their roles and responsibilities in relation to the board and in relation to school administrators. Committees must meet separately from the board as a whole, providing the information needed for data-driven decisions. The most effective boards have not only been able to assist with strategic planning, but also with enhanced financial planning and management, and with enhanced development programs. With these boards in place at all three Catholic high schools and 10 Catholic elementary schools in the Diocese of Houma-Thibodaux beginning in 1997-98, annual giving

grew from a total of \$250,000 in aggregate that year to more than \$2.4 million in school year 2007-2008, according to Sr. Immaculata Paisant, superintendent of schools.

Human Resource Development

It perhaps goes without saying that excellent administrative leadership is one of the keys to success for any Catholic elementary or secondary school. However, we all too often find administrators working without clear contemporary job descriptions, minimal orientation, and no annual performance evaluations. Conversely, we find the most successful schools in dioceses or religious communities where owners and canonical administrators collaborate with superintendents to provide professional administrative training, clear job descriptions, annual performance evaluations, succession planning, and clarity of roles and span of control issues. Indeed the Leadership Roundtable may be of tremendous help in these areas in the future through the adoption of a new toolbox of Standards for Excellence for Catholic schools.

The effective management of Catholic schools also relies on clearly defined and well promulgated foundational documents, and these include the statements of philosophy, mission, vision, and the profile of the graduates at graduation. Indeed, while I can point to dozens of schools that are thriving today with these documents in place as relevant and contemporary, I can think of no instance of a school thriving without these documents. By way of example: Bishop O'Dowd High School [Oakland, CA] faced serious problems negatively impacting its viability in 2004. Oakland's Bishop Allen Vigneron sought the assistance of Catholic School Management and the new leadership produced a new set of foundational documents, including a vision that called for the school to be the most technologically advanced high school in the area. Today the school is thriving and about to embark on a capital campaign for expansion.

Given the abundant research on Generation X and Generation Y, it is critical that clear parental expectations be established and, more importantly, that Catholic school teachers and administrators take the time to learn from parents about their expectations regarding the Catholic school. This is most effectively achieved through the use of personal interviews at the time of registration and re-registration, annual parent satisfaction surveys, and grade-level conferences and coffees with the principal throughout the year. These best practices with regard to clarifying expectations most often result in not only full enrollment, but waiting lists. At one school in Naperville, IL, the principal has been carrying out all of these practices faithfully for several years. Despite the fact that a brand new, state-of-the-art Catholic school was opened several years ago just a few miles away, Ss. Peter and Paul School has retained capacity enrollment and satisfied parents.

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It perhaps goes without saying that excellent administrative leadership is one of the keys to success for any Catholic elementary or secondary school. However, we all too often find administrators working without clear contemporary job descriptions, minimal orientation, and no annual performance evaluations.

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Strategic Planning

Another best practice relates to strategic long-range planning, which is essential to Catholic schools today. It is also essential that it be carried out in a collaborative manner with input and participation from parents, teachers, administrators, and board members. Those schools that not only prepare and implement strategic plans, but promulgate them as well, have seen growth in both enrollment and resources. St. Mary Magdalene School in Camarillo, CA, received a quarter-million dollar gift after promulgating its recently prepared strategic plan that called for the integration of technology with the teaching and learning process. The donor found the plan to be compelling and well worth their philanthropic support.

Finances

With regard to financial viability, it has been true since I worked with my first client Catholic elementary school in 1973 that people respond to people, not to institutions. People will invest their money where their heart is and where they see opportunities for success. The structures I just described facilitate this involvement and investment. High functioning schools operate with a well-structured finance committee of the board and this finance committee works collaboratively and supportively with school administrators in terms of financial planning, budgeting, financial oversight, financial analysis, and financial reporting.

Those schools that are most financially effective and able to attract the most in terms of third-party support operate with:

- A long-range financial plan that is regularly updated
- A budget development process and timeline that is clear to all and ensures detailed budgets are in place before tuitions are set
- Monthly financial oversight and analysis taking place in a collaborative manner
- Annual financial reports that are presented both in print and electronically.

In addition, high functioning schools operate with development or institutional advancement committees of the board, structured in such a way that the subcommittees work continuously in the areas of

- Communications
- Marketing
- Annual fund
- Fundraising coordination
- Planned giving.

The most effective schools recognize the need to address communication and marketing issues before seeking external financial support.

In one of our client schools, St. Philip the Apostle, the pastor reluctantly agreed to all of the structural changes that I just described. Three years after the board was established, the school launched its first annual giving program, which the pastor estimated would realize a goal of \$25,000. The actual amount received was \$102,000, and today this school has been completely renovated and expanded, still serving a capacity student population.

I give great credit to the University of Notre Dame, Loyola Marymount University, Boston College, Loyola of Chicago, and others that have addressed head-on the task of preparing administrators for Catholic schools. This work needs to continue. However, we find succession planning largely absent from, and yet essential to, the school and diocesan levels. Much more needs to be done in this area in terms of the preparation and grooming of principals, assistant principals, presidents, superintendents, and assistant superintendents. Moreover, from a human resources perspective, those dioceses and schools that are most effective see superintendents and their assistants in the field, working closely with schools in a proactive way to assist local school administrators with myriad tasks. As one principal remarked to her superintendent just last week, "I have been a principal for almost 10 years, and during that time bishops and superintendents have talked about marketing and development programs, but during your four years here, you have been with us every step of the way, providing monthly resources to help us achieve those goals in a systematic way."

SELECTED QUESTIONS AND QUOTATIONS FROM MEETING PARTICIPANTS

REV. KEVIN KENNEDY

Adjunct Professor

The Catholic University of America

Do you have some good examples you can share with us where recruitment, retention, reward, and job descriptions are aligned with strategic goals?

RICHARD BURKE

There are a number of schools all over, though far too few, that utilize those, but the premise behind your question is correct: if we tie them together, we do a much better job. I will refer you to [meeting participant] Abbot Giles Hayes, who has, in fact, been perhaps a model of that notion at Delbarton School in tying together strategic goals with the recruitment, retention, and the compensation packages for teachers to do just that. And there is another model currently utilized in the Christian Brothers' De La Salle High School in Concord, CA, that is remarkably well received as well.

DR. WILLIAM MCKERSIE

Associate Superintendent for Academic Excellence

Archdiocese of Boston

Talk to us a bit about how you operate on a regional school model when you have access to great amounts of philanthropy in some places but less in others.

BJ CASSIN

It will vary, obviously, from diocese by diocese, but I think there is a fundamental tenet that one should think about: philanthropists look at outcome data. If I am going to invest a dollar, what will my return be? And I am not talking about economic return, but whether or not your program meets its goals. So whether it is in a single school or a cluster, the same principle applies. Furthermore, for a foundation to be looking at investing in a program that will aid 5 schools or even 8 schools, you must have a better story to tell.

QUESTION

If we don't have the philanthropic help, can we still move forward with these regional structures?

BJ CASSIN

We should be able to move forward because we have already [in some places], but it takes a lot of hard work. Refer back to the numbers I presented; those are significant numbers, but there is a lot of blood and sweat that went into achieving those numbers. That is why I'm really trying to pound the table here for a coordinated national effort in terms of tax-credits. That is the door that is open to us and has not been available up to now. Vouchers in most places do not work because they go through the system, and the faith-based schools are typically at the end of the line to get the leftovers.

JOHN ERISKEN

Superintendent of Schools
Diocese of Paterson

One thing that I know some dioceses have done, which has worked to varying degrees of success, is actually linking four elementary schools with a high school, so that there is essentially one K-12 school.

It is not to say that there are not challenges, but this model has actually been helpful as far as consolidating business operations in the high school; we are able to place philanthropy and advancement on a larger scale.

When I proposed this a couple weeks ago, it was labeled a Robin Hood situation: we make money from two of our elementary schools and from our high school, while we break even in one and we lose money in the fourth elementary school. It's not egregious, but we make money at certain schools and we transfer it to others.

And it works in one particular county because it has a homogenous population and a commitment to Catholic education, and we are upfront with it. It would not necessarily work everywhere, but we have a pretty strong high school that is sort of an engine for us. The high school views this as an advantage, because it sees the elementary schools as its feeder system, so it is in its self-interest to make the model work. Likewise, the elemen-

tary schools view it as in their self-interest, because they can access resources that they would not otherwise be able to get.

THOMAS HEALEY

Partner, Healey Development
Treasurer, National Leadership Roundtable
on Church Management

It is striking that both of you [BJ Cassin and Richard Burke] talked about changes in governance models as ways of making impact, because it does not cost much in dollar terms. It is not like building a new school or repairing a school, but it is an inexpensive intervention.

How does the canonical administrator idea work with the president/principal model?



RICHARD BURKE

The key is this: the parish schools, of which there are almost 6,000 in the United States now, are parish-based. In canon law, the juridical person is the parish, and the canons defined a juridical person as similar to a corporate entity, but define it as an organization that acts like a little child, that needs an administrator, typically the pastor, to oversee the public juridical person that is the parish.

In the model that Bishop Garcia has initiated [see above] with a great deal of advice from his canon lawyers as well as ours, the canonical administrator operates at the ownership level. The pastor signs a decree of specific delegation, turning back his responsibilities canonically with regard to that portion of the juridical person that is the Catholic school. The bishop then appoints a canonical administrator, usually a superintendent or someone very experienced, to carry out those reserved powers. I say that with that detail because that is at the ownership level, and there is still the board at the governance level.

The president/principal model is the administrative level of the school. So the president typically carries out the normative presidential responsibilities: oversight of budgeting, strategic planning, vision, institutional advancement, and the like, while the principal

carries out the inside, or COO, responsibilities: faith community affairs, academic affairs, student affairs and the like.

KIM PRYZBYLSKI, PHD

Superintendent of School Emeritus
Diocese of Monterey in CA

I spearheaded, with Bishop Garcia, the canonical administrator initiative, and this is how I explain my role:

There were four pastors who decided that they wanted me to serve as canonical administrator, so I become the “bad guy.” I step in when there is a parent problem, a student problem, or a teacher or principal that needs to move on to greener pastures. So instead of the pastor taking on that confrontational role, I go in and I do what needs to be done, and then I leave, because my office is not there, so that then the pastor can come in and talk to this family in a pastoral role. [The canonical administrator should be a full time job, with a strong principal in place to realize this model well.]



GEOFFREY BOISI

Chairman and CEO, Roundtable Investment Partners, LLC
Chairman of the Board, National Leadership Roundtable on Church Management

Could you please run through the arithmetic of the tax credits and the impact that they have had on the 9 states where they have been approved? And could you do it on a per student basis, so that we can relate it back to the question regarding how much of an overall contribution tax-credits could make to offsetting of the total budget that we are trying to finance.

BJ CASSIN

Looking at the Florida study, for example, the state spends [approximately] \$9,000 per student into the public schools, so they lose about \$6,000 in revenue, so there is a delta

there. [With tax-credits], the \$9,000, rather than going [from the state] through the child to the public school, the \$6,000 gets lost from the tax revenue that is not coming in. But because they are not spending that \$9,000 per student for the public schools, there is the delta there of savings.

GEOFFREY BOISI

What's the average cost to educate a student, right now, at NativityMiguel, which is funded fully by philanthropy. How much could, ultimately, be covered instead through a tax credit?

BJ CASSIN

In a NativityMiguel school, the cost per student for an 11 month program, which includes taking the kids to summer camp someplace, is between \$12- to 15,000. So if we could get \$9,000 of that [from a tax-credit], we would still need to fundraise, but if we had that in place, we would be able to expand the model significantly.

RICHARD BURKE

I might add that you may want to check with Dr. Ron Costello, superintendent of schools for the Archdiocese of Indianapolis and Joe Peters, the associate executive director of Catholic education, who have completed a very detailed analysis of the new Indiana voucher program, and have compared it to the cost per pupil in their various types of schools. Their analysis is one of the very best I have seen on paper to date.

ROBERT BIRDSELL

President and CEO

The Cristo Rey Network

Our school in Tucson gets \$600,000 a year in tax credits, about 15-percent of the operating expenses; our new school in Philadelphia is estimated to receive between \$500,000 and \$750,000 when at full enrollment; and in Florida, it could be upwards of \$1 million when we open a school there, covering 20- to 25-percent of the operating expenses.

BJ CASSIN

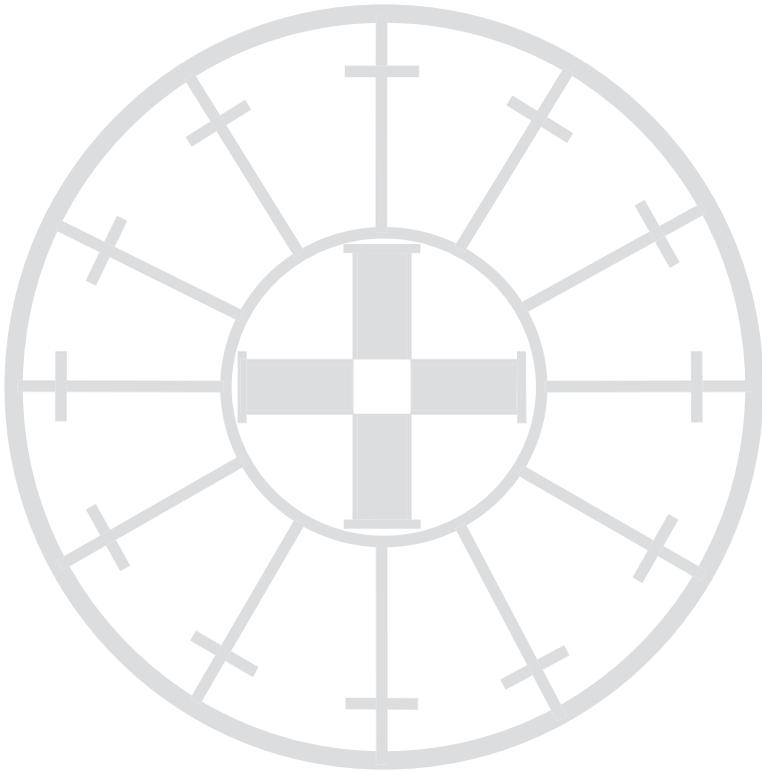
Think of the effect if all Catholic schools, not just the ones that we mentioned here, had the ability to have this kind of revenue come in [from tax-credits]; it changes the environment completely

QUESTION

I'm wondering if you would see this new entity encouraging states where there is no activity to begin to work on tax credit strategies?

BJ CASSIN

Absolutely. That is why I would want a national organization. And, again I would stress, we cannot do it alone. Catholics run the most schools, but we have to play the political game. And the political game cannot be played just by the Catholic Church; we must get the Lutherans, the Jewish Orthodox, and other nonpublic schools on board. We have a social justice issue that we are presenting, and part of that is to eliminate the discrimination of the inner city kids.



RECOMMENDATIONS FOR STRENGTHENING AMERICA'S CATHOLIC SCHOOLS

Below is the initial set of recommendations as crafted by the working groups (see Appendix A for a note on the working groups). The recommendations have been categorized and consolidated for publication, but they appear largely in their original form as presented to the executive committee during the 2011 Annual Meeting.

Some of the recommendations are affirming of what has already been done or is currently being done by the many who have dedicated their talents to Catholic schools for much of their careers. Other recommendations bring new thinking to the national dialogue on Catholic schools. The Leadership Roundtable intended to make its unique contribution to this movement by gathering a diverse, dedicated group and presenting them questions concerning the temporal health of Catholic schools, and then charging them with the task of developing actionable recommendations. This task is now done, and the Leadership Roundtable offers these recommendations as its contribution to this ministry that is vital to the mission of the Catholic Church in the United States.

A second publication will present the recommendations in greater detail, including ranking by level of difficulty and priority; the estimated cost and potential funding sources; and the identification of an existing organization that may implement each recommendation.

CATEGORIES

RECOMMENDATIONS

UNITY OF MISSION

Create a group that would develop a means for unifying the mission of Catholic schools at a national level, while recognizing that the mission looks very different in its implementation in each region of the country

Establish a unity of mission for all Catholic educational institutions and a national measure of Catholic identity that would be applied to all Catholic educational institutions

Re-establish the purpose of Catholic schools in terms of social justice, catechesis and evangelization

BEST PRACTICES/ STANDARDS FOR EXCELLENCE

Coordinate development of Standards for Excellence for Catholic schools and the The Leadership Roundtable's Standards for Excellence program

Set the Standards for Excellence for Catholic Schools as the national standard for Catholic schools

Organize regional "communities of practice" and training in best practices/Standards for Excellence for Catholic school networks

Develop a platform for disseminating best practices in Catholic school networks across the nation with an emphasis on "re-tooling Catholic schools for a new era"

Break down silos of practice by gathering Catholic school leaders around Standards for Excellence and best practices

Demonstrate that poorly managed Catholic schools are more expensive than well managed Catholic schools and establish a means for telling the difference between them

CATEGORIES

RECOMMENDATIONS

PHILANTHROPY

Create an innovative Catholic schools fund: Suggested Target \$100M
Create a nation-wide annual campaign for the support of Catholic schools in terms of access grants for students and capital grants for building new Catholic schools

Raise the profile of Catholic schools with philanthropists, both Catholic and non-Catholic

Create a “business case” for Catholic schools

Engage Hispanic philanthropy in support of Catholic schools that successfully welcome Hispanic students

Create a national level means of resourcing philanthropic efforts of Catholic school networks, especially those that serve minorities, the marginalized and the poor

GOVERNANCE

Create a national interdisciplinary “tiger team” to coordinate/network efforts for Catholic schools across the country

Explore a variety of governance, ownership and management models that include clear roles for diocesan, parish and school levels of participation

Establish a menu of best governance structures and identify when each is best used

CATEGORIES

RECOMMENDATIONS

LEADERSHIP

Create an institute for Catholic Leadership development that includes creating a virtual community of practice to help identify and spread best practices of leadership

Ask Bishops to make Catholic schools one of their top five priorities at a national level

Create a means for helping bishops and Catholic university leaders express their support for Catholic schools

Create a means for new levels of collaboration between Catholic schools and Catholic universities focused on resourcing each other for the mission of the Church (Already started with ACE and other programs)

Create a means by which Catholic universities can establish a coordinated pipeline for development of Catholic school leaders from the Catholic classroom teacher to the Catholic superintendent

For diocese without a Catholic university, work with regional and national Catholic universities to make programs available to their Catholic school leaders and teachers

Use the resources of the business world to train school leaders in best business practices

Provide pastors with training in how to relate to Catholic schools and Catholic school principals

Provide training opportunities for Hispanic and other minorities to become Catholic school teachers and leaders

Establish a national internship program that brings priests into Catholic schools as learners about Catholic formation of children and youth

Create programs that prepare teachers specifically for Catholic schools that includes strong mentoring programs

CATEGORIES

RECOMMENDATIONS

MARKETING

Create a national interdisciplinary “tiger team” to coordinate marketing efforts by diocese across the country

Establish an effective national branding for Catholic schools
Create a national marketing campaign that can be locally applied and followed up

Join Catholic schools with national evangelization campaigns such as “Catholics Come Home”

A national campaign with the central message that academic achievement and spiritual development are connected

The achievements of Catholic schools with all kinds of students is the best kept secret in town: time we crowed loudly!

Use new media such as Twitter, You Tube and Facebook to market Catholic schools

ADVOCACY

Advocate with the White House for national scholarships applied to students regardless of school attended and for tax credit programs

Shift the language of “school choice” to that of “parental choice” at a national level. Fund a national office for this advocacy

Develop an “Advocacy Toolkit” and “Advocacy Training” for Catholic schools

Develop a national database that shows the success of Catholic schools with the poor and the marginalized, and use that in advocacy for private and government funding

Fund an advocacy program that is both proactive and aggressive
Enter into collaborative relationships with other faith based school networks for the purpose of advocacy

CATEGORIES**RECOMMENDATIONS****OTHER PRACTICES**

Create national means for collaborations that leverage economies of scale: Collective procurement, investment, health care, et al

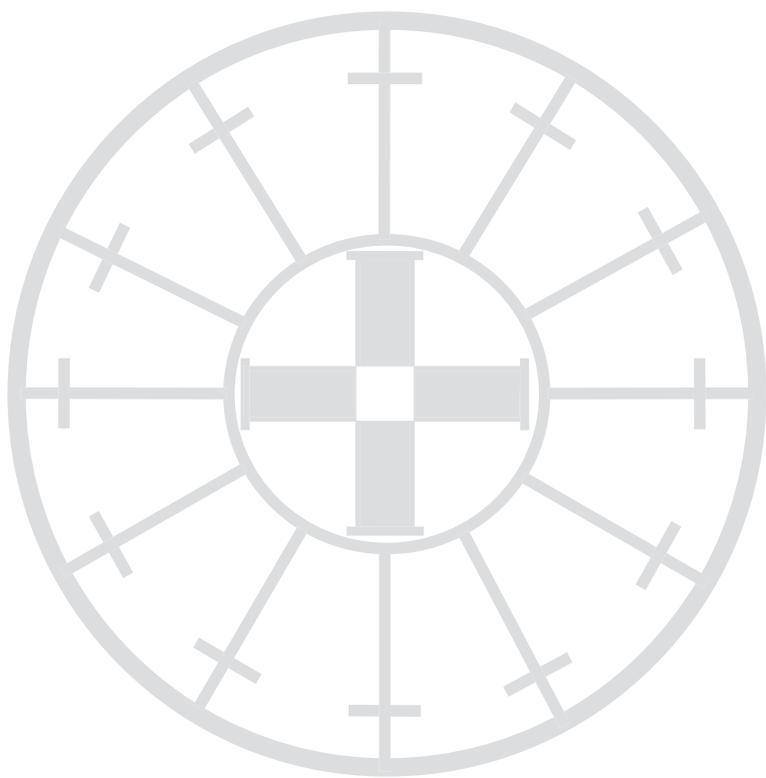
Identify best planning practices for Catholic schools that includes best use of data for decision making

Create virtual Catholic schools and/or hybrid Catholic educational models. Teach Catholic schools how to access government funding that is already available to them

Create a “toolbox” program for Catholic schools around hiring practices

Tailor tuition models to the populations served, especially to minority and rural populations

Identify best practices around the process of closing a Catholic School while maintaining commitment to Catholic schools



OBSERVATIONS ON CATHOLIC SCHOOLS IN THE US

Michele Cahill

Vice-President, National Program and Director of Urban Education, Carnegie Corporation of New York

The world is changing very rapidly, and education needs to change in more rapid ways than it ever has. So the challenge for all educators is to ensure a generation of young people reaches levels of academic capacity, motivation, self-confidence and effort toward academics that will enable them to make a decent living, but also to contribute to a vibrant democracy that has to change in a very pluralistic country.

I suggest that Catholic education is at a point where the mission needs to be very thoroughly examined, and examined from a couple of perspectives, including that of the changing world. Assess and create or restate what the value proposition is for Catholics and Catholic education. If we look at the history of Catholic education, Catholic schools were traditionally very good for immigrant populations, populations that were moving from working class to middle class in a society that was valuing education. Is the Catholic Church, or the Catholic education system, prepared to offer these resources to new generations of immigrants?

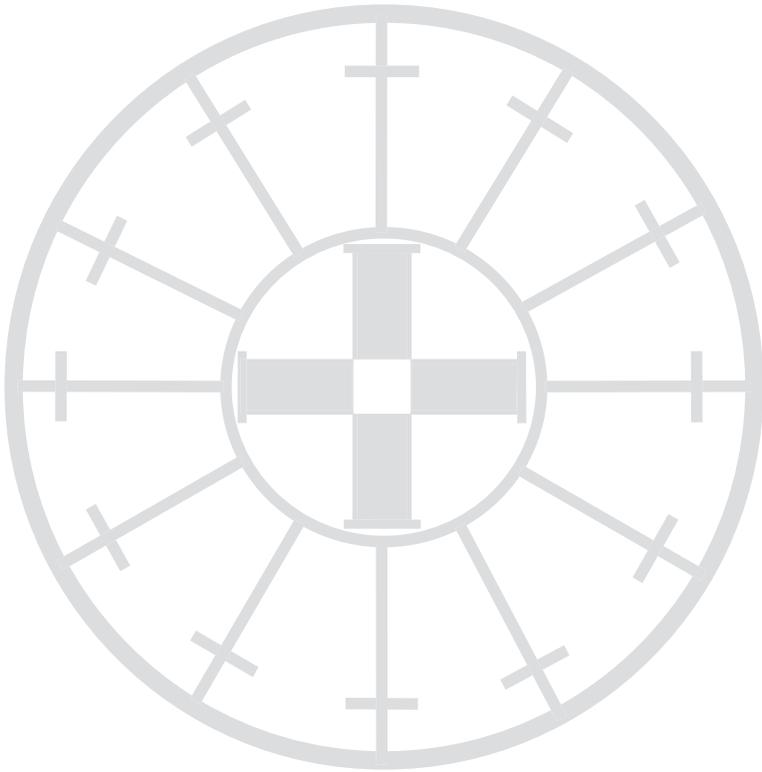
The group with the highest dropout rate, which is also the fastest growing demographic as a whole, is Latinos, many of whom are Catholic. So the Catholic school system, or Catholic educators, or the Catholic Church, needs to grapple with that major American challenge. On the positive side, Catholic schools may have solutions for the country on this.

There are three levels of change that I see in education reform in the country, and that I think would be useful for Catholic schools to be engaged with. One is standards. I suggest you enter the conversation nationally about the common core of standards, and how that fits with where Catholic schools want to go to. I say that for a couple of reasons. One is that there are going to be tons of resources connected with it.

The second is the talent strategy. I think this is really a different financial problem, but a very similar one. There's a lot going on in the country that would be useful for Catholic and public school reformers to be engaged regarding new, creative, innovative ways of building pipelines of principals and teachers, and a number of those things came up today.

Cristo Rey schools offer appeal far beyond the Catholic school realm, because they demonstrate a new, innovative model; the schools show a new way of taking the Catholic school approach of paying attention to both competencies and identity, the two tasks of adolescence, building competency and forming an identity, and linking it with the building of social capital for the kids. It focuses on getting all those adults who have invested in helping children make the transition from the identity that's pulling at them from the streets, or the identity that maybe they have to leave behind in their family, to a new one.

And finally, there is a broad and vibrant conversation in education reform circles around innovation similar to what was discussed at this meeting, such as uses of technology, networks of schools and schools for management design. There are venture fairs that are taking place, there are new schools conferences, and yet the conversation has very little presence from Catholic schools. This conversation would be a place where I think you could contribute, but also a place where I think you would learn a lot, build off of, and come to enrich the conversation you're having about the future.



2011 LEADERSHIP ROUNDTABLE BEST PRACTICES AWARDS

The Cristo Rey Network and Francis J. Butler, PhD

Kerry Robinson

Executive Director

National Leadership Roundtable on Church Management

When the Leadership Roundtable was founded we were clear that while it would always be our role to understand the precise nature and complexities of contemporary challenges facing the Church, our approach would consistently incorporate the intention to be positive. To be laudatory. To celebrate what works well in the Church. To encourage the widespread adoption in the Church of best practices, sound stewardship, transparency, accountability, ethics, excellence and innovation by holding up examples that exist in the Church. Our job is not to shame or chastise, to complain or lament, but the opposite: to be bearers of hope, witnesses to grace, advocates of the highest standards of excellence we know our Church is capable of achieving and emulating.

As part of our commitment to this central charism, we honor organizations and individuals with the Leadership Roundtable Best Practices Award.

One of our past recipients of the Best Practices Award is the Diocese of Memphis System of Catholic Schools whose formidable leader, Superintendent Dr. Mary McDonald is with us. In what has been called the “Memphis miracle,” the Diocese of Memphis has reopened 9 previously shuttered elementary schools in the poorest sections of the inner city. The alliance between the city’s civic, business, and philanthropic leaders in support of the Jubilee Catholic Schools has served as a model for other dioceses.

PRESENTATION TO THE CRISTO REY NETWORK



The 2011 Leadership Roundtable Best Practices Award for Innovation in Catholic Education was presented to The Cristo Rey Network. Geoffrey Boisi, far left, chair of the Leadership Roundtable, presented the award with Kerry Robinson, far right, executive director. Accepting the award on behalf of Cristo Rey was B.J. Cassin, second from left, president of the Cassin Educational Foundation; Robert Birdsell, center, president and CEO of Cristo Rey; and Rev. John Foley, SJ, second from right, executive chair.

Every one of us can remember what it was like to be a child attending school and how formative those years of our lives and education were. We experience it anew in our children and grandchildren, our nieces and nephews, our neighbors. We know the difference a quality education and character formation makes.

As Catholics we place a premium on the common good. So it is not enough—never enough—that only we have access to quality education, but that all have access and in a preferential way, the poorest and most marginalized. On January 27, 2010, President Obama said in his state of the union address, “the best anti-poverty program is a world class education.”

Clearly there is something that pulls at the Catholic imagination when one thinks about the role of Catholic school systems, in our inner cities, breaking the cycle of poverty.

Earlier this year I was invited by Fr. John Swope, president of Cristo Rey Jesuit High School in Baltimore, to have dinner with Fr. John Foley, Rob Birdsell and him. Now I knew each of these remarkable men by reputation and had met Fr. Foley and Fr. Swope many years ago. I felt like the Trinity was inviting me to dinner. And what a dinner we had. Their professional accomplishments are breathtaking, but I want to note what truly good men these three are. It seems to be par for the course for those involved and invested in Cristo Rey. They radiate joy and compassion and purpose. There is a holiness about them which they are immediately quick to dismiss. A sign of genuine humility and, actually, holiness. I left that dinner full of the love of humankind, inspired to be a better person, grateful for the concrete example of grace at work and hope in action, and a restored confidence in the goodness of people and life. That meal and fellowship was sacramental in the best Catholic understanding of that term.

The Cristo Rey Network of schools was founded in 2001, and educates over 6,500 students, representing a wealth of faiths, in 17 states and the District of Columbia, all of whom earn acceptance into a two- or four-year college or university. Students of color comprise 95% of Cristo Rey's student population, and students come from households with an average annual income of \$36,000.

In 2000, B.J. Cassin, a member of the Leadership Roundtable and a personal hero of mine, and his wonderful wife, Bebe, made a \$12 million commitment through the Cassin Educational Initiative Foundation to replicate the original Cristo Rey Jesuit High school in Chicago. The Bill & Melinda Gates Foundation followed in 2003 with a commitment of \$10 million for the expansion of the new Cristo Rey Network, and a subsequent investment in 2006 of \$6 million. Today, there are 24 Cristo Rey schools.

Just a side note and an elegant reminder from a Catholic imagination on how interconnected everything in life is. I can remember being introduced to the original Cristo Rey high school in Chicago, and meeting Fr. Foley and B.J. Cassin for the first time. B.J. and I both serve on the board of FADICA, brought together by its president, Frank Butler, our other honoree tonight. The members of FADICA have been involved in philanthropy for decades and have seen and funded remarkable new initiatives over those decades. There is no doubt in my mind that among the most exciting, innovative and game-changing philanthropic examples we were privy to was the creation and expansion of Cristo Rey, and B.J. showed us how it could be done impeccably, thoughtfully, with exacting standards leading to great effectiveness.

Cristo Rey schools are hopeful examples of what Catholic education can achieve when people and institutions pull together, both intellectually and financially, to support students and the communities where they live. The Leadership Roundtable honors both the Cristo Rey Network's commitment to embrace innovation, and in a special way, its dedication to support urban students who have limited access to adequate college preparation. Accepting the award for The Cristo Rey Network is founder and executive chair, Fr. John Foley, SJ, and president and CEO, Rob Birdsell.

PRESENTATION TO FRANCIS J. BUTLER, PHD



The 2011 Leadership Roundtable Best Practices Award for Lay Leadership was presented to Francis J. Butler, PhD, center. Geoffrey Boisi, left, chair of the Leadership Roundtable, conferred the award with Kerry Robinson, right, executive director.

Frank Butler's professional contribution and service to the Church over the entire course of his adult life is a powerful testament to the extraordinary difference one person can make toward advancing the mission of the Church. He is a model of lay leadership and a personal inspiration to all those who know him and have had the privilege of working with him.

Frank has directed FADICA (Foundations and Donors Interested in Catholic Activities, Inc.) for 31 years as the consortium has played an influential role in developing and forming a community of philanthropists who share a vision of charity, justice, and human dignity. Prior to this, Frank was domestic policy director at the United States Conference of Catholic Bishops where he served for 8 years following two years of service on committee staff

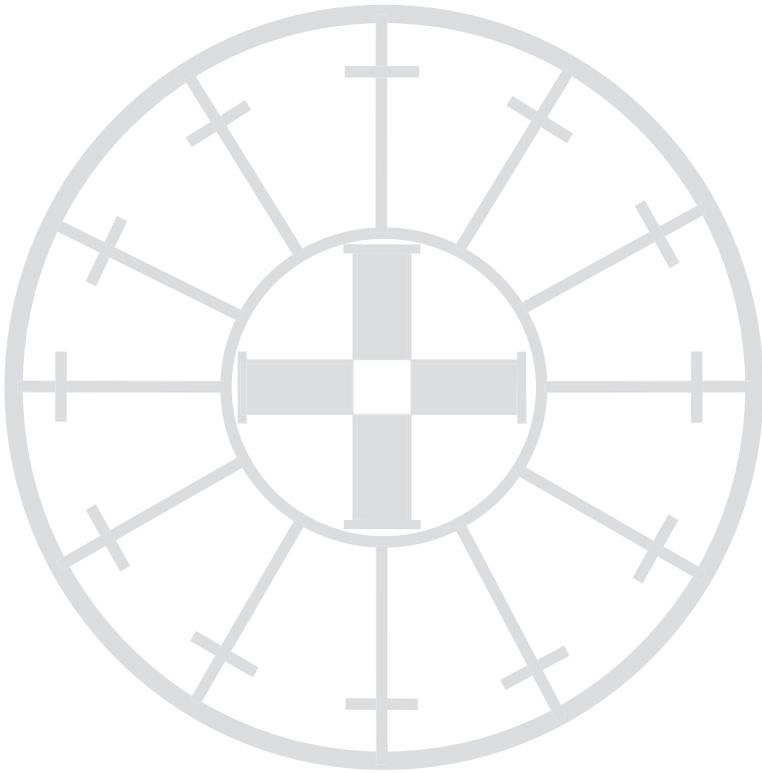
of the US Congress. He is a frequent commentator on the world of religious philanthropy and has played a leadership role in the founding of several charitable organizations in the US, including Support Our Aging Religious (SOAR), the Center for the Study of Church Management at Villanova University, the Catholic Program of Aid to the Church in Eastern and Central Europe, and The National Religious Retirement Office. In addition, Frank has served as Consulter to the Pontifical Council for the Laity of the Vatican. Nearest and dearest to my heart, however, is the vital role Frank played in the creation and development of the National Leadership Roundtable on Church Management. Frank has been an essential “go to” source and adviser and founding trustee of this effort. From the very beginning as we set out to determine how best to help the Church attend to contemporary temporal challenges.

Presentation of the award to Dr. Butler

Frank, your accomplishments over the whole course of your adult life have been of enormous benefit to the Catholic Church. You have created the conditions for Catholic philanthropists to be better educated about the needs of the Church and inspired countless families and foundations to exercise their philanthropy in service to the Church with grace and effectiveness. So much of what is best and innovative and beneficial to the Church and those the Church serves has your fingerprint, your influence, your mark.

You manage to do all of this, so expertly and well, and also have an extraordinary marriage to Fran, three beautiful adult children, and an ever-expanding number of grandchildren. A rich and blessed life, that you have so clearly honored by being a blessing to others and most especially to the Church at the local, diocesan, national and international level. Thank you.

On a personal note, you have been my mentor for all of my adult life. Without your guidance and encouragement, I would not be dedicating my life in service to the Church. Few people know this, but it was Frank who first and wholeheartedly encouraged me to accept the invitation to work with Fr. Bob Beloin to expand Catholic life on Yale’s campus when I did not want to have anything to do with fundraising. That decision, in Yale’s favor, changed the course of my life, radically altered my understanding and appreciation of development and introduced me to one of my greatest friends and colleagues in life. Similarly, in 2003 Frank called me and said, “I have the perfect person for you to meet, Kerry. His name is Geoff Boisi.” The very best opportunities I have had to serve the Church have always been with your blessing and encouragement, Frank. I know you play this role for countless others. We, and the Church, are better for such encouragement.



National Leadership Roundtable on Church Management

2011 ANNUAL MEETING AGENDA

From Aspirations to Action: Solutions for America's Catholic Schools
June 22-23, 2011
Georgetown University, Washington, DC

Creating sustainable models for our schools is a formidable challenge, one that must encompass the best ideas from every sector. Together, we intend to harness the collective contributions, models of success, salient insights and best practices to save and strengthen Catholic school systems, ensuring that future generations of students will continue to have access to the gifts of Catholic education.

This gathering of Catholic leaders seeks to capture the best ideas for our schools and create 15-20 recommendations that the Church can implement immediately to ensure Catholic schools are healthy and sustainable. The meeting will be highly participatory through a series of working sessions designed to give voice to the perspective and insight of all participants.

Sponsored by Faith Direct and Changing Our World, Inc.

Wednesday, June 22

1:30pm.....Registration

Fisher Colloquium, Rafik B. Hariri Building, McDonough School of Business

2:00pm.....Opening Prayer

Fisher Colloquium, Rafik B. Hariri Building, McDonough School of Business
Mary Claire Ryan, Executive Director, NativityMiguel Network of Schools

Welcome and Introduction

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

2:15pm.....Activities and Accomplishments:

Achievements of the Leadership Roundtable

Kerry A. Robinson, Executive Director, National Leadership Roundtable on
Church Management
Rev. Edward A. Malloy, CSC, President Emeritus, University of Notre Dame
Victoria Reggie Kennedy, Trustee, National Leadership Roundtable on
Church Management
Geoffrey T. Boisi, Chair and CEO Roundtable Investment Partners, LLC

2:45pm.....Plenary Session: Strategic Input

3:15pm.....Break

Shea Undergraduate Commons

3:30pm.....Setting the Stage for Impactful Advocacy: Why Catholic Schools Matter and What is Needed to Save Them

Moderator: John Eriksen, Superintendent, Diocese of Paterson
Christine Healey, Executive Director, International Education Foundation
Francis J. Butler, President, Foundations and Donors Interested in
Catholic Activities

4:10pm.....Plenary Session

5:00pm.....Adjourn

5:30pm.....Celebration of the Eucharist

Dahlgren Chapel

Principal celebrant: Most Rev. Joseph E. Kurtz, Archbishop of Louisville
and Vice President, United States Conference of Catholic Bishops

6:30pm.....Reception

Georgetown University Hotel & Conference Center

7:30pm.....Awards Banquet

Georgetown University Hotel & Conference Center

Invocation:

Rev. Robert L. Beloin, Chaplain, Saint Thomas More Catholic Chapel
and Center at Yale University

Honorees: The Cristo Rey Network, recipient, Leadership Roundtable
Best Practices Award for Innovation in Catholic Education, accepted by
Rev. John Foley, SJ and Robert Birdsell, Francis J. Butler, Ph.D, recipient,
Leadership Roundtable Best Practices Award for Exemplary Lay Leadership

Thursday, June 23

7:30am.....Continental Breakfast

Shea Undergraduate Commons

8:00am.....Work Groups

Breakout rooms, Rafik B. Hariri Building, McDonough School of Business

Facilitators:

Robert Birdsell, President and CEO, Cristo Rey Network

Sr. Kathleen Carr, CSJ, Senior Associate Director, ACE Consulting,
University of Notre Dame

Margaret Dames, Superintendent, Diocese of Bridgeport

Thomas Groome, Director, Institute of Religious Education
and Pastoral Ministry, Boston College

Mary Ellen Hrutka, Executive Director, Mid-Atlantic Consortium

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

Kathleen Mahoney, Consultant

Mary McDonald, Superintendent, Diocese of Memphis

Jane B. O'Connell, President, Altman Foundation

Lorraine Ozar, Director, Center for Catholic School Effectiveness,
Loyola University, Chicago

Stephen Perla, Director, ACE Consulting, University of Notre Dame

9:30am.....Break

Shea Undergraduate Commons

**9:45am.....Toward a Culture of Excellence: Management, Finances
and Human Resources for the Future of Catholic Schools**

Fisher Colloquium

Moderator: John Eriksen, Superintendent, Diocese of Paterson
B.J. Cassin, President, Cassin Educational Initiative Foundation
Richard Burke, President, Catholic School Management, Inc.

10:15am..... Plenary Session

10:45am..... Break

Shea Undergraduate Commons

11:00am..... Work Groups Reconvene

Breakout rooms

12:15pm..... Lunch

Shea Undergraduate Commons

1:30pm..... Work Groups Reconvene

Breakout rooms

2:30pm..... Break

Shea Undergraduate Commons

2:45pm..... Presentation of Workgroup Deliberations and Draft Recommendations

Fisher Colloquium

Michele Cahill, Vice-President, National Program, and Director of
Urban Education, Carnegie Corporation of New York
Thomas Healey, President, Healey Development

3:45pm..... Conclusion

Fisher Colloquium

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

4:00pm Adjournal

A NOTE ON WORKING GROUPS

A crucial goal of our June gathering is to capture 15-20 recommendations to form an action plan of immediate next steps toward addressing and solving the Catholic school crisis, nationally. To achieve this, we are assembling many of the country's top contributors in the field of Catholic schools, from diverse perspectives. Some will provide input to stimulate our discussion; others will be active contributors to the working groups. Our objective is to capture the most salient observations, best practices and creative ideas from all partici-

participants. To accomplish this in the most stimulating and effective manner, we have identified 10 facilitators whose leadership will help to capture these ideas for publication, distribution, and implementation.

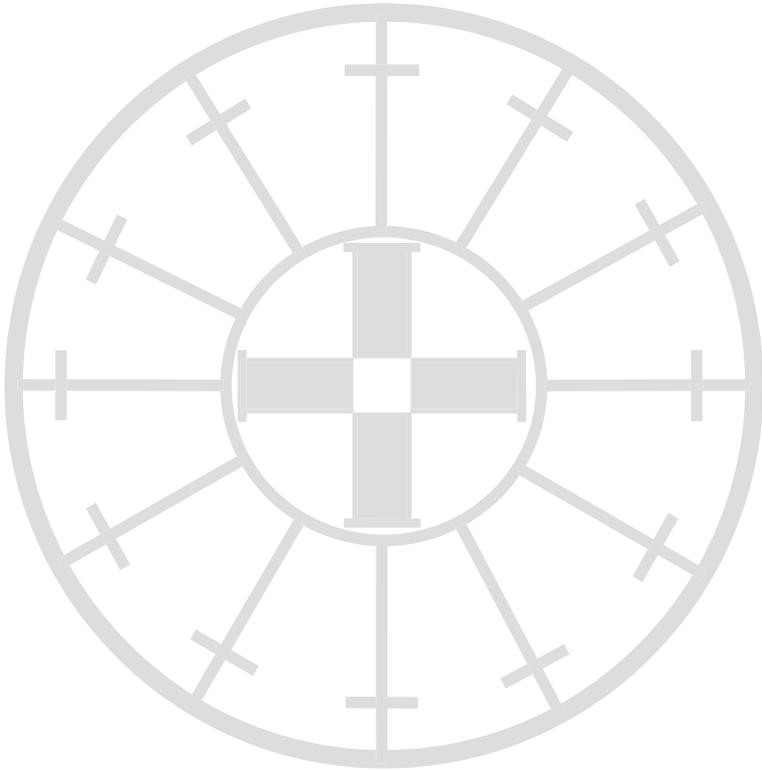
We have 10 working groups (of 10-12 people) and three working group sessions. Each facilitator will begin each of the three workgroup sessions with a 5 minute introduction on critical insights drawn from his or her area of expertise in Catholic education and the panel presentations. The reflections will set the stage for provocative discussion leading to concrete recommendations which will also be recorded and woven into the final action plan.

Ten to fifteen minutes before the end of each working session, a maximum of 3 ideas should be captured and passed along to Leadership Roundtable staff for inclusion in our final plenary session. Please note, the recommendations must be clear, achievable, realistic, innovative, concrete and practical. When possible, they should identify who is tasked with the action and how it would be funded.

Finally, each working group will have its own specific set of focus questions allowing for rigorous discussion on the key topics, such as those listed below, divided among the groups and sessions:

- National communications/public relations campaign for Catholic schools
- Advocacy
- Managerial best practices/central clearinghouse of information, institutions and ideas
- Demographic considerations: new and emerging Catholic populations
- The leadership deficit
- The role of Catholic higher education in the solution
- Innovation/strategic alliances
- Financial solutions toward sustainability
- Public/private options, the charter model
- Rural, urban, suburban considerations





2011 ANNUAL MEETING PARTICIPANTS

Richard Abdo is President of R.A. Abdo & Co., LLC.

Jeanne Allen is President of The Center for Education Reform.

James Alphen is Executive Director of The National Organization for Continuing Education of Roman Catholic Clergy.

Rev. John Beal is Professor of Canon Law at The Catholic University and a trustee of the National Leadership Roundtable on Church Management.

Rev. Robert Beloin is Chaplain at Saint Thomas More Catholic Chapel & Center at Yale University.

Thomas Bertlesen, Jr is CFO at Sisters of St. Dominic, Congregation of the Most Holy Name.

Robert Birdsell is President and CEO of The Cristo Rey Network.

Betsy Bliss is Managing Director at JP Morgan and a Trustee of the National Leadership Roundtable on Church Management.

Geoffrey Boisi is Chairman and CEO of Roundtable Investment Partners, LLC and Chairman of the Board of the National Leadership Roundtable on Church Management.

Joseph Boland is Senior Director of Grants Management at the Catholic Church Extension Society.

Margaret Boland is Associate Superintendent for the Diocese of Trenton.

Alexander Boucher is Project Administrator for CatholicPastor.org.

Michael Brough is Director of Planning & Programs at The National Leadership Roundtable on Church Management.

Richard Burke is President of Catholic School Management, Inc.

Tom Burnford is Secretary for Education for the Archdiocese of Washington.

Francis Butler is President of FADICA and a Trustee of the National Leadership Roundtable on Church Management.

Rev. William Byron is Professor of Business and Society at St. Joseph's University.

Michele Cahill is Vice President, National Program, and Program Director, Urban Education, at the Carnegie Corporation.

Samuel Casey Carter is Executive Director at HMH Foundation.

Sr. Kathleen Carr, CSJ is Senior Associate Director at ACE Consulting.

Brendan Cassin is President of the Cassin Educational Initiative Foundation.

Dennis Cheesebrow is President of TeamWorks Intl.

Brian Crimmins is CEO at Changing Our World, Inc.

Lou Cuoco is president of Louis Communications, Inc.

Daniel Curtin is Executive Director at the NCEA Department of Chief Administrators of Catholic Education.

Margaret Dames is Superintendent of Schools for the Diocese of Bridgeport.

Carlos De La Rosa is Program Officer at Porticus North America Foundation.

Michael Deegan is Associate Superintendent of Schools for Urban Education for the Archdiocese of New York.

Rev. James Deiters is Pastor at St. Clare Parish and School, O'Fallon, IL.

Peter Denio is Standards for Excellence Project Manager at the National Leadership Roundtable on Church Management.

Antonio DeSapio is President at Saint Gregory the Great High School in Chicago, IL.

Gregory Dhuyvetter is Superintendent of Schools for the Diocese of Orange.

Edward Dolejsi is Executive Director of the California Catholic Conference.

Rev. Frank Donio, SAC is Vicar Provincial of the Pallottines and Project Coordinator of CatholicPastor.org.

Mary Doorley is Director of Development at the National Leadership Roundtable on Church Management.

Lt. Gen. (Ret.) James Dubik is a retired officer in the US Army and a Trustee of the National Leadership Roundtable on Church Management.

Most Rev. Michael G. Duca is Bishop of Shreveport.

Sr. Judith Dugan is Director of CSJ Educational Network.

John Eriksen is Superintendent of Schools for the Diocese of Paterson.

Deb Estes is Chairman & President of the Specialty Family Foundation.

Lynn D. Finn is a Dame of Malta.

Joseph F. Finn, Jr. is owner of and partner at Finn, Warnke & Gayton.

Carol Fowler is Director of Personnel Services for the Archdiocese of Chicago and a Trustee of the National Leadership Roundtable on Church Management.

Martha Frauenheim is Superintendent of Schools for the Archdiocese of Saint Paul & Minneapolis.

James Friend is Director of Stewardship and Development for the Diocese of Allentown.

Philip Fromuth is Secretary for Catholic Education for the Diocese of Allentown.

Daniel Gast is Director of INSPIRE in the Archdiocese of Chicago.

Rev. Thomas Gaunt, SJ is Executive Director at CARA at Georgetown University.

Susan George is Executive Director at Inner-City Scholarship Fund.

Gregory Geruson is Director of the Catholic School Development Program.

Charles Geschke is Chairman of Adobe Systems and a trustee of the National Leadership Roundtable on Church Management.

Erik Goldschmidt is Executive Vice President of FADICA.

Thomas Groome is Director of the Institute of Religious Education and Pastoral Ministry at Boston College.

Sr. Ellen Hagar is President of Elizabeth Seton High School, Bladensburg, MD.

Joshua Hale is Executive Director of the Big Shoulders Fund.

Msgr. Kevin Hanbury is Vicar for Education and Superintendent of Schools for the Archdiocese of Newark.

Rev. Abbot Giles Hayes, OSB is president-elect of the Conference of Major Superiors of Men and Abbot of St. Marys Abbey/Delbarton.

Thomas Healey is President of the Healey Family Foundation and Treasurer of the National Leadership Roundtable on Church Management.

Christine Healey is Executive Director of the International Education Foundation.

Rev. J Bryan Hehir is Secretary for Health and Social Services for the Archdiocese of Boston and a trustee of the National Leadership Roundtable on Church Management.

Mary Ellen Hrutka is Executive Director of the Mid-Atlantic Catholic Schools Consortium.

Sr. Mary Johnson is Professor of Sociology at Emmanuel College.

Jill Kafka is Executive Director of The Partnership for Inner-City Education.

Cathleen Kaveny is John P. Murphy Foundation Professor of Law and Professor of Theology at the University of Notre Dame.

Rev. Kevin Kennedy is Adjunct Professor at The Catholic University.

Victoria Reggie Kennedy is a Trustee of the National Leadership Roundtable on Church Management.

Susan King is Vice President for External Affairs at the Carnegie Corporation and a Trustee of the National Leadership Roundtable on Church Management.

Anthony Klemmer is President & Founder of the Center for Better Schools.

Rev. Mr. William Koniers is President of CathoNet, Inc.

Most Rev. Joseph Kurtz is Archbishop of Louisville and Vice President of the USCCB.

Mark Lieberman serves on a Catholic Schools task force for the Diocese of Allentown.

James Lindsay is Executive Director at the Catholic Volunteer Network.

Jim Lundholm-Eades is Director of Parish Services and Planning for the Archdiocese of St. Paul and Minneapolis.

Msgr. James Mahoney is Vicar General in the Diocese of Paterson.

Kathleen Mahoney is lead consultant on the Leadership Roundtable Catholic schools initiative.

Rev. Edward Malloy is President Emeritus of the University of Notre Dame and a Trustee of the National Leadership Roundtable on Church Management.

Kathleen McChesney is CEO at Kinsale Management and a Trustee of the National Leadership Roundtable on Church Management.

Patrick McCloskey is Director of Finding Solutions for Catholic Schools at Loyola University Chicago.

Mary McDonald is Superintendent of Schools for the Diocese of Memphis.

James McDonough is Chancellor for the Archdiocese of Boston.

Kevin McGowan is CFO at the Catholic Church Extension Society.

Patrick McGrory is Chairman of the Board at the Raskob Foundation for Catholic Activities.

Sr. Bernadette McManigal is Superintendent of Schools for the Diocese of Arlington.

Alan Meitler is Consultant at Meitler Consultants.

Terri Mendoza is principal at St. Joseph High School in Lakewood, CA.

Mark Mogilka is Director of Stewardship Pastoral Services for the Diocese of Green Bay.

Michael Montelongo is Senior Vice President and Chief Administrative Officer at Sodexo.

Gavan Mooney is Senior Managing Director at Changing Our World, Inc.

Rev. Robert Morris is Vicar General for the Diocese of St. Petersburg.

Anthony Mullen is President of Porticus North America Foundation.

Rev. Robert Niehoff, SJ is President of John Carroll University.

Joan Neal is Vice President at Cabrini College.

Rev. Paul Novak is President of the De La Salle Institute.

Jane O'Connell is President of the Altman Foundation.

Br. Michael O'Hern, FSC is CEO at Christian Brothers Investment Services.

Maureen O'Leary is President at the William M. & Miriam F. Meehan Foundation, Inc.

Michael O'Loughlin is Communications Manager at The National Leadership Roundtable on Church Management.

Lorraine Ozar is Director of the Center for Catholic School Effectiveness at Loyola University Chicago.

Stephen Perla is Senior Director at ACE Consulting.

Peter Persuitti is Managing Director, Religious Practice at Arthur J. Gallagher & Co.

Kim Pryzbylski is Superintendent/Senior Director of Faith Formation for the Archdiocese of Miami.

Br. Michael Quirk, FSC is President and CEO at Christian Brothers Services.

Paul Reilly is CEO of Raymond James Financial, Inc. and a Trustee of the National Leadership Roundtable on Church Management.

Karen Ristau is President of the National Catholic Educational Association.

Kerry Robinson is Executive Director of the National Leadership Roundtable on Church Management.

Gerard Roche is Senior Chairman at Heidrick & Struggles.

Lorraine Russo is executive assistant at Roundtable Investment Partners, LLC.

Mary Claire Ryan is Executive Director of the NativityMiguel Network of Schools.

Michael Schierl is Managing Partner at ImmacuLaw.

Msgr. Alfred Schlert is Vicar General for the Diocese of Allentown.

Sr. Katarina Schuth holds the Endowed Chair for the Social Scientific Study of Religion at St. Paul Seminary.

John Peter Simon is Co-Chairman at William E. Simon & Sons.

Rev. Thomas Smolich, SJ is President of the Jesuit Conference USA.

JoAnn Tier is Superintendent of Schools for the Diocese of Trenton.

Skip Torresson is President of The Stewardship Group.

Rev. Jeffrey von Arx, SJ is President of Fairfield University.

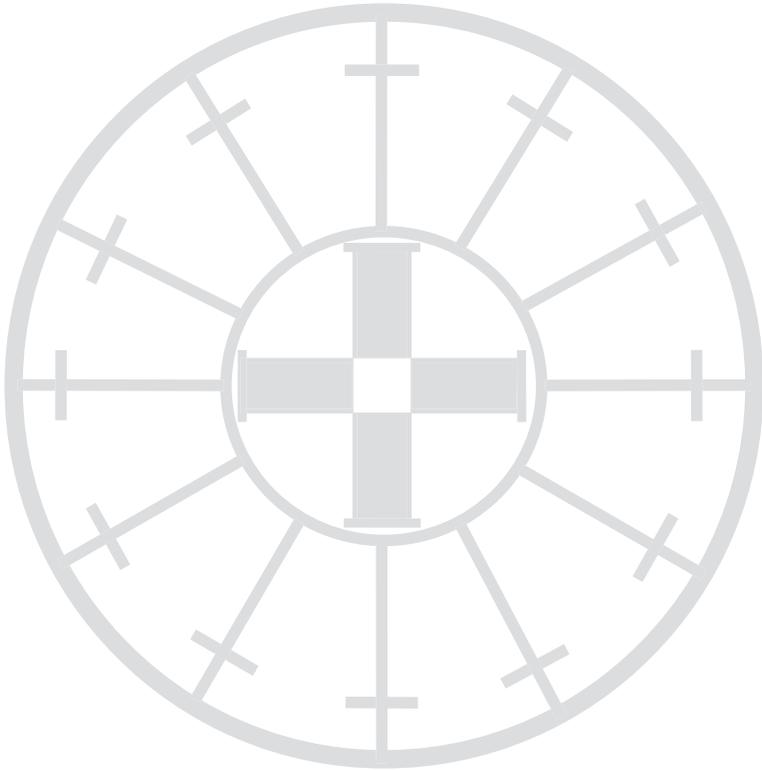
Rev. Mr. Walter Wakefield is CFO for the Catholic Diocese of Lexington.

Kevin Watson is Office Manager at the National Leadership Roundtable on Church Management.

Patricia Weitzel O'Neill is Executive Director at the Roche Center for Catholic Education at Boston College.

William Whitaker is Board Chair of the NativityMiguel Network of Schools.

Jeffery Young is a board member of the Catholic Business Owners Alliance in the Diocese of Allentown.



National Leadership Roundtable on Church Management

COUNCIL MEMBER BIOGRAPHIES

Mr. Richard A. Abdo is president of R.A. Abdo & Company, LLC and the retired chairman and CEO of the Wisconsin Energy Corporation.

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

Mr. Joseph Amato is president of the Amato Family Foundation.

Mr. Robert M. Amen is chairman and CEO of International Flavors and Fragrances, Inc.

Mr. Christopher Anderson is executive director of the National Association of Lay Ministry.

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

Mr. William F. Baker is president emeritus of Thirteen WNET.

Rev. John P. Beal is professor in the School of Canon Law at the Catholic University of America, and a member of the Board of the National Leadership Roundtable on Church Management.

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

Ms. Betsy Bliss is managing director for JP Morgan and a member of the Board of the National Leadership Roundtable on Church Management.

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

Mr. Joseph J. Bonocore is chairman and CEO of Impresa Technologies.

Mr. Kurt Borowsky is chairman of Van Beuren Management and chairman of the Seton Hall University Board of Regents.

Dr. Mary M. Brabeck is dean of the Steinhardt School of Culture, Education, and Human Development at New York University and a member of the Board of the National Leadership Roundtable on Church Management.

Mr. Anthony Brenninkmeyer is former CEO of American Retail Group and a member of the Boards of FADICA and the National Leadership Roundtable on Church Management.

Ms. Kathleen Buechel is retired president of Alcoa Foundation and senior lecturer at the University of Pittsburgh's Graduate School of Public and International Affairs.

Ms. Anne Burke is an associate at Gunster, Yoakley & Stewart.

Judge Anne Burke is a justice for the Illinois Supreme Court.

Mr. Richard J. Burke is president of Catholic School Management, Inc.

Dr. Francis Butler is president of Foundations and Donors Interested in Catholic Activities (FADICA)

and secretary of the Board of the National Leadership Roundtable on Church Management.

Rev. William J. Byron, SJ is Professor of Business and Society at St. Joseph's University.

Mr. Nicholas P. Cafardi is dean of Duquesne University Law School.

Dr. Lisa Cahill is J. Donald Monan, SJ Professor of Theology at Boston College.

Judge Guido Calabresi is Sterling professor of law emeritus and former dean of the Yale Law School, and a Judge on the U.S. Court of Appeals, Second Circuit.

Mr. John Caron is retired president of Caron International.

Mr. Gregory Case is president and CEO of Aon Corporation and a member of the Board of the National Leadership Roundtable on Church Management.

Mr. B.J. Cassin is chairman and president of the Cassin Educational Initiative Foundation.

Dr. Anthony J. Cerneria is president emeritus of Sacred Heart University.

Dr. Arturo Chavez is president and CEO of the Mexican American Catholic College, Inc.

Mr. Michael D. Connelly is president and CEO of Catholic Healthcare Partners in Cincinnati, OH.

Mr. John M. Connors, Jr. is chairman and CEO of Hill, Holiday, Connor, and Cosmopolos.

Mr. Michael Cote is CEO of SecureWorks.

Ms. Mary Cunningham Agee is president and founder of the Nurturing Network.

Mr. John P. Curran is a trustee of the John P. and Constance A. Curran Charitable Foundation.

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

Mr. James Davidson is professor of sociology at Purdue University.

Dr. John DeGioia is president of Georgetown University.

Dr. John D. Dilulio is professor of Law at the University of Pennsylvania and founder of the Center for Research on Religion and Urban Civil Society.

Rev. Edmund J. Dobbin is president emeritus of Villanova University.

Mr. Ned Dolejsi is executive director of the California Conference of Catholic Bishops.

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

Dr. Charles Dougherty is president of Duquesne University.

Rev. Edward Dougherty, MM is superior general of the Maryknoll Fathers & Brothers.

Lt. General James Dubik is a retired officer in the U.S. Army and a member of the Board of the National Leadership Roundtable on Church Management.

Sr. Karin Dufault, SP, PhD, RN is executive director of the Supportive Care Coalition.

Rev. Robert D. Duggan is a researcher at The Catholic University of America.

Ms. Cynthia Lee Egan is president of retirement plans at T. Rowe Price.

Ms. Elizabeth Eisenstein is a member of the Amaturio Family Foundation and a member of FADICA.

Sr. Janet Eisner, SND is president of Emmanuel College.

Dr. Mary Jane England is president of Regis College.

Sr. Sharon Euart, RSM is executive coordinator of the Canon Law Society of America.

Dr. Geno Fernandez is partner at McKinsey & Company.

Mr. Joseph F. Finn is a partner of Finn, Warnke & Gayton.

Mr. Peter M. Flynn is chief financial officer for the Diocese of Fort Worth.

Dr. Carol Fowler is director of the Department of Personnel Services for the Archdiocese of Chicago and a member of the Board of the National Leadership Roundtable on Church Management.

Ms. Zeni Fox is professor at Seton Hall University.

Dr. Norman Francis is president of Xavier University of Louisiana in New Orleans, Louisiana and a member of the Board of the National Leadership Roundtable on Church Management.

Mr. William P. Frank is senior partner at the law firm Skadden, Arps, Meagher & Flom LLP.

Dr. Michael Galligan-Stierle is president and CEO of the Association of Catholic Colleges and Universities.

Rev. Michael J. Garanzini, SJ is president of Loyola University Chicago.

Rev. Thomas Gaunt, SJ is executive director of the Center for Applied Research in the Apostolate.

Dr. Charles Geschke is chairman of the Board of Adobe Systems, Inc. and a member of the Board of the National Leadership Roundtable on Church Management.

Ms. Susan Gianinno is chair and CEO of Publicis USA.

Mr. Frederick W. Gluck is former managing director of McKinsey & Co. Inc. and a member of the Board of the National Leadership Roundtable on Church Management.

Sr. Maria Elena Gonzalez, RSM is former president of the Mexican American Cultural Center in San Antonio, TX and a consultant to the U.S. Bishops' Committee on Hispanic Affairs.

Sr. Doris Gottemoeller, RSM is senior vice-president, Mission Values Integration for Catholic Healthcare Partners.

Sr. Katherine Gray, CSJ is former general superior of the Sisters of St. Joseph of Orange.

Dr. Thomas Groome is director of the Institute of Religious Education and Pastoral Ministry at Boston College.

Dr. Mary Ann Gubish is director of the Department for Envisioning Ministry for the Diocese of Pittsburgh.

Mr. Michael J. Guerra is past president of the National Catholic Education Association.

Mr. Ken Hackett is executive director of Catholic Relief Services.

Dr. Patrick T. Harker is president of the University of Delaware.

Msgr. Tom Hartman is former director of radio and television for Telecare.

Dr. Alice B. Hayes is retired president of the University of San Diego.

Abbot Giles P. Hayes, OSB is president-elect of the Conference of Major Superiors of Men.

Mr. Thomas Healey is Partner at Healey Development and Treasurer of the National Leadership Roundtable on Church Management.

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

Mr. James Higgins is senior advisor for Morgan Stanley.

Rev. Michael Higgins, CP is provincial superior of the Congregation of the Passion, Holy Cross Province, and president of the board of directors.

Ms. Lori Hrick is former executive vice-president of JP Morgan Chase Bank.

Rev. John Hurley, CSP is director of the Department of Evangelization for the Archdiocese of Baltimore.

Dr. Frank J. Ingrassia is former managing director at Goldman, Sachs & Company.

Msgr. Thomas P. Ivory is pastor emeritus of the Church of the Presentation.

Dr. Marti Jewell is former director of the Emerging Models of Pastoral Leadership Project.

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

Br. Thomas Johnson, FSC is Vicar General of the Institute of the Brothers of the Christian Schools.

Mr. Thomas Johnson is chairman and CEO of Greenpoint Financial Corp.

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

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

Mr. John R. Kennedy is president of JRK Financial Corp.

Mrs. Victoria Reggie Kennedy is a member of the Board of the National Leadership Roundtable on Church Management.

Rev. J. Cletus Kiley is director for immigration policy for UNITE HERE.

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

Ms. Catherine R. Kinney is former president and co-chief of operations of the New York Stock

Exchange.

Ms. Dolores Leckey is senior fellow at the Woodstock Theological Center and an advisor to the United States Catholic Bishops.

Mr. James T. Lenehan is a former executive with Johnson and Johnson.

Rev. Paul Lininger, OFM Conv. is executive director of the Conference of Major Superiors of Religious Men.

Mr. T. Michael Long is a partner at Brown Brothers Harriman.

Mr. Jim Lundholm-Eades is director of planning for the Archdiocese of St. Paul and Minneapolis.

Dr. Mary E. Lyons is president of the University of San Diego.

Mr. Frank J. Macchiarola is president emeritus of St. Francis College in New York.

Mr. Michael Madden is principle partner at BlackEagle Partners, LLC.

Msgr. James T. Mahoney is Vicar General and Moderator of the Curia of the Diocese of Paterson.

Kathleen Mahoney is lead consultant on the Leadership Roundtable Catholic schools initiative.

Rev. Edward A. Malloy, CSC is president emeritus of the University of Notre Dame and is a member of the Board of the National Leadership Roundtable on Church Management.

Ms. Josephine C. Mandeville is president of the Connelly Foundation.

Mr. Alfred Martinelli is former chairman of the Buckeye Pipeline Company.

Mr. John H. McCarthy, CPA is senior fellow at the Hauser Center at Harvard University.

Ms. Margaret W. McCarty is former executive director of EPS.

Ms. Elizabeth McCaul is a partner at Promontory Financial Group and partner-in-charge of the New York office.

Ms. Kathleen McChesney is CEO of Kinsale Management Consulting and is a member of the Board of the National Leadership Roundtable on Church Management.

Mr. Owen McGovern is president of Catholic Solutions.

Mr. Patrick McGrory is chair of the Raskob Foundation for Catholic Activities, Inc.

Ms. Anne McNulty is a private investor.

Rev. Joseph M. McShane is president of Fordham University.

Mr. Charles Millard is director of the Pension Benefit Guaranty Company.

Sr. Patricia Mitchell, SFCC is executive director of Silicon Valley FACES.

Sr. Janet Mock, CSJ is director of the Institute for Leadership and Catholic Mission, WTU.

Rev. J. Donald Monan, SJ is the chancellor of Boston College and is a member of the Board

of the National Leadership Roundtable on Church Management.

Mr. Michael Montelongo is senior vice-president of strategic marketing for SODEXHO, Inc.

Mr. Paul M. Montrone is chairman and CEO of Fisher Scientific International, Inc.

Dr. Carol Ann Mooney is president of St. Mary's College in South Bend, IN.

Dr. Mary Jo Moran is executive director of the National Association of Church Personnel Administrators (NACPA).

Mr. R. Michael Murray, Jr. is a member of the advisory committee for McKinsey & Company, Inc.

Mr. Michael Naughton is director of the John A. Ryan Institute for Catholic Social Thought at the University of St. Thomas.

Ms. Joan Neal vice president of institutional planning and effectiveness at Cabrini College.

Rev. Robert Niehoff, SJ is president of John Carroll University.

Judge John T. Noonan is a judge in the U.S. Court of Appeals for the Ninth Circuit.

Mr. Michael Novak is a fellow at the American Enterprise Institute for Public Policy Research.

Ms. Margaret O'Brien Steinfels is co-director of the Fordham Center on Religion and Culture at Fordham University.

Ms. Jane Burke O'Connell is president of the Altman Foundation, New York, NY.

Dr. Ralph A. O'Connell, MD is provost of New York Medical College and the dean of the School of Medicine.

Mr. Jeremiah W. O'Connor is chairman and senior partner at O'Connor Capital Partners.

Mr. John J. O'Connor is CEO of JH Whitney Investment Management, LLC.

Mr. Jeremiah O'Grady is managing partner at Coda Capital Management.

Mr. Jonathan O'Herron is a partner at Lazard Freres.

Dr. John J. Petillo is president of Sacred Heart University.

Ms. Jane C. Pfeiffer is chairwoman of RCA Videodisc.

Mr. Roger Playwin is national executive director of the Society of St. Vincent de Paul.

Mr. Ronald F. Poe is president of RFP.

Mr. R. Robert Popeo, Esq. is chairman of Mintz, Levin, Cohn, Ferris, Glovsky & Popeo, PC.

Mr. James Post is past president and co-founder of Voice of the Faithful.

Mr. Paul Reilly is president of Raymond James and a member of the Board of the National Leadership Roundtable on Church Management.

Sr. Terry Rickard, OP is director of RENEW International.

Ms. Kerry A. Robinson is executive director of the National Leadership Roundtable on Church Management.

Mr. Gerard R. Roche is senior chairman of Heidrick & Struggles.

Ms. Cynthia Rowland is a partner at Coblenz, Patch, Duffy & Bass.

Mr. Joseph Roxe is chairman of Bay Holdings, LLC.

Mr. Frederic V. Salerno is former vice chairman of Verizon.

Rev. Bradley Schaeffer, SJ is president of the Weston Jesuit Community.

Br. Robert Schieler, FSC is provincial of the De La Salle Christian Brothers.

Sr. Katarina Schuth, OSF holds the endowed chair for the Social Scientific Study of Religion at St. Paul Seminary.

Mr. John Sexton is president of New York University.

Msgr. Robert T. Sheeran is former president of Seton Hall University.

Ms. Marianne D. Short, Esq. is a partner with Dorsey and Whitney, LLP.

Rev. John Sivalon, MM is former superior general of Maryknoll Fathers and Brothers.

Ms. Ann G. Skeet is executive director of the American Leadership Forum – Silicon Valley.

Rev. Thomas H. Smolich, SJ is president of the Jesuit Conference.

Rev. Larry Snyder is president of Catholic Charities USA.

Mr. Anthony Spence is editor-in-chief of Catholic News Services.

Rev. Msgr. John J. Strykowski, STD is Rector of the Cathedral-Basilica of St. James in the Diocese of Brooklyn.

Br. Stephen Synan, FMS is former president of the Religious Brothers Conference.

Dr. Richard F. Syron is a member of the Board of the National Leadership Roundtable on Church Management.

Mr. Dominic Tarantino is retired chairman of PriceWaterhouseCoopers, LLP.

Dr. Anthony Tersigni is president and CEO of Ascension Health.

Mr. Thomas Tierney is chairman and founder of the Bridgespan Group.

Sr. Kathleen Turley, RSM is former chancellor of the Diocese of Albany.

Rev. Richard Vega is president of the National Federation of Priests' Councils.

Mr. Edmond D. Villani is vice chairman of Deutsche Management.

Mr. Fay Vincent is former commissioner of Major League Baseball.

Rev. Jeffrey P. von Arx, SJ is president of Fairfield University.

Rev. John J. Wall is president of the Catholic Church Extension Society.

Admiral James Watkins is a retired officer of the U.S. Navy.

Mr. Don C. Watters is a former director of McKinsey & Company.

Mr. John A. Werwaiss is CEO of Werwaiss & Co., Inc.

Mr. Paul Wilkes is a writer and editor.

Ms. Charmaine Williams is a consultant to the Diocese of Fort Worth.

Ms. Carolyn Woo is dean of the Notre Dame Business School.

Dr. Richard Yanikoski is former president of the Association of Catholic Colleges and Universities.

Paul A. Zambernardi is executive vice-president of the Raskob Foundation for Catholic Activities.

Dr. Charles E. Zech is director of the Center for the Study of Church Management at Villanova University.

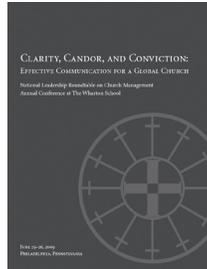
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Visit www.TheLeadershipRoundtable.org/Publications to download copies of previous publications.



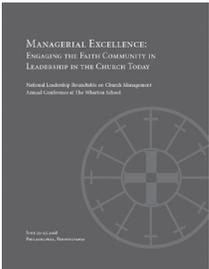
A Blueprint for Responsibility: Responding to Crises with Collaborative Solutions

Topics include the case for transparency and accountability in a global church, the lessons learned from the sex abuse crisis in the US, and philanthropy and accountability in uncertain economic times. (2010)



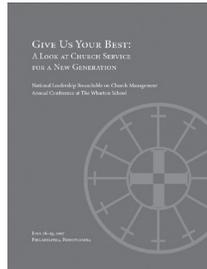
Clarity, Candor and Conviction: Effective Communications for a Global Church.

Topics include the future of communications, the growing Catholic Latino population in the U.S., and transcripts of keynote addresses from Prime Minister Tony Blair and Bishop Gerald Kicanas. (2009)



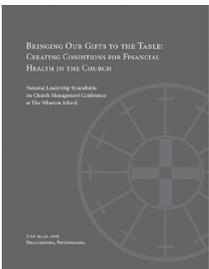
Managerial Excellence: Engaging the Faith Community in Leadership in the Church Today.

Topics include a parish ministry assessment tool, best practices from model parishes, and challenges and solutions in Church strategic planning. (2008)



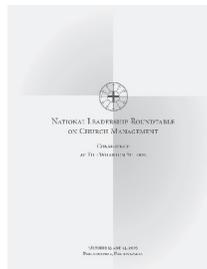
Give Us Your Best: A Look at Church Service for a New Generation.

Topics include identifying the next generation of Church leaders and ministers, and recruiting the very best for Church service. (2007)



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

Topics include effective diocesan planning and the power of economies of scale in the Church. (2006)



The Church in America: Leadership Roundtable 2005 - A Call to Excellence in the Church (2005)

LEADERSHIP ROUNDTABLE RESOURCES

STANDARDS FOR EXCELLENCE:

Stewardship and accountability for Catholic parishes, dioceses, and nonprofits



Catholic **Standards**
for **Excellence**[®]
A LEADERSHIP ROUNDTABLE INITIATIVE



The Standards for Excellence have helped us as a diocese, and parishes within the diocese, focus on the mission of Jesus. [The Standards for Excellence] have already proven themselves a valuable tool that provides benchmarks for accountability and transparency, particularly in the areas of management, human resources, and finances.”

—Most Reverend Dale J. Melczek,
Bishop of Gary

WHAT:

The Standards for Excellence code is a set of 55 best practices that offer parishes, dioceses, and Catholic nonprofits concrete steps to ensure that they are operating at the highest levels of stewardship and accountability in their finance, management, and human resource development.

WHY:

Independent research demonstrates that well-managed resources translate to better use of money, time, and talent for the mission of the Church. In adopting the Standards for Excellence code, over 350 dioceses, parishes and other Catholic nonprofits have found that they are able to more effectively and dynamically manage those ministries and programs that promote the pastoral mission of the Church. Additionally, embracing the Standards encourages the long-range stability of the parish, diocese, or Catholic nonprofit during times of leadership transition and economic hardship.

HOW:

The Standards for Excellence are rooted in 8 guiding principles that delineate how Catholic entities should operate to ensure the highest integrity and stewardship in ministry programs, advisory bodies, personnel and financial management, and fundraising. Fifty-five distinct performance-based standards are provided that serve as a roadmap to actualize the Standards for Excellence in the daily management of the temporal affairs of the Church.

The National Leadership Roundtable on Church Management offers free education resources, templates and sample policies to those dioceses, parishes or other nonprofit organizations that decide to implement the Standards for Excellence. Training and consultative assistance are also provided.



DIG DEEPER: go to CatholicStandardsForExcellence.org

TOOLBOX FOR PASTORAL MANAGEMENT

The management tools pastors need for the parishes parishioners deserve



“

Decisions having to do with finance and personnel...are necessary for us to have the kind of community that is nurturing to all the members and a place where Christ is proclaimed.

”

—Fr. Liam O'Doherty,
participant in
The Pastor's Toolbox 2010

WHAT:

With Seton Hall University, the National Leadership Roundtable on Church Management developed the Toolbox for Pastoral Management. This innovative program provides priests the necessary skills for the effective management of the parish, including working with finance councils, effective stewardship practices, and a theology of pastoral management.

HOW:

The program, a series of interactive seminars, is modeled upon the executive leadership programs conducted at the finest business programs in American higher education. Presentations are delivered over the course of one week and program participants are afforded the opportunity to share their experiences to develop successful approaches to commonly encountered management difficulties in the parish.

WHY:

The Toolbox for Pastoral Management was developed with the understanding that priests are often thrust into leadership positions within the Church without the requisite skills. As the early years of parish leadership are often considered the most critical and difficult in the life of a new pastor, The Toolbox for Pastoral Management ensures that priests are well equipped to effectively manage their temporal responsibilities.



IN THEIR OWN WORDS: Participant Testimonials at

TheLeadershipRoundtable.org/Toolbox

ESTEEM: The Church's Future. Now.



“

ESTEEM was an incredible journey for us throughout the school year. It's provided a meeting place for us to reflect on our faith, and that's allowed us to better understand where we want to go in the future and how we want the Catholic community to be part of our lives.

”

—Kelly Leather,
Sacred Heart University,
Fairfield, CT

WHAT:

ESTEEM (Engaging Students to Enliven the Ecclesial Mission) provides college students with the skills that will enable them to provide effective leadership to their faith communities following graduation. Developed through a programmatic affiliation between the National Leadership Roundtable on Church Management and the Saint Thomas More Center Chapel and Center at Yale University, the program informs participants how to apply their skills in the leadership of their faith communities.

HOW:

Working with local program facilitators, college and university students study the fundamentals of Church teaching within a well structured, year-long curriculum. Program components include Catholic social teaching, stewardship, liturgy, and the complexities of leadership in the contemporary Church.

WHY:

Studies conducted by the PEW Forum and other think-tanks clearly document the increasing disengagement associated with younger people and their faith communities. Anecdotal and statistical evidence shows that when young adults graduate and leave their vibrant campus ministry centers, they often fail to thrive in the parishes where they live; their skills and talents are not utilized for the good of the Church. ESTEEM provides those dynamic leadership skills as well as critical support structures that ensure that the work and mission of the contemporary Catholic Church will remain a priority for college students.



DIG DEEPER: go to EsteemLeadership.org



IN THEIR OWN WORDS: Participant Testimonials at
TheLeadershipRoundtable.org/ESTEEM

CATHOLIC LEADERSHIP 360

Leadership development for priests and lay leaders



“

We are making [Catholic Leadership 360] available to you to assist your process of setting continuing formation goals that will help you to be a priest after the mind and heart of Christ.

”

—Cardinal Sean O'Malley,
Archdiocese of Boston,
letter to priests, 2011

“

The 360 allowed me to reflect on my own abilities in comparison to others' perceptions and plan for my own development.

”

—Lay Leader,
Diocese of Pittsburgh, PA

WHAT:

Catholic Leadership 360 is a performance development program providing priests and lay leaders a unique opportunity to gain insight into their effectiveness as leaders in the Church. Through 360-degree feedback, a one-on-one feedback session, and an individual performance development plan, leaders are called to grow in their ministries and strengthen their leadership skills to reflect the life and mission of Jesus.

HOW:

Two customized and comprehensive assessment tools, developed by the National Leadership Roundtable on Church Management, The National Federation of Priests' Council, and the National Association of Church Personnel Administrators, provide a systematic assessment vehicle for both ordained and lay leaders to assess their pastoral leadership within their faith communities. The assessment tools are informed by the Basic Plan for the Ongoing Formation of Priests and the National Certification Standards for Lay Ecclesial Ministers.

WHY:

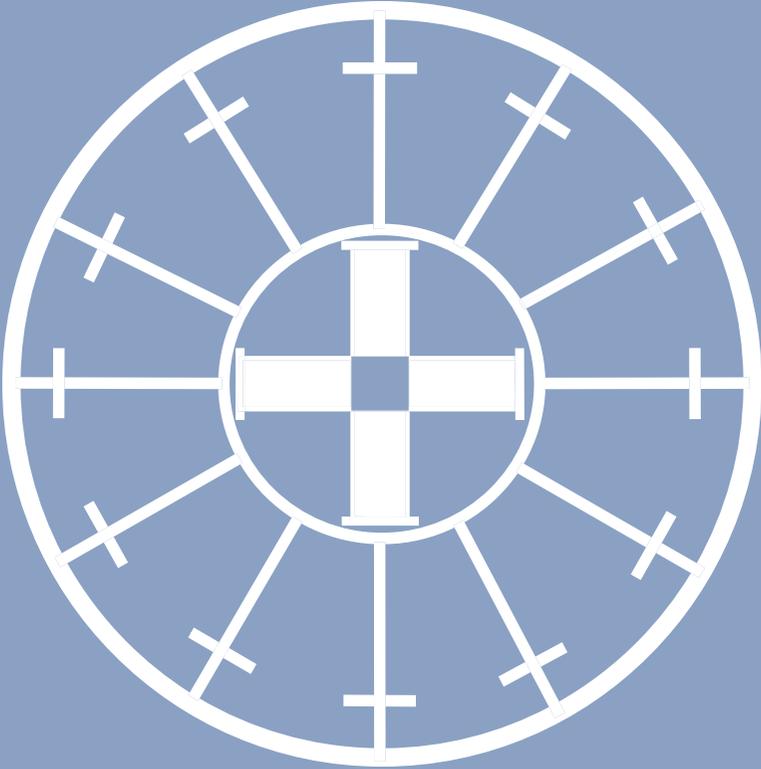
Pastoral leaders often minister within a diverse community, and receiving feedback from a range of colleagues and those receiving pastoral care provides valuable insights. Program participants realize significant benefits, including a clear understanding of personal leadership strengths and weaknesses, motivation and strategies on how to improve performance, and an increased understanding of those internal and external resources that may be applied to enhance working relationships and be a more effective pastoral leader.

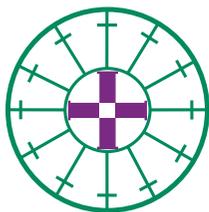


DIG DEEPER: go to TheLeadershipRoundtable.org/CL360

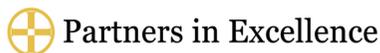
The National Leadership Roundtable on Church Management
FROM ASPIRATIONS TO ACTION:
Solutions for America's Catholic Schools
2011 Annual Meeting
Georgetown University
June 22-23, 2011

Sponsored by Faith Direct and Changing Our World, Inc.
www.TheLeadershipRoundtable.org/AnnualMeeting





NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT



1350 CONNECTICUT AVENUE NW SUITE 825 WASHINGTON, DC 20036-1741

TELEPHONE: 202/223-8962 | EMAIL: INFO@NLRCM.ORG | WEBSITE: WWW.THELEADERSHIPROUNDTABLE.ORG