

# PLAN OF ACTION



## National Leadership Roundtable on Church Management

*The following recommendations are outgrowths of the two-day 2005 NLRCM Conference at The Wharton School. They reflect the knowledge, insights, and creative thinking of some of the country's top leaders from the corporate and nonprofit worlds, together with members of the U.S. Catholic Church hierarchy. Collectively, the Plan of Action is a recommended, initial course of action for the NLRCM over the next several years.*

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### NLRCM PROGRAM PRIORITIES

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*The eight NLRCM Program Priorities refer to activities that can be developed and implemented by the NLRCM itself; each has the potential to affect the full range of Church business operations.*

1. Establish and continually update a directory of leading professionals in the fields of management, human resources, and finance to serve as a valuable resource to dioceses and parishes. The NLRCM would identify and promote the competencies of these experts through its website ([www.nlrcm.org](http://www.nlrcm.org)).
2. Develop and publish a library of best practices in the areas of Church management, human resources, and finance. These best practices would be aimed at dioceses, parishes, religious communities, and other Church organizations and would be promoted through the NLRCM website ([www.nlrcm.org](http://www.nlrcm.org)) and other media.
3. Clearly define and adapt *The Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector* for use by the Church. This activity would be carried out through “demonstration” dioceses, parishes, religious communities, and other Catholic organizations with the expectation of a national rollout by the end of 2007.
4. Establish an annual National Best Practices Awards Program as a way of recognizing, rewarding, and promoting excellence among dioceses and parishes in the areas of management, finance, and personnel.
5. Promote and disseminate NLRCM DVD sets for parishes and dioceses that allow local faith communities to assess the management, finance, and human resource challenges and opportunities, and work toward incorporating best practices in these areas.

6. Plan and sponsor an annual meeting of bishops and members of the NLRCM to discuss and thoroughly assess the temporal needs of the Church in the United States; develop creative, practical solutions to problems facing the Church; and set, monitor, and further refine the NLRCM Plan of Action in a way that provides maximum benefit to the Church.
7. Oversee the development of a long-term strategy designed to help the Church regain trust and credibility in the United States. This, in turn, requires actively promoting a culture of excellence and developing a comprehensive human resources program.
8. Provide experienced management counsel and assistance to those bishops who are working diligently to rebuild the Church infrastructure in Louisiana and Mississippi in the wake of Hurricane Katrina.

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### **BEST PRACTICE DIOCESE/PARISH ACTIONS**

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*The 13 Best Practice Diocese/Parish Actions require the active participation of the dioceses and parishes; each affects Church operations in the areas of management, human resources, or finance.*

#### **Management**

1. Define and promote models of what constitutes clear and powerful strategic planning within the dioceses.
2. Develop the framework for a centralized diocesan database of skilled individuals and services that could be shared among parishes, particularly those lacking in these areas. This group would offer support in such areas as youth ministry, music, fundraising, insurance, and printing, as well as management, information technology, finance, and human resource development.

#### **Human Resources**

3. Create comprehensive job descriptions, performance metrics, and compensation benchmarks for every position within the diocese and parish held by Church leaders and professional laypeople. These parameters—designed to help foster a culture of excellence, accountability, and vocational development—would include mission, objectives, performance, compliance, outcomes, training, and motivational systems.
4. Develop models of a 360-degree Personnel Review System for employees of the diocese and parish. This system—which has become the gold standard in the private sector—would provide job performance feedback from peers, higher-ups, and others to whom employees and the Church are accountable. It should be focused on developing the skills and competencies of (a) bishops, (b) pastors, (c) diocesan staff, (d) parish staff, and (e) boards/councils. It should also be aimed at continuous improvement and positive reinforcement rather than on critical evaluation. A Personnel Review System that enjoys the support and full participation of the bishop in the diocese would be easiest to implement.

5. Identify and spotlight a system to review, enhance, and provide parishioner feedback on the quality of clergy preaching in the spirit of guidance and continuous improvement.
6. Adopt the concept of *lifelong* education for every Church employee, in accordance with the tenets of *The Basic Plan for Ongoing Formation for Priests* that was recently adopted by the United States Conference of Catholic Bishops. At higher levels, this learning initiative could be patterned after the executive leadership programs found at many of the nation's top colleges and business schools. Lifelong education should focus on strengthening critical skill sets in the general areas of administration, finance, and personnel management. Catholic universities with their tremendous resources could be an integral part of this training/formation program.
7. Create mentoring programs that help pastors and other Church leaders to handle better the complexities and, at times, the loneliness of their jobs by pairing them with experienced coaches or mentors.
8. Develop and promote education and training (both managerial and theological) for lay ecclesial ministers, religious, priests, and bishops.
9. Develop and promote thoughtful succession plans for priests and lay leaders.

## Finance

10. Promote openness, honesty, and transparency in Church finances by publishing and disseminating to members an annual financial statement or report summarizing all expenditures and receipts, as well as describing the financial health of the diocese or parish. This document should be comprehensive (reporting on all Church operations, including schools, cemeteries, health facilities, and any other assets of which the bishop or his representative has titular control), and both backward- and forward-looking. In addition, it should be written in a *reader-friendly* way that is intelligible to Church members who do not have financial backgrounds. Reinforce this reporting system through periodic "town meetings" where parishioners are free to raise questions or express concerns they may have to Church leaders.
11. Employ economies of scale by establishing multi-diocese or multi-parish cooperatives for the purchase of goods and services. This concept of centralized purchasing has become standard operating procedure within the private and government sectors, and could potentially help the Church realize significant savings on its annual operating budget.
12. Improve productivity and cost-efficiencies by standardizing computer hardware and software platforms among parishes and Catholic schools, particularly in the area of accounting. One benefit is having access to information that allows finance personnel to spot and analyze potential problems and make appropriate adjustments.

13. Develop and promote a comprehensive and strategic fundraising approach for Catholic dioceses, parishes, religious communities, and other Catholic organizations that is mission-driven, financially transparent, and aspires to have a positive, transforming effect on the whole community. This approach should be grounded in Scripture and Catholic tenets, should understand donors as subjects rather than objects, should promote and celebrate excellence at all levels, and should inform and engage Catholics more deeply in the mission of the Church.