



LEADERSHIP ROUNDTABLE

Service. Excellence. Church Management.

Heal the Body of Christ:

A plan to create
a new culture of leadership
and a new response to abuse
in the Catholic Church

A report from the Catholic Partnership Summit



OUR MISSION

Leadership Roundtable promotes best practices and accountability in the management, finances, communications, and human resources development of the Catholic Church in the U.S., including greater incorporation of the expertise of the laity.



Table of Contents

Introduction

page 3

Guiding Principles, Desired Outcomes, Key Concepts
to Respond to the Twin Crises of Abuse and Leadership Failures

page 4

Identifying the Root Causes of the Twin Crises and the Culture Change
Needed to Address Them

page 5

Creating a New Culture of Leadership

page 9

Creating a New Culture of Responding to Sexual Abuse

page 19

Task Forces: An Architecture for Recovery and Reform

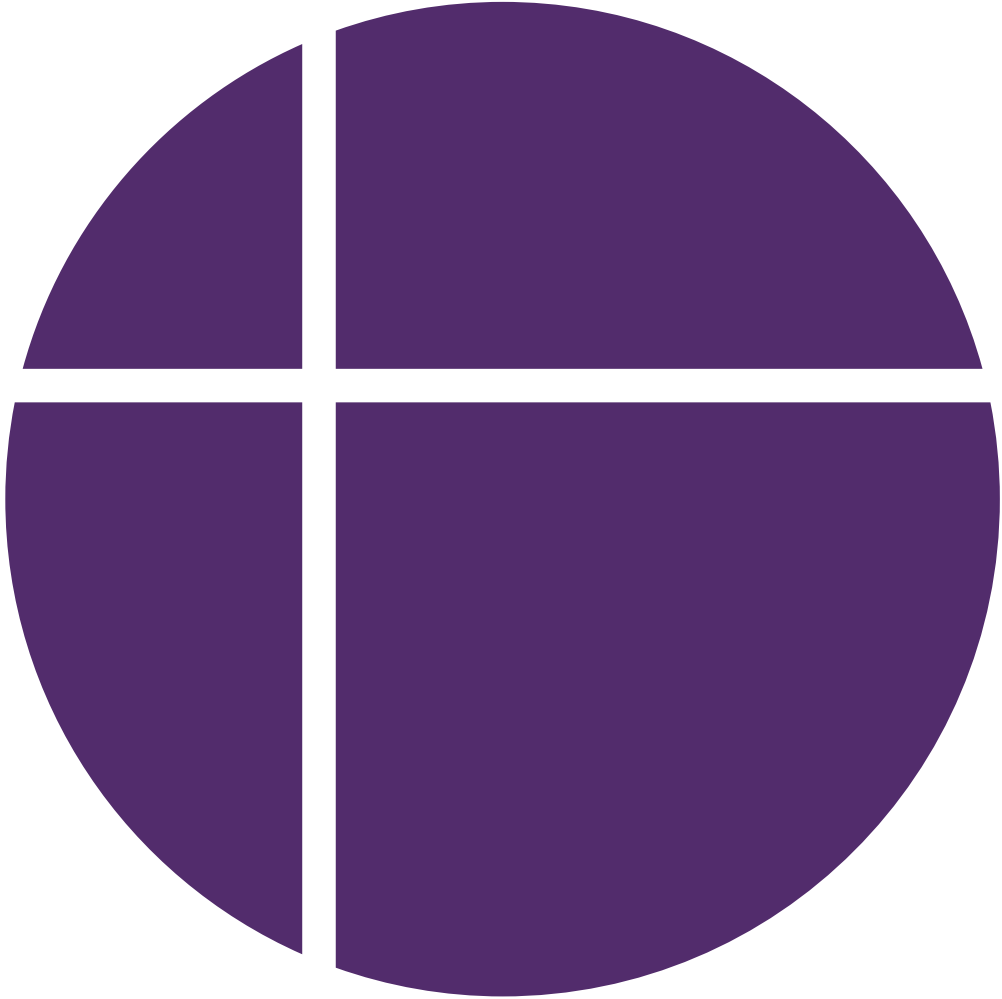
page 29

Leadership Roundtable's Next Steps

page 32

List of Expert Contributors

page 36



Dear Friend,

The body of Christ has been gravely wounded. Catholics throughout the United States, and across the globe, have felt the impact of twin crises: the crisis of sexual abuse and the crisis of leadership failures that covered up the abuse.

Sexual abuse survivors have been the ones most deeply affected. Additionally, as scripture reminds us, “if one member suffers, all suffer together with it” (1 Corinthians 12:26). Friends and families, parishioners, and ministers have also felt the impact. Therefore, as lay, religious, and ordained Catholics, each of us needs to be part of the solution towards recovery and reform.

United, we must address the root causes, as well as promote a new culture of leadership and a new response to abuse. The underlying conditions creating these crises were decades in the making; solving these problems will require a long-term, culture change that must begin with immediate steps, putting survivors first.

Since the crises broke in the summer of 2018, more than 50 dioceses have reached out to Leadership Roundtable for help. In February 2019, we convened the Catholic Partnership Summit with more than 200 Catholic leaders. The attendees hailed from 43 dioceses and included bishops and abuse survivors, diocesan staff and college presidents, corporate leaders and theologians, canon lawyers and philanthropists, religious superiors and experts in abuse prevention.

The Summit identified best practices in bishop accountability and co-responsibility, as well as best

practices for responding to sexual abuse. The top recommendations from these discussions were sent to U.S. representatives attending the Vatican meeting on abuse and are published in this report. The recommendations are grouped into accountability, co-responsibility, and transparency, to align with the three areas addressed during the Vatican meeting. Specific recommendations are identified for the USCCB leadership, bishops, and lay leaders.

We call upon Catholic leaders and the wider Catholic community in the United States to give serious reflection to these recommendations, to share them broadly, and to commit to implementing them locally and nationally.

Leadership Roundtable seeks to provide a path towards recovery and reform for the Catholic Church in the United States. We trust that God is with our Church as we commit to healing for abuse survivors and to a transformation of the leadership culture so that the people of God may flourish again.



Kim Smolik, Ed.D.
Chief Executive Officer



Guiding Principles, Desired Outcomes, Key Concepts to Respond to the Twin Crises of Abuse and Leadership Failures

In speaking with bishops and experts, Leadership Roundtable developed these guiding principles to help shape recommendations to address the twin crises at a diocesan or national level.

Guiding Principles

- impact the Catholic Church based on five principles: transparency, accountability, competency, justice, and trust,
- impact the leadership and management culture of the Church, in line with Catholic beliefs, ecclesiology, and canon law,
- restore trust in the Church based on measurable, visible outcomes,
- engage both ordained and lay Catholics, working together for the mission,
- lean forward, not dwell in the past;
- be realistic and able to be translated into practical strategy, organization, and implementation.

Desired Outcomes

1. Model the clergy-lay collaboration and co-responsibility that is the future of our Church
2. Develop actionable recommendations for USCCB leadership
3. Develop actionable recommendations for bishops and disseminate as best practices throughout the country
4. Begin to focus on root causes of the crisis

Key Concepts

The following concepts capture the heart of the dialogue at the Catholic Partnership Summit. There was a recognition that:

- there are twin crises that need twin solutions
- silence is no longer an option; there is an urgent need for bishops to act now,
- at the heart of all abuse, is an abuse of power,
- we should not conflate authority and power,
- there has been a failure to call clergy to accountability,
- everyone needs to be at the table, a diverse range of clergy and laity, including bishops and religious, mothers and fathers,
- any reforms need to address both the heart and mind: there is a need for moral integrity and spiritual conversion, as well as procedural and structural change,
- synodality is a necessary characteristic of the response;
- the results of reform will not only address the abuse and leadership failures, but will help the mission of the Church to thrive.

Identifying the Root Causes of the Twin Crises and the Culture Change Needed to Address Them

This section contains a summary of the expert input and discussion during the Catholic Partnership Summit concerning the root causes of the twin crises. It concludes with a list of root causes and recommendations for deepening the understanding of them.

Horrible as the sexual abuse and leadership crises confronting the Catholic Church in the United States has been, there is an abiding hope that from its ashes can emerge a bold new culture of leadership and management that combines the abundant strengths of clergy and laity to ensure transparency, accountability, and co-responsibility. The new culture should not only provide safety for all ages, but also renew the Church and restore trust.

To be successful, this rebuilding first requires a meticulous assessment of the root causes of

the twin crises: the crisis of sexual abuse and the crisis of leadership failures that covered up that abuse. Leadership Roundtable's Catholic Partnership Summit, held February 1 and 2 in Washington, D.C., was an important step on the road to identifying the foundational and systemic causes of the crises along with meaningful and sustainable ways to address them. "This is a watershed moment in which we have to look at how we exercise leadership in the life of the Church and authority in the life of the Church," said Cardinal Blase Cupich, Archbishop of Chicago,

before an audience of more than 200 Catholic leaders.

Kim Daniels, Associate Director of the Initiative on Catholic Social Thought and Public Life at Georgetown University, spoke to the urgent need to take action. She talked about a recent gathering with young Catholics in which she was reminded that "it's on us...to help carry forward the deposit of faith for them."

Identifying the Root Causes

The Catholic Church has historically operated with an

“

Silence is not an option for any of us.

—JOHN CARR

”



This is a watershed moment in which we have to look at how we exercise leadership in the life of the Church and authority in the life of the Church.

–CARDINAL BLASE CUPICH



insular form of governance. Within the diocesan structure, decisions are made by bishops with little input from others beyond the chancery. Synodality and communication among bishops and with others are at best limited. “It’s a toxic condition because bishops can become individually isolated—and isolated first and foremost from each other,” acknowledged Cardinal Joseph Tobin, Archbishop of Newark. “And when that happens, it’s difficult to call each other to accountability.” What’s more, there are not structures in place to ensure Church leader hear with candor the needs or expertise of the laity, let alone the anguish and righteous anger of those who have been sexually abused, their families, and communities.

Cardinal Tobin went on to speak about the need for all the baptized to be part of the solution to the crises. “We’re certainly looking to other people to help us.”

Without being in touch and hearing from others, a pernicious culture of clericalism results in a mentality and actions in which clergy see themselves as separate from other Catholics and put themselves or the institution ahead of the wellbeing of the faithful. Clericalism is seen by many as pervasive in the Church today and Pope Francis has asked Catholics to purge it in all its forms. In an article by Bishop Shawn McKnight of the Diocese of Jefferson City, MO clericalism occurs when a member of the clergy – be it bishop, priest, or deacon –

uses his position in the Church for personal gain. Among its forms are a pastor who makes an important decision for the parish without proper consultation, or a bishop who opts not to be transparent about a matter involving sexual abuse in the Church and attempts to minimize its traumatic effects on victims.

Indeed, the twin crises has demonstrated to many that silence is no longer an option, and that the strategy most urgently needed today is transparency, to tell the truth freely and openly. That point was driven home poignantly by John Carr, founder and director of the Initiative on Catholic Social Thought and Public Life at Georgetown University.



Kim Daniels



Cardinal Blase Cupich, Cardinal Joseph Tobin, Cardinal Seán Patrick O'Malley



John Carr, Kerry Robinson, Kim Smolik

A one-time seminarian and survivor of clergy abuse who has discussed the subject publicly and in intense dialogues with students, Carr noted, “Silence is not an option for any of us. While it may be true that children are more safe in the Catholic community because of the protections that have been put in place...it is also true that the episcopal culture, the secrecy that allowed, abetted, aided, enabled (the abuse crisis) is still in place in too many ways.”

Transforming the Culture

Many of the clergy and laity at the Summit believed that clericalism and a lack of transparency, accountability, and co-responsible governance are among the root causes of the Church’s current plight. Many felt, therefore, that a new culture that addresses these root causes and provides more transparency, accountability and

co-responsibility are the necessary pathways forward. Not only are new structures needed to move bishops beyond their isolation and unilateral decision-making, but to improve the relationship and communications between bishops, priests, and laity.

Cardinal Cupich explained Pope Francis’ vision for this foundational change: inverting the current organizational pyramid that keeps a bishop isolated at the top. Instead, the exercise of authority should be about building a capacity for participation and involvement of Catholics from all walks of life who are willing to apply their gifts and skills to the benefit of the Church. The Holy Father has pointed to the concept of “synodality” as a way to transform the culture. Cardinal Cupich elaborated that leaders should “not see ourselves as serving by governing, but governing by serving, and allowing people’s gifts

to come to the surface. I think it’s really important for us to move in that direction and to realize... there are experiences that ordinary people have in their daily lives that can help us. So we shouldn’t be writing documents on healthcare, war and peace, racism, and human sexuality without having broad conversations with people about their own experiences, because we don’t have those experiences.”

There is no underestimating the role and expertise of the laity, as well as the importance of transparency, accountability, and co-responsibility to a new culture of servant leadership and management for the Church. Cardinal Seán O’Malley perhaps said it best for Summit attendees by describing the challenge he faced on being named Archbishop of Boston in 2003, at a time of economic troubles triggered by the sexual abuse crisis within the archdiocese. “It was only because of the lay advisory groups that came together that we have been able to recover from that,” he declared. “And one of the things that we embraced coming out of this was transparency.” It is due to clergy and laity working together, that they have begun to make significant strides towards recovery and reform.

Root Causes of Twin Crises

The following root causes need to be addressed in order to effect culture change in the Church

1. Lack of Bishop Accountability
2. Lack of Co-Responsible Governance Structures and Need for Synodality
3. Lack of Transparency
4. Clericalism

Next steps to deepen the understanding of root causes

As additional root causes become apparent, they should be studied further and a clear action plan developed.

1. Conduct objective, systematic study of root causes of the crises to ensure the Church is addressing foundational issues and not just their symptoms; leverage the expertise of academic institutions and theologians
2. Define clericalism, its root causes, and the various forms it takes
3. Consider how seminary culture and curriculum contribute to a culture of clericalism
4. Commission research and update the John Jay study to reflect the most recent data
5. Do a gap analysis to identify current culture and utilize a culture transformation model to help articulate and implement the desired culture

Creating a New Culture of Leadership

This section contains a summary of the expert input and discussion during the Catholic Partnership Summit about how to reform the leadership culture that covered up the abuse, as well as the actions necessary to produce a new culture of servant leadership and management. It concludes with recommendations from the Summit for improving accountability, co-responsibility, and transparency within the new culture.

From the discussions among Catholic Church leaders at the second session of Leadership Roundtable’s Catholic Partnership Summit, this sobering theme arose: the problems facing the Church are about more than sexual abuse. The Church is also facing the blatant abuse of power at the leadership level that has damaged the Church’s

once-redoubtable religious, moral, and intellectual authority.

That recognition was part of an intense examination of bishop accountability, clergy-laity co-responsibility, and the role lay and ordained leaders may play in moving the Church from a shameful recent past to a hopeful future. As

more than one speaker pointed out, organizations that have accountable leaders have trusted leaders – and that’s a highly desirable place for the Church to move toward.

For Fr. Bryan Hehir, Secretary for Health and Social Services in the Archdiocese of Boston, responsibility provides the moral



Bishop Shawn McKnight, Barbara Anne Cusack



This has to be a complete response by the Church, not just part, but all of us have to be engaged and proactive.

—BISHOP SHAWN MCKNIGHT



foundation for accountability, and “accountability is the public face of those who take responsibility,” he noted. In practice, responsibility encompasses ownership for the tasks we are charged with doing. Accountability is taking responsibility for one’s actions and performance.

What does the lack of accountability and co-responsibility look like within the Church? Chancellor Barbara Anne Cusack of the Archdiocese of Milwaukee noted that if there are only mitres and collars sitting around the table making decisions, then there are no mothers, fathers, or other lay people.

“It’s clear that the Catholic Church has no real system of accountability because there are no sanctions for a priest once he’s ordained, except if he abuses money, children, or power in an extreme way,” commented Fr. Hans Zollner, President of the Centre for Child Protection of the Pontifical Gregorian University in Rome. He went on to define accountability as the collective

sharing and use of power, including the laity. “The question is how is [power] applied...how do we apply the checks and balances that are best practices in the corporate world, how can they be applied also to how we live as a Church and how we function as a Church,” he explained.

The Need for New Structures in Bishop Accountability

The Summit also addressed the question of how the Catholic Church could build a system of accountability and co-responsibility that could provide checks and balances for the everyday actions of bishops and other Church leaders.

“I suggest it’s multiple layers of codes of conduct, a procedure for how a complaint would get heard, an allegation would get investigated, and then a process for determining what kind of consequence would follow,” offered Brian Reynolds, Chancellor and Chief Administrative Officer for the Archdiocese of Louisville, who has

worked to resolve more than 200 known cases of sexual abuse of children.

At its Fall General Assembly in November 2018, the United States Conference of Catholic Bishops (USCCB) called for the development of new protocols in response to the sexual abuse and leadership crises. These included a code of conduct for bishops and an independent commission to address allegations of abuse against bishops.

Reforms for Leadership Culture Change

Bishop Shawn McKnight of the Diocese of Jefferson City spoke about how he felt the need for “sober, yet immediate action” as he listened to the people of his diocese in the wake of the recent crises. He created a protocol should there be an allegation against a sitting bishop of his diocese. He also required the religious communities serving in his diocese to commit to releasing the names of those credibly accused in their communities in order to serve

within the diocese. “This has to be a complete response by the Church,” affirmed Bishop McKnight, “not just part, but all of us have to be engaged and proactive.”

The role of canon law, as a scaffold for strengthening accountability and co-responsibility, came under scrutiny at the two-day Summit. The consensus was that the Code of Canon Law needs significant updating to turn it into an effective platform for leadership accountability. Barbara Anne Cusack, Chancellor of the Archdiocese of Milwaukee and a canon lawyer, believes that any changes in canon law must follow fundamental changes in Church

culture. “We need more concrete and clear uses of penal law,” she contended, “and bishops have to hold one another accountable.”

Clearly, accountability and co-responsibility cannot hope to thrive within the Church in the absence of transparency or good communication, multiple speakers asserted. With regards to what effective communication looks like in the Church, it is often “inadequate, it’s poor, or actually it’s nonexistent,” said Reynolds. He shared that the Church needs “more specific efforts at training those responsible for communication, as well as the leadership...and a greater requirement that communication

take place.” He added that leaders also need to put a priority on talking with those who are survivors and those who are abusers. “We need to understand that the abusers and the survivors are human beings, real live people, we can’t just talk about them as some third parties.”

Despite the recognition that some proposals will take time to change, there was a widespread belief that some reforms could – and should – be instituted without delay.



Creating a New Culture of Leadership For USCCB Leadership

Accountability

There has been a failure to call bishops to accountability. There is a need for leadership development and support.

1. Identify the twin crises as the main priority for Church funding and resourcing for the immediate future
 - 1.1 Commit to a preferential option for abuse victims and families, make it a priority to meet with survivors; keep survivors, families, and affected parishioners at all levels of decision-making
 - 1.2 Publicly and collectively acknowledge the leadership failure and cover-up
2. Create structures to ensure a new culture of accountability
 - 2.1 Implement a Code of Conduct for bishops and ensure the Charter for the Protection of Children and Young People includes bishops; consider a national working group of clergy and lay experts to help write these
 - 2.2 Create ministerial codes of conduct that recognize abuse of power not only against children, but also adults
 - 2.3 Commit to a framework for action with appropriate structures to address the multi-layered crisis; provide consultative groups the authority they need to do their work effectively
 - 2.4 Commit to and invest in creating a new culture of leadership and management that is transparent, accountable, and proactive in including lay leadership and co-responsibility
 - 2.5 Seek authority for the bishops conference to modify canon law to address local realities and update canon law to include a detailed list of punishments for clearly defined crimes of abuse or cover-up by clergy, religious, or laity
 - 2.6 Implement ongoing professional and personal formation, as well as 360-degree assessments for bishops and all Catholic leaders that begin in seminaries and ministerial programs; assessments should be linked to appointments
 - 2.7 Require best practices in human resources: effective selection, training, assignment, evaluation, compensation, and continuing education
 - 2.8 Provide vocation directors with better training and develop national standards relating to clergy selection and abuse prevention
 - 2.9 Make the bishop selection process more transparent, utilizing a genuine discernment process that includes laity and clergy and takes into consideration the potential bishop's experience in dealing with abuse
 - 2.10 Consult with other denominations to learn about their processes of bishop accountability and co-responsibility

3. Implement stronger formation programs for bishops and clergy
 - 3.1 Explore different models of training for new bishops
 - 3.2 Develop a mentoring system for bishops
 - 3.3 Revise the Plan for Priestly Formation and seminary curriculum to address the root causes of clericalism by equipping priests with skills in shared leadership, transparency, and accountability
 - 3.4 Rethink models of seminary formation to address disparities between institutions
 - 3.5 Revise the theology of priesthood and priestly identity to reflect servant leadership

Co-responsibility

Laity and clergy are co-responsible in leadership in the Church. Synodality is a necessary characteristic of the response.

1. Put in place mechanisms for greater synodality among bishops, among bishops and priests, among clergy and laity
2. Create a governance structure that is transparent with layered checks, balances, and oversight, and includes the expertise of the laity at the parish, diocesan, and national level
3. Ensure co-responsibility of lay and ordained in Church leadership and management through hiring appropriate and competent diverse lay personnel at all levels
4. Develop and invest in ongoing formation programs in management and leadership to train clergy, religious, and laity, including bishops
5. Involve women in initial and ongoing clergy formation

Transparency

Silence is no longer an option; there is an urgent need to act now and demonstrate transparent leadership.

1. Provide consistent, transparent, and coordinated communications at all levels
2. Invest in and train pastoral leaders in effective communications
3. Establish a crisis communications plan for the USCCB and develop a proactive plan for restoring trust

Creating a New Culture of Leadership For Bishops

Accountability

There has been a failure to call bishops to accountability. There is a need for leadership development and support.

1. Identify the twin crises as the main priority for Church funding and resourcing for the immediate future
 - 1.1 Commit to a preferential option for abuse victims and families, make it a priority to meet with survivors; keep survivors, families, and affected parishioners at all levels of decision-making
 - 1.2 Publicly acknowledge the leadership failure and cover-up
2. Implement accountability structures for bishops and all Church leaders
 - 2.1 Create ministerial codes of conduct that include the bishop and that recognize abuse of power not only against children, but also adults
 - 2.2 Commit to and invest in creating a new culture of leadership and management that is transparent, accountable, and proactive in including lay leadership and co-responsibility
 - 2.3 Require best practices in human resources: effective selection, training, assignment, evaluation, compensation, and continuing education
 - 2.4 Follow the example of bishops who have proactively set up their own accountability structures
 - 2.5 Implement ongoing professional and personal formation, as well as 360-degree assessments for bishops and all Catholic leaders that begin in seminaries and ministerial programs; assessments should be linked to appointments
 - 2.6 Develop a mentoring system for bishops
3. Explore new ways to ensure the bishop selection and succession process is accountable to the people
 - 3.1 Make the bishop selection process more transparent, utilizing a genuine discernment process that includes laity and clergy and takes into consideration the potential bishop's experience in dealing with abuse
 - 3.2 Implement a process of succession planning to manage bishop and senior diocesan leadership transitions

Co-responsibility

Laity and clergy are co-responsible in leadership in the Church. Synodality is a necessary characteristic of the response.

1. Do a gap analysis for identifying current culture and utilizing a culture transformation model to help articulate and implement the desired culture
2. Commit to a framework for action with appropriate structures to address the multi-layered crisis; provide consultative groups the authority they need to do their work effectively
 - 2.1 Commit to a diocesan governance structure that is transparent with layered checks, balances, and oversight, including a strong presbyteral council, corporate board, and diocesan pastoral and finance councils
 - 2.2 Ensure co-responsibility of lay and ordained in Church leadership and management through renewed structures and hiring appropriate and competent diverse lay personnel at the diocesan level
 - 2.3 Develop and invest in ongoing formation programs in management and leadership to train clergy, religious, and laity, including bishops
 - 2.4 Engage laity, including women, on personnel boards for clergy
 - 2.5 Put in place mechanisms for greater synodality among bishops, among bishops and priests, among clergy and laity
 - 2.6 Develop a human resource system that can support Church leaders who are experiencing challenges not connected to abuse
3. Implement diocesan systems to involve laity in leadership
 - 3.1 Involve women in initial and ongoing clergy formation
 - 3.2 Explore alternative forms of parish leadership, including lay parish life coordinators

Transparency

Silence is no longer an option; there is an urgent need to act now and demonstrate transparent leadership.

1. Provide consistent, transparent, and coordinated communications at all levels
 - 1.1 Invest in and train pastoral leaders in effective communications
 - 1.2 Establish a crisis communications plan and develop a proactive plan for restoring trust
 - 1.3 Identify best practices for bishops to listen to and engage parishioners that makes bishops accessible and responsive to needs
2. Build a broad, deep, and transparent financial management and accounting system

Creating a New Culture of Leadership For Lay Leaders

Accountability

Laity need to be involved in order to create a culture of accountability for all Church leaders.

1. Diocesan leaders, parish leaders, and other lay experts need to be involved in creating a culture of accountability.

- 1.1 Commit to a preferential option for abuse victims and families, make it a priority to meet with survivors; keep survivors, families, and affected parishioners at all levels of decision-making
- 1.2 Identify the twin crises as the main priority for Church funding and resourcing for the immediate future
- 1.3 Commit to and invest in creating a new culture of leadership and management that is transparent, accountable, and proactive in including lay leadership and co-responsibility
- 1.4 Make the bishop selection process more transparent, utilizing a genuine discernment process that includes laity and clergy and takes into consideration the potential bishop's experience in dealing with abuse
- 1.5 Implement a process of succession planning to manage bishop and senior diocesan leadership transitions
- 1.6 Implement ongoing professional and personal formation, as well as 360-degree assessments for all Catholic leaders; assessments should be linked to ongoing formation requirements and ministry appointments
- 1.7 Require best practices in human resources: effective selection, training, assignment, evaluation, compensation, and continuing education

2. Theologians, canon lawyers, and other Catholic academics need to be involved in creating a culture of accountability.

- 2.1 Revise the theology of priesthood and priestly identity to reflect servant Leadership
- 2.2 Seek authority for the bishops conference to modify canon law to address local realities and update canon law to include a detailed list of punishments for clearly defined crimes of abuse or cover-up by clergy, religious, or laity

3. Philanthropists need to be involved in creating a culture of accountability.

- 3.1 Help the culture shift by requiring Catholic organizations seeking funding to adhere to standards for excellence in management and leadership

Co-responsibility

Laity and clergy are co-responsible in leadership in the Church. Synodality is a necessary characteristic of the response.

1. Diocesan leaders, parish leaders, and other lay experts need to be involved in creating a culture of co-responsibility.

- 1.1 Put in place mechanisms for greater synodality among bishops and priests, among clergy and laity, including diocesan synods, diocesan pastoral councils, vicariate/deanery councils, etc.
- 1.2 Create or renew a governance structure that is transparent with layered checks, balances, and oversight, including a strong presbyteral council, pastoral council, corporate board, and finance council; integrating the expertise of the laity
- 1.3 Commit to and invest resources in creating a new culture of leadership and management in diocesan offices and parishes that is transparent, accountable, and grounded in best practices
- 1.4 Ensure co-responsibility of lay and ordained in Church leadership and management through hiring appropriate and competent diverse lay personnel at all levels
- 1.5 Develop a human resource system that can support Church leaders who are experiencing challenges not connected to abuse
- 1.6 Engage laity, including women, on personnel boards for clergy
- 1.7 Explore alternative forms of parish leadership, including lay parish life coordinators

2. Theologians, canon lawyers, and other Catholic academics need to be involved in creating a culture of co-responsibility.

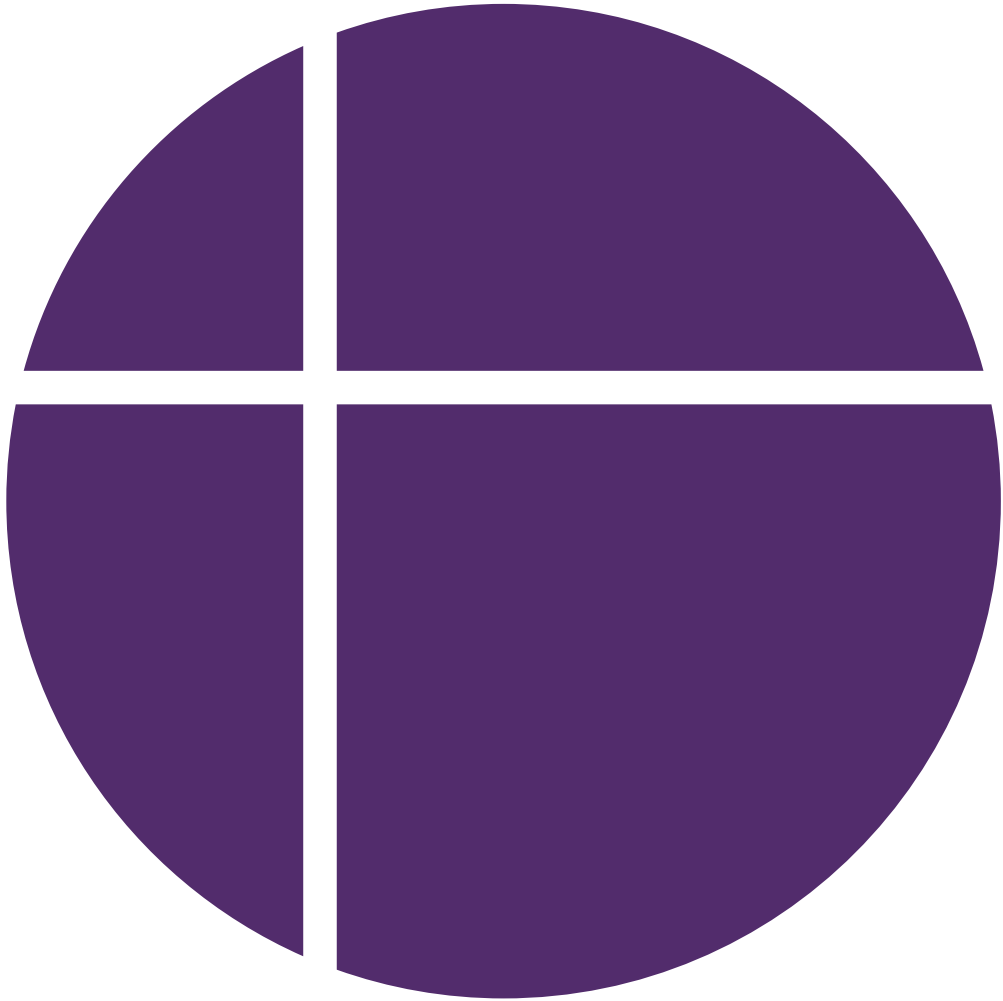
- 2.1 Involve women in initial and ongoing clergy formation
- 2.2 Develop and invest in ongoing formation programs in management and leadership to train clergy, religious, and laity

Transparency

Silence is no longer an option; there is an urgent need to act now and demonstrate transparent leadership.

1. Diocesan leaders, parish leaders, and other lay experts need to be involved in creating a culture of transparency.

- 1.1 Provide consistent, transparent, and coordinated communications at all levels
- 1.2 Invest in and train pastoral leaders in effective communications
- 1.3 Establish a crisis communications plan and develop a proactive plan for restoring trust
- 1.4 Build a broad, deep, and transparent financial management and accounting system



Creating a New Culture of Responding to Sexual Abuse

This section contains a summary of the expert input and discussion during the Catholic Partnership Summit about how to build a new culture for responding to sexual abuse. It concludes with recommendations from the Summit for improving accountability, co-responsibility, and transparency within the new culture.

The long journey to build a new culture for how Catholic leaders respond to sexual abuse is well underway in Catholic dioceses across the United States. Some of the evidence is seen in the growth of survivor outreach, zero-tolerance policies, diocesan review boards, and prevention training programs, many involving the leadership of the laity. But as participants repeatedly heard from Catholic leaders at the Catholic Partnership Summit, more needs to be done, especially concerning the culture that permitted and covered up the abuse.

Signs of Progress, and the Challenges Ahead

There are some signs that diocesan initiatives are gaining traction. The number of reported abuse cases has dropped significantly from about

600 annually during the peak (1965 to 1985) to about 20 cases a year since 2004, according to Kathleen McChesney, who was selected by the United States Conference of Catholic Bishops (USCCB) to establish and lead the national office for child and youth protection. “That is progress,” McChesney told Summit participants, but “there are still cases occurring since the Charter [for the Protection of Children and Young People] was enacted and there needs to be more research into why that is happening: Who are those individuals who did

not get it? Who are those people who were not trained? Where was the supervision and oversight? And were there red flags and behaviors that were not seen, or were ignored?”

There is indeed no shortage of challenges ahead for Church leaders determined to address the sexual abuse crisis. While the Charter for the Protection of Children and Young People (the “Dallas Charter”) is viewed as a foundation on which to build, revisions over the years have been modest and have not

“

...there are still cases occurring since the Charter was enacted and there needs to be more research into why that is happening.

—KATHLEEN MCCHESENEY

”



I would encourage bishops to implement best practices, to go beyond the Charter within your own dioceses. Do what you know needs to be done...Just begin now.

—FRANCESCO CESAREO



gone far enough, as evidenced by the publication of the Pennsylvania Grand Jury Report and credible allegations of abuse against former Cardinal Theodore McCarrick. In a special report in November 2018, the National Review Board, the independent lay advisory panel to the USCCB on the protection of children, said it was “unaware of any mechanism that has been utilized by the USCCB to hold culpable bishops accountable for their past action or inaction,” nor was it aware of “any sense of meaningful fraternal correction among U.S. bishops regarding matters of abuse.”

The Chair of the National Review Board, Francesco Cesareo, described for the Catholic Partnership Summit efforts by his group to improve the Charter by eliminating ambiguities and strengthening its compliance audit process. “One of the things we found as we’ve done root cause analysis of those dioceses where issues have emerged..is that all

of those dioceses were compliant – they all passed the audit,” he observed. “So the audit is really only as good as the Charter, and the Charter really lays a very low bar for compliance.” The Board is trying to promote a culture shift towards proactivity - not only ticking off the boxes for the audit. The Board has also requested that the bishops change the Charter to require regular audits of parishes, schools, and seminaries, a subject on which the Charter is currently silent.

How one Archdiocese is Leading with Best Practices

One archdiocese that has mounted a vigorous campaign to hold bishops and priests accountable by bringing in outside experts is Saint Paul and Minneapolis, which agreed last June to a \$210 million settlement to 450 victims of clergy sexual abuse as part of the archdiocese’s bankruptcy reorganization. The exhaustive reform effort that has taken place over many years – praised by the District Attorney and Plaintiff’s Attorney as turning Saint Paul and Minneapolis



Kathleen McChesney, Tim O'Malley, Susan Mulheron



Fr. Hans Zollner, Kerry Robinson, Kim Smolik



Susan Mulheron, Francesco Cesareo

into the safest archdiocese in the country – was detailed for Church leaders at the Catholic Partnership Summit. Spurred to action by a police investigation in 2013, the archdiocese brought in Kathleen McChesney to review their files and assist them in implementing new protocols. The archdiocese also created an independent task force. “We had safe environment protocols in place, we met the minimal requirements of the Charter, but [the task force] told us we needed to do more,” recalls Susan Mulheron, a canon lawyer who was named Chancellor for Canonical Affairs for the archdiocese in 2013.

Following the task force’s recommendations, the archdiocese reorganized its Ministerial Standards and Safe Environment program by hiring Tim O’Malley, previously Deputy Chief Judge

of the Minnesota Office of Administrative Hearings, as its director. Dispensing with business as usual, the archdiocese upgraded the audit and recordkeeping systems, enhanced education and information to ensure everyone was aware of reporting requirements around abuse and misconduct, and improved services for survivors. Additionally, as part of a Settlement Agreement, O’Malley began rigorously enforcing new guidelines for background checks, training, and a strict code of conduct for all employees, ordained and lay.

Difficult though the exercise has been, Mulheron held it up to Church leaders at the Summit as a valuable lesson on several fronts. She encouraged leaders to not wait to act until you’re forced to by outside authorities. She also encouraged them to engage the

services of outside experts and then set them up for success by making sure they have adequate funding and resources. In the case of bishops, she emphasized that engaging consultative structures and having the right people in various posts are part of canon law. “This is not an option...this is a fundamental requirement of the job,” she noted.

That point was reinforced by National Review Board head Cesareo, who noted that a number of bishops have already gone beyond the Dallas Charter on their own to create a culture of safety within their dioceses. “I would encourage bishops to implement best practices, to go beyond the Charter within your own dioceses. Do what you know needs to be done that you feel will make a difference,” he implored. “Just begin now.”

Creating a New Culture of Responding to Sexual Abuse **For USCCB Leadership**

Accountability

Bishops need to accept the leadership failures and cover-up that contributed to the twin crises.

1. Identify the twin crises as the main priority for Church funding and resourcing for the immediate future
 - 1.1 Commit to a preferential option for abuse victims and families, make it a priority to meet with survivors; keep survivors, families, and affected parishioners at all levels of decision-making
 - 1.2 Do research into the cases of abuse that continue to occur, post-Charter, and identify the procedure(s) that failed and/or which warning signs, or “red flags”, were not acted upon
 - 1.3 Acknowledge that the Church is wounded, recognize the post-traumatic stress that these issues have placed upon clergy and laity, and respond with pastoral care
2. Create structures to ensure a new culture of accountability
 - 2.1 Convene a national working group of clergy and lay experts to help write a Code of Conduct for bishops and ensure the Charter for the Protection of Children and Young People includes bishops
 - 2.2 Create ministerial codes of conduct that recognize abuse of power not only against children, but also adults
 - 2.3 Set national standards and protocols for: role and responsibility of diocesan review boards, standard definitions for the accused and other major terms, retention and record keeping, release of names of all credibly accused, what a comprehensive audit process entails, and periodic, independent review of files for allegations or red flags
 - 2.4 Seek authority for the bishops conference to modify canon law to address local realities and update canon law to include a detailed list of punishments for clearly defined crimes of abuse or cover-up by clergy, religious, or laity
 - 2.5 Consider a regional review board model that would allow multiple dioceses that lack certain experts to come together to ensure a wide cross-section of expertise and consistency of practice
 - 2.6 Ensure seminary curriculum addresses abuse prevention, improved human formation, personal integrity, and the experience of survivors
 - 2.7 Create policies addressing restrictions on bishops who were removed or resigned due to abuse, cover-up, or misconduct
 - 2.8 Implement national standards for location and supervision of abusers, both diocesan and religious
 - 2.9 Set up a third-party reporting system for abuse, harassment, or misconduct by any Church leader
3. Develop proactive detection mechanisms
 - 3.1 Provide vocation directors with better training for their role and develop national standards relating to clergy selection and abuse prevention
 - 3.2 Develop an early warning system that identifies struggling pastoral leaders to provide spiritual direction, fraternal correction, psychological counseling, ordered respite, and, if needed, discipline
 - 3.3 Reach out to communities that may not have a culture of reporting or who may under-report for various reasons and engage them

Co-responsibility

Laity and clergy are co-responsible in leadership in the Church. Synodality is a necessary characteristic of the response.

1. Create a governance structure that is transparent with layered checks, balances, and oversight, and includes the expertise of the laity at the parish, diocesan, and national level
2. Establish a national or metropolitan independent, lay-led entity that will address misconduct of bishops and bishop accountability and will include transparency during and after an investigation

Transparency

There is a need for a full accounting of the credibly accused with strengthened systems to prevent future abuse.

1. Create systems and structures that provide a transparent accounting of abuse and share the findings of all investigations or reviews
 - 1.1 Create a single site of essential resources, research, and standardized definitions related to the abuse crisis, as well as a way to share best practices and examples of successful implementation
 - 1.2 Develop a national registry of diocesan and religious clergy that lists priests in good standing, along with a contact for inquiry of others
 - 1.3 Form proactive agreements to cooperate with external, civil authorities on investigations, reports, and statutes of limitations
 - 1.4 Coordinate a national release of names to prevent ongoing trauma that happens each time more names are released
 - 1.5 Commit to and convene truth and reconciliation commissions concerning sexual abuse and cover-up, locally or nationally
 - 1.6 Complete the various investigations into the situation surrounding former Cardinal McCarrick and publicize their results
 - 1.7 Ensure all Church leaders have a fundamental understanding of the twin crises and the data, such as the John Jay reports
 - 1.8 Commission longitudinal research to gather data and disseminate best practices for responding to sexual abuse
 - 1.9 Provide full financial transparency regarding all aspects of the crisis, include how donations are used
2. Provide consistent, transparent, and coordinated communications at all levels
 - 2.1 Publicly and collectively acknowledge the leadership failure and cover-up
 - 2.2 Strengthen the audit process for the Charter for the Protection of Children and Young People so that it includes a review of dioceses, parishes, Catholic schools, and religious orders; is not self-reporting; is modeled off accreditation processes for higher education; does unannounced spot checks; creates consequences for non-compliance; and makes resources available for dioceses with financial need
 - 2.3 Use data to show the visible, measurable change since the implementation of the Charter to help restore trust, especially with the young and disaffiliated
 - 2.4 Establish a crisis communications plan and develop a proactive plan for restoring trust

Creating a New Culture of Responding to Sexual Abuse **For Bishops**

Accountability

Bishops need to accept the leadership failures and cover-up that contributed to the twin crises.

1. Publicly acknowledge the leadership failures, accept responsibility, engage with survivors, and begin to restore trust
 - 1.1 Commit to a preferential option for abuse victims and families, make it a priority to meet with survivors; keep survivors, families, and affected parishioners at all levels of decision-making
 - 1.2 Identify the twin crises as the main priority for Church funding and resourcing for the immediate future
 - 1.3 Reach out to communities that may not have a culture of reporting or who may under-report for various reasons and engage them
 - 1.4 Acknowledge that the Church is wounded, recognize the post-traumatic stress that these issues have placed upon clergy and laity, and respond with pastoral care
 - 1.5 Do research into the cases of abuse that continue to occur, post-Charter, and identify the procedure(s) that failed and/or which warning signs, or “red flags”, were not acted upon
2. Create standardized processes for accountability with checks and balances
 - 2.1 Establish a national or metropolitan independent, lay-led entity that will address misconduct of bishops and bishop accountability and will include transparency during and after an investigation
 - 2.2 Set up a third-party reporting system for abuse, harassment, or misconduct by any Church leader
 - 2.3 Follow the example of bishops who have proactively set up their own accountability structures
 - 2.4 Use national standards and protocols for: role and responsibility of diocesan review boards, standard definitions for the accused and other major terms, retention and record keeping, release of names of all credibly accused, what a comprehensive audit process entails, and periodic, independent review of files for allegations or red flags
 - 2.5 Refer any accusation of sexual abuse made against a bishop to law enforcement and to lay leadership accountability board(s)
 - 2.6 Create ministerial codes of conduct that recognize abuse of power not only against children, but also adults
 - 2.7 Consider a regional review board model that would allow multiple dioceses that lack certain experts to come together to ensure a wide cross-section of expertise and consistency of practice
 - 2.8 Implement best practices for location and supervision of abusers, both diocesan and religious
 - 2.9 Ensure seminary curriculum addresses abuse prevention, improved human formation, personal integrity, and the experience of survivors
3. Develop proactive detection mechanisms
 - 3.1 Provide vocation directors with better training for their role and develop national standards relating to clergy selection and abuse prevention

- 3.2 Develop an early warning system that identifies struggling pastoral leaders to provide spiritual direction, fraternal correction, psychological counseling, ordered respite, and, if needed, discipline
- 3.3 Improve screening and training of international clergy so that they are aware of cultural differences and boundaries

Co-responsibility

Lait and clergy are co-responsible in leadership in the Church. Synodality is a necessary characteristic of the response.

1. Engage laity, including women, on personnel boards for clergy
2. Involve women in initial and ongoing clergy formation

Transparency

There is a need for a full accounting of the credibly accused with strengthened systems to prevent future abuse.

1. Commit to a transparent accounting of abuse
 - 1.1 Post names of all credibly accused
 - 1.2 Require that religious communities release the names of all credibly accused members in order to continue serving in a diocese
 - 1.3 Provide full financial transparency regarding all aspects of the crisis, include how donations are used
 - 1.4 Ensure all Church leaders have a fundamental understanding of the twin crises and the data, such as the John Jay reports
 - 1.5 Commission longitudinal research to gather data and disseminate best practices for responding to sexual abuse
 - 1.6 Use data to show the visible, measurable change since the implementation of the Charter to help restore trust, especially with the young and disaffiliated
2. Create systems and structures that provide a transparent accounting of abuse and share the findings of all investigations or reviews
 - 2.1 Form proactive agreements to cooperate with external, civil authorities on investigations, reports, and statutes of limitations
 - 2.2 Strengthen the audit process for the Charter for the Protection of Children and Young People so that it includes a review of dioceses, parishes, Catholic schools, and religious orders; is not self-reporting; is modeled off accreditation processes for higher education; does unannounced spot checks; creates consequences for non-compliance; and makes resources available for dioceses with financial need
 - 2.3 Commit to independent reviews of all files, including diocesan, religious, and seminaries
 - 2.4 Conduct external investigations of any diocesan seminaries or other ministries
 - 2.5 Commit to and convene truth and reconciliation commissions concerning sexual abuse and cover-up, locally or nationally
3. Provide consistent, transparent, and coordinated communications at all levels
 - 3.1 Establish a crisis communications plan and develop a proactive plan for restoring trust
 - 3.2 Identify best practices for bishops to listen to and engage parishioners that makes bishops accessible and responsive to needs

Creating a New Culture of Responding to Sexual Abuse **For Lay Leaders**

Accountability

Laity need to be involved in order to create a culture of accountability for all Church leaders.

1. Diocesan leaders, parish leaders, and other lay experts need to be involved in creating a culture of accountability.
 - 1.1 Commit to a preferential option for abuse victims and families, make it a priority to meet with survivors; keep survivors, families, and affected parishioners at all levels of decision-making
 - 1.2 Establish a national or metropolitan independent, lay-led entity that will address misconduct of bishops and bishop accountability and will include transparency during and after an investigation
 - 1.3 Identify the twin crises as the main priority for Church funding and resourcing for the immediate future
 - 1.4 Refer any accusation of sexual abuse made against a bishop to law enforcement and to lay leadership accountability board(s)
 - 1.5 Use national standards and protocols for: role and responsibility of diocesan review boards, standard definitions for the accused and other major terms, retention and record keeping, release of names of all credibly accused, what a comprehensive audit process entails, and periodic, independent review of files for allegations or red flags
 - 1.6 Develop an early warning system that identifies struggling pastoral leaders to provide spiritual direction, fraternal correction, psychological counseling, ordered respite, and, if needed, discipline
 - 1.7 Acknowledge that the Church is wounded, recognize the post-traumatic stress that these issues have placed upon clergy and laity, and respond with pastoral care
 - 1.8 Improve screening and training of international clergy so that they are aware of cultural differences and boundaries
 - 1.9 Provide vocation directors with better training for their role and develop national standards relating to clergy selection and abuse prevention
 - 1.10 Use national standards for location and supervision of abusers, both diocesan and religious
 - 1.11 Reach out to communities that may not have a culture of reporting or who may under-report for various reasons and engage them
2. Theologians, canon lawyers, and other Catholic academics need to be involved in creating a culture of accountability.
 - 2.1 Do research into the cases of abuse that continue to occur, post-Charter, and identify the procedure(s) that failed and/or which warning signs, or “red flags”, were not acted upon
 - 2.2 Seek authority for the bishops conference to modify canon law to address local realities and update canon law to include a detailed list of punishments for clearly defined crimes of abuse or cover-up by clergy, religious, or laity

Co-responsibility

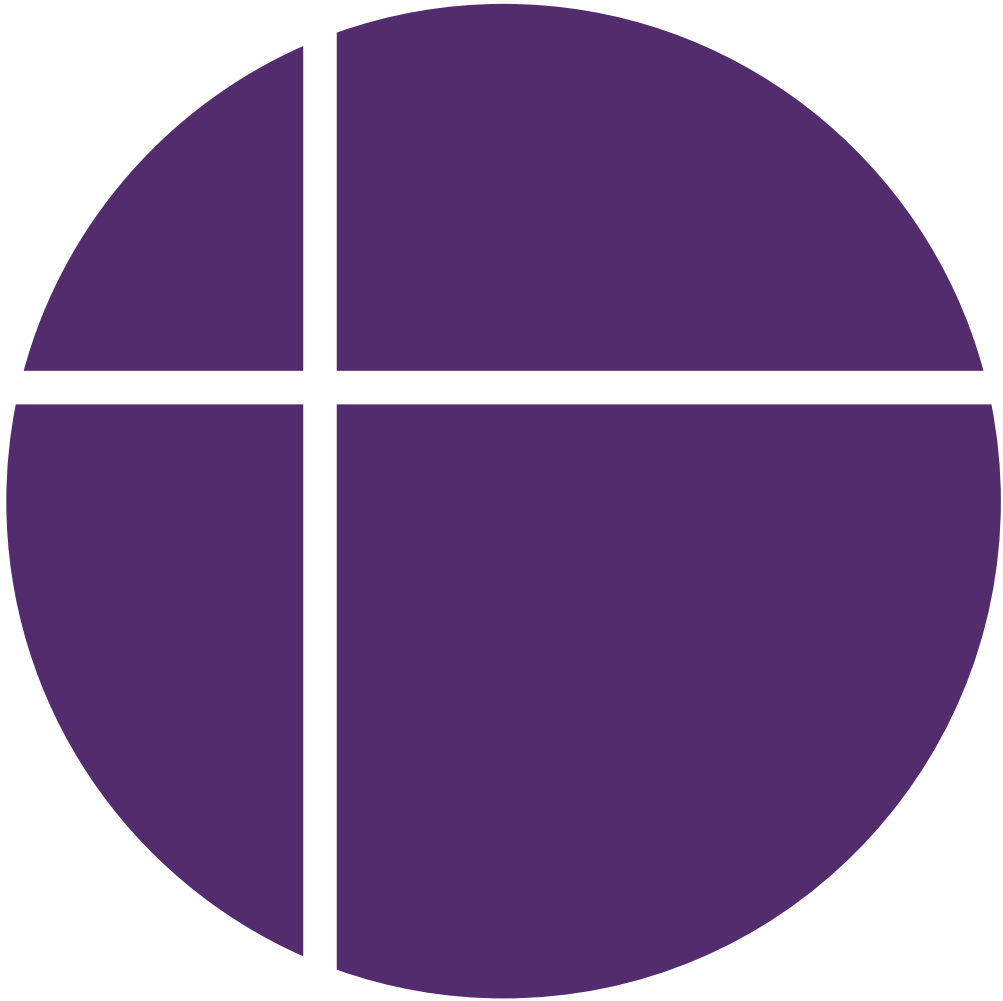
Laity and clergy are co-responsible in leadership in the Church. Synodality is a necessary characteristic of the response.

1. Diocesan leaders, parish leaders, and other lay experts need to be involved in creating a culture of co-responsibility.
 - 1.1 Engage laity, including women, on personnel boards for clergy
 - 1.2 Involve women in initial and ongoing clergy formation

Transparency

There is a need for a full accounting of the credibly accused with strengthened systems to prevent future abuse.

1. Commit to a transparent accounting of abuse
 - 1.1 Provide full financial transparency regarding all aspects of the crisis, include how donations are used
 - 1.2 Ensure all Church leaders have a fundamental understanding of the twin crises and the data, such as the John Jay reports
 - 1.3 Coordinate a national release of names to prevent ongoing trauma that happens each time more names are released
 - 1.4 Require that religious communities release the names of all credibly accused members in order to continue serving in a diocese
2. Create systems and structures that provide a transparent accounting of abuse and share the findings of all investigations or reviews
 - 2.1 Commit to and convene truth and reconciliation commissions concerning sexual abuse and cover-up, locally or nationally
 - 2.2 Commit to independent reviews of all files, including diocesan, religious, and seminaries
 - 2.3 Form proactive agreements to cooperate with external, civil authorities on investigations, reports, and statutes of limitations
 - 2.4 Strengthen the audit process for the Charter for the Protection of Children and Young People so that it includes a review of dioceses, parishes, Catholic schools, and religious orders; is not self-reporting; is modeled off accreditation processes for higher education; does unannounced spot checks; creates consequences for non-compliance; and makes resources available for dioceses with financial need
 - 2.6 Commission longitudinal research to gather data and disseminate best practices
 - 2.7 Use data to show the visible, measurable change since the implementation of the Charter to help restore trust, especially with the young and disaffiliated
3. There is a need for consistent, transparent, and coordinated communications at all levels
 - 3.1 Establish a crisis communications plan and develop a proactive plan for restoring trust



TASK FORCES:

An Architecture for Recovery and Reform

The Vatican has called for regional task forces that will help countries implement guidelines to address the twin crises of abuse and leadership failures. To do so, one proposal for the United States would be to create two interrelated task forces: the first will aid recovery and the second, reform:

- 1. Recovery:** to focus on the crisis of abuse and promote a new culture of how Church leaders respond to abuse;
- 2. Reform:** to focus on the crisis of leadership failures and promote a new culture of leadership.

Recovery Task Force

Purpose: to replace a culture of abuse and cover-up with a culture of safety and transparency and allow the light of Christ to shine

Expertise: investigatory, legal, judicial, and victim services

Tasks:

- Render full account of the credibly accused
- Extend the Charter on the Protection of Children and Young People to cover episcopal behavior
- Provide justice and meaningful support to the survivors and fairness to healthy clergy
- Prevent future abuse
- Replace the spirit of clericalism with servant leadership and advance unity

Reform Task Force

Purpose: to replace a culture of clericalism with one of servant leadership and management practices that reinvigorate the body of Christ

Expertise: institutional, systemic, and organizational

Tasks:

- Create a standards-based, transparent, and accountable servant leadership culture across the Catholic Church in the United States, in the governance, human resources, financial, and communications areas
- Replace the spirit of clericalism with servant leadership and management practices, and advance unity

Implementing each set of tasks requires an organization composed of lay, religious, and ordained leaders, women and men

SAMPLE TASKS:

Recovery Task Force

The task force focused on recovery from the sexual abuse crisis might contain the sub-elements depicted on the chart below. Further, the task force could be held responsible for coordinating the execution of the tasks listed on the chart.

	Investigation Branch	Justice and Fairness Branch	Prevention Branch
Towards a New Culture	Publicly acknowledge the sexual abuse failure, accept responsibility, engage with survivors, and begin to restore trust	Form proactive agreements to cooperate with external, civil authorities on investigations, reports, and statutes of limitations	Define clericalism, its root causes, and the various forms it takes
Transparency	Set national standards and protocols for: role and responsibility of diocesan review boards, standard definitions for the accused and other major terms, retention and record keeping, release of names of all credibly accused, what a comprehensive audit process entails, and periodic, independent review of files for allegations or red flags	Involve abuse victims at each decision-making level	Involve women in initial and ongoing clergy formation
Accountability	Convene a national working group of clergy and lay experts to help write a Code of Conduct for bishops and ensure the Charter for the Protection of Children and Young People includes bishops	Ensure seminary curriculum addresses abuse prevention, improved human formation, personal integrity, and the experience of survivors	Provide vocation directors with better training and develop national standards relating to clergy selection and abuse prevention
Co-responsibility	Establish a national or metropolitan independent, lay-led entity that will address misconduct of bishops and bishop accountability and will include transparency during and after an investigation	Consider a regional review board model that would allow multiple dioceses that lack certain experts to come together to ensure a wide cross-section of expertise and consistency of practice	Create a governance structure that is transparent with layered checks, balances, and oversight, and includes the expertise of the laity at the parish, diocesan, and national level

SAMPLE TASKS:

Reform Task Force

The task force focused on reforming the culture that permitted, then covered up, the abuses might contain the sub-elements depicted on the chart below. Further, the task force could be held responsible for coordinating the execution of the tasks listed on the chart.

	Governance Branch	Human Resources Branch	Financial Management Branch	Communications Branch
Towards a New Culture	Put in place mechanisms for greater synodality among bishops, among bishops and priests, among clergy and laity	Require best practices in human resources: effective selection, training, assignment, evaluation, compensation, and continuing education	Identify the twin crises as the main priority for Church funding and resourcing for the immediate future	Provide consistent, transparent, and coordinated communications at all levels
Transparency	Commit to and invest in creating a new culture of leadership and management that is transparent, accountable, and proactive in including lay leadership and co-responsibility	Develop and invest in ongoing formation programs in management and leadership to train clergy, religious, and laity, including bishops	Provide full financial transparency regarding all aspects of the crisis, include how donations are used	Establish a crisis communications plan and develop a proactive plan for restoring trust
Accountability	Seek authority for the bishops conference to modify canon law to address local realities and update canon law to include a detailed list of punishments for clearly defined crimes of abuse or cover-up by clergy, religious, or laity	Explore different models of training for new bishops	Build a broad, deep, and transparent financial management and accounting system	Identify best practices for bishops to listen to and engage parishioners that makes bishops accessible and responsive to needs
Co-responsibility	Commit to a diocesan governance structure that is transparent with layered checks, balances, and oversight, including a strong presbyteral council, corporate board, and diocesan pastoral and finance councils	Implement ongoing professional and personal formation and 360-degree assessments for bishops and all Catholic leaders that begins in seminaries and ministerial programs; assessments should be linked to appointments	Implement ongoing best practices training for all Catholic leaders, covering, financial management, decision-making, pastoral management, etc.	Use data to show the visible, measurable change since the implementation of the Charter to help restore trust, especially with the young and disaffiliated

Leadership Roundtable's Next Steps

Leadership Roundtable was founded in the wake of the sexual abuse crisis of 2002. The clergy, religious, and lay Catholics who gathered at our first convenings knew that the Church was facing twin crises: a crisis of abuse, as well as a crisis of leadership failures. For nearly 15 years, Leadership Roundtable has been a collaborative partner to Church leaders in the areas of leadership and management.

In February 2019, we convened the Catholic Partnership Summit, detailed in this report and provided preliminary recommendations to U.S. representatives to the Vatican meeting on abuse. **As the Church continues to address the twin crises, Leadership Roundtable recommits to our mission of being a trusted partner for Church leaders.** Through our ongoing services and programs, we seek to transform the leadership and management culture of the Church in the United States.

We call upon Catholic leaders and the wider Catholic community to join us in addressing the root causes, as well as creating a new culture of leadership and a new response to abuse. We commit to work with Catholic leaders to:

- create and widely disseminate the outcomes and recommendations from the Catholic Partnership Summit, in particular we will share actionable recommendations with USCCB leadership, diocesan leadership, and religious communities,
- convene stakeholders regionally and nationally to address the twin crises focused on recovery and reform,
- partner with Catholic academic institutions to initiate a study on the root causes of the leadership failures and cover-up,
- partner with bishops and other Catholic leaders to develop models of enhanced synodality,
- convene experts to identify emerging best practices to address the twin crises of leadership failures and abuse,
- partner with diocese and religious orders to implement performance evaluation tools for bishops and provincials;
- provide dioceses with the capacity to do culture change through Leadership Roundtable's Mission Management Model.

For more information on how you can respond to the twin crises, visit
leadershiproundtable.org/crisis

NEXT STEPS: DIOCESAN CULTURE CHANGE

Leadership Roundtable helps diocesan leaders implement culture change to respond to the twin crises. The following frameworks are illustrative of our extensive work in this area and are available in greater detail for diocesan implementation.

Key Principles for Addressing the Twin Crises

When diocesan leaders address the twin crises of abuse and leadership failures, the principles upon which their actions should be based must be: mission-focused, transparent, accountable, competent, and grounded in justice, in order to restore trust.

Recognizing the Time Frame

There should be consideration given to immediate, mid- and long-term responses. Additionally, the crisis is multi-generational. This crisis will impact the Catholic Church in the United States across at least three generations: those who directly experienced the abuse crisis, those who did not directly experience the crisis, but were impacted by it, and those who did not directly experience the crisis.

The Pace of Recovery

The pace of recovery will be influenced by the degree to which the Catholics in the diocese experience a Church that is supporting survivors; being proactive and mission-focused; led by people who are competent, healthy, and holy; transforming its management and leadership culture towards best practices; and restoring trust.

Key Indicators of Systemic Diocesan Change

As progress is made, there is measurable increase in the quality of ministry, for the sake of the mission. Key indicators include:

- Diocesan leaders work from a strategic plan so that there is internal alignment and coordination
- Intentional choices are made around cultures of leadership, formation, and management
- There is external and internal accountability
- Fiscal management and budgeting is mission-focused
- The executive-level leadership team is highly effective
- There is ongoing leadership formation and development
- Effective consultative structures use discernment for matters of importance
- There is ongoing evaluation for programs, services, and administration
- Both lay and ordained leaders have robust performance evaluation systems
- There are effective means for communication across the diocese
- Catholics have a renewed sense of trust in their pastoral leaders
- Diocesan leaders are once again focus outward, on mission

NEXT STEPS: MISSION MANAGEMENT MODEL

IT STARTS WITH A CONVERSATION

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

Our Mission Management Model always starts with a conversation, whether we get a call from a bishop struggling with diocesan finances or a diocesan leader who wants to improve his/her pastoral planning efforts. This conversation leads to a comprehensive assessment of where the parish, diocese, or community currently stands along the *Model*. We then work with Catholic leaders to create a customized roadmap to help them move towards excellence in mission management for the benefit of the people being served.

MISSION-DRIVEN

The choice to focus on management excellence is a pastoral decision. Missionary discipleship and evangelization have greater impact when the mission is well-managed and well-led. The Mission Management Model is the only system-wide model for moving a diocese to managerial excellence for the sake of the mission. Applying a comprehensive model simultaneously impacts mission, structure, resources, and the culture of a diocese. As temporal affairs improve, diocesan leaders, pastors, and parishioners can increasingly focus more on the Gospel mission of forming disciples, providing ministries, and discovering the joy of the gospel.

INCREMENTAL AND TAILORED

Our Mission Management Model is built on years of experience that show us that small steps are the building blocks for transformative change. At the pace they choose, dioceses move through the six stages -- assisted by their trusted partner, Leadership Roundtable. One of the keys to success is for the diocese to only take on as much as is realistic for them to do so at any given time. While the time frame for achieving stage six varies, each diocese is encouraged to focus

on achieving continuity of progress in manageable periods. Ongoing evaluation of progress and benchmarking built into the *Model* allows dioceses to see how far they have come and to see the impact of their work on their mission.

Leadership Roundtable has always emphasized that the mission of mercy of the Catholic Church needs to be at the forefront in the use of best pastoral and strategic business and managerial practices that are ethical, ecclesial, practical, user-friendly, and capable of being implemented.

Bishop John Barres,
Diocese of Rockville Centre

A PARTNER FOR THE JOURNEY

Each diocese receives a designated Leadership Roundtable staff member as a point of contact. Partnering with Leadership Roundtable connects dioceses to a network of experts and resources.

Since our founding, we've been dedicated to learning what Catholic leaders need and forming the solutions together. Our staff, faculty, and consultants are Catholics with extensive experience in theology, pastoral ministry, and business acumen. Our intention is to build the internal capacity of a diocese and its parishes so that its management culture is transformed and serves the diocesan mission not just now, but into the future.

SIX STAGES OF THE MISSION MANAGEMENT MODEL



1. AWARENESS



2. START



3. PLAN



4. IMPLEMENT



5. EMBED



6. THRIVE

6 Steps of the Mission Management Model



1. AWARENESS

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



2. START

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



6. THRIVE

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

Providing Catholic institutions with a **ROADMAP FOR INTEGRATING BEST PRACTICES** into their mission



3. PLAN

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



5. EMBED

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



4. IMPLEMENT

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

LIST OF EXPERT CONTRIBUTORS

Michael Brough

Deputy Director, Leadership Roundtable

John Carr

Founder and Director of the Initiative on Catholic Social Thought and Public Life at Georgetown University

Francesco C. Cesareo, Ph.D.

President of Assumption College
Chair, National Review Board

Cardinal Blase J. Cupich

Archbishop of Chicago

Barbara Anne Cusack, J.C.D.

Chancellor, Archdiocese of Milwaukee

Kim Daniels

Associate Director, Initiative on Catholic Social Thought and Public Life at Georgetown University

James M. Dubik

Lieutenant General (Retired), U.S. Army

Geno Fernandez

Board Member, Leadership Roundtable

Fr. J. Bryan Hehir

Secretary for Health and Social Services,
Archdiocese of Boston

Alexia Kelley

President and CEO, FADICA, Foundations and Donors Interested in Catholic Activities

Elizabeth McCaul

Global Head of Strategy, Promontory Financial Group, an IBM Company Chairman (Interim), Promontory Europe

Kathleen McChesney, Ph.D.

CEO, Kinsale Management Consulting

Bishop Shawn McKnight, S.T.D.

Bishop of Jefferson City

Susan Mulheron, J.C.L.

Chancellor for Canonical Affairs,
Archdiocese of St. Paul and Minneapolis

Cardinal Seán O'Malley, O.F.M. Cap.

Archbishop of Boston

Tim O'Malley

Director of Ministerial Standards and Safe Environment, Archdiocese of Saint Paul and Minneapolis

Archbishop Christophe Pierre

Apostolic Nuncio to the United States

Brian B. Reynolds, Ed.D.

Chancellor and Chief Administrative Officer,
Archdiocese of Louisville

Kerry Robinson

Global Ambassador, Leadership Roundtable

Kim Smolik, Ed.D.

CEO, Leadership Roundtable

Cardinal Joseph W. Tobin, C.Ss.R.

Archbishop of Newark

Fr. Hans Zollner, S.J.

President, Centre for Child Protection (CCP) of the Pontifical Gregorian University, Rome

BOARD OF DIRECTORS

EXECUTIVE COMMITTEE

Mr. Robert Gasser

Co-Chair and Treasurer of the Board

Ms. Susan King

Co-Chair, Dean, School of Journalism and Mass Communication, University of North Carolina, Chapel Hill

Ms. Elizabeth McCaul

Chief Executive Officer of Promontory Europe, Promontory Financial Group, an IBM Company

Dr. Kimberley Smolik, Ed.D.

CEO, Leadership Roundtable

Mr. Geoffrey T. Boisi

Chairman & Chief Executive Officer Roundtable Investment Partners LLC

Mr. Hans Brenninkmeyer

Mr. Kevin Carton

Retired Senior Practice Partner PricewaterhouseCoopers (PwC)

Ms. Kendra E. Davenport

Chief Development Officer Operation Smile

Mr. Daniel Denihan

Principal Tenth Avenue Commerce

Lt. Gen. (Ret.) James M. Dubik

U.S. Army

Kevin J. Dwyer

Board Advisor SupplyLogic

Dr. Geno Fernandez

Global Head of Brokerage Solutions Aon

Fr. Michael J. Garanzini, SJ

Secretary for Higher Education, Society of Jesus Center for Global Jesuit Education, Fordham University

Mr. Frederick W. Gluck

Former Managing Director McKinsey & Company

Mr. Bryan F. Grane

Executive Vice President Forward Air Corp.

Mr. Thomas J. Healey

Partner Healey Development LLC

Rev. J. Bryan Hehir

Secretary for Social Services Archdiocese of Boston

Mrs. Victoria Kennedy

Dr. Kathleen McChesney

Chief Executive Officer Kinsale Consulting

Hon. Michael Montelongo

President and CEO GRC Advisory Services LLC

Mr. Paul C. Reilly

President Raymond James Financial, Inc.

Mr. Brian B. Reynolds, Ed.D.

Chancellor and Chief Administrative Officer Archdiocese of Louisville

Rev. John J. Wall

President Catholic Extension

DIRECTORS EMERITI

Rev. John Beal, III

Ms. Betsy Bliss

Ms. Mary Brabeck

Mr. Anthony Brenninkmeyer

Justice Anne Burke

Dr. Francis Butler

Mr. Gregory Case

Mr. BJ Cassin

Mr. W. Douglas Ford

Dr. Carol Fowler

Dr. Norman Francis

Dr. Charles Geschke

Dr. Patrick Harker

Sr. Carol Keehan, D.C.

Rev. Edward Malloy, C.S.C.

Rev. Donald Monan, SJ

Mr. Charles Moore

Mr. Leon Panetta

Mr. Richard Powers, III

Ms. Kerry A. Robinson

Ms. Darla Romfo

Rev. Thomas Smolich, S.J.

Dr. Richard Syron

Thanks to our Catholic Partnership Summit Sponsors

BENEFACTOR

Boisi Family Foundation

Ms. Kathleen S. Craft

Cushman Foundation

John and Cyndy Fish, Suffolk Cares Charitable Foundation

Peter and Carolyn[†] Lynch

PATRON

Catholic Health Association of the United States

Kevin J. Conway

Dan and Kathleen Denihan

The Gabelli Family Philanthropic Fund

Gallagher | Global Religious Practice

Bryan and Stephanie Grane

Tom and Meg Healey

John and Virginia Kaneb

Elizabeth McCaul

Montrone Family Charitable

Thomas S. Murphy, Jr.

Robert and Kate Neihaus

The O'Toole Family Foundation

Jim and Molly Perry

Porticus North America

Raskob Foundation for Catholic Activities, Inc.

John and Dorothy Shea

PARTNER

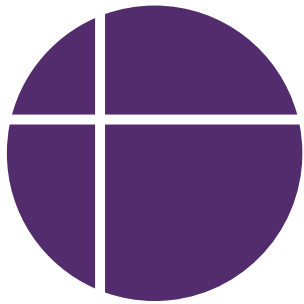
The Heffernan Family Foundation

Peter S. and Ann L. Robinson

Dominic and Leona Tarantino

Anonymous





LEADERSHIP ROUNDTABLE

Service. Excellence. Church Management.

Leadership Roundtable promotes best practices and accountability in the management, finances, communications, and human resources development of the Catholic Church in the U.S., including greater incorporation of the expertise of the laity.

415 Michigan Ave NE, Suite 275 | Washington, DC 20017

202.635.5820 | leadershiproundtable.org