

# NATIONAL LEADERSHIP ROUNDTABLE ON CHURCH MANAGEMENT

Celebrating 5 Years of Service to the Church 2005–2010



# 2010

## Annual Report

In 2005, a group of dedicated and energetic Catholic executive leaders founded The National Leadership Roundtable on Church Management to carry out a simple yet profound goal: strengthen the Church's practices in management, finances, and human resource development so that it can focus more fully on its vital mission. With 2010 marking five years of service to the Church, we are pleased to offer this extensive report.

The Leadership Roundtable benefits from positive relationships with Church leaders at every level, and these bonds result in multitudes of life-giving programs, successful consulting engagements, and positive contributions to the Church.

With a presence in each of the 15 Catholic regions of the United States as demarcated by the United States Conference of Catholic Bishops, the Leadership Roundtable works with parishes, dioceses, and Catholic schools and nonprofits to provide guidance and assistance with their temporal needs.

Our work is possible because of the generosity and commitment of our donors, volunteers, friends, board of directors, and staff.

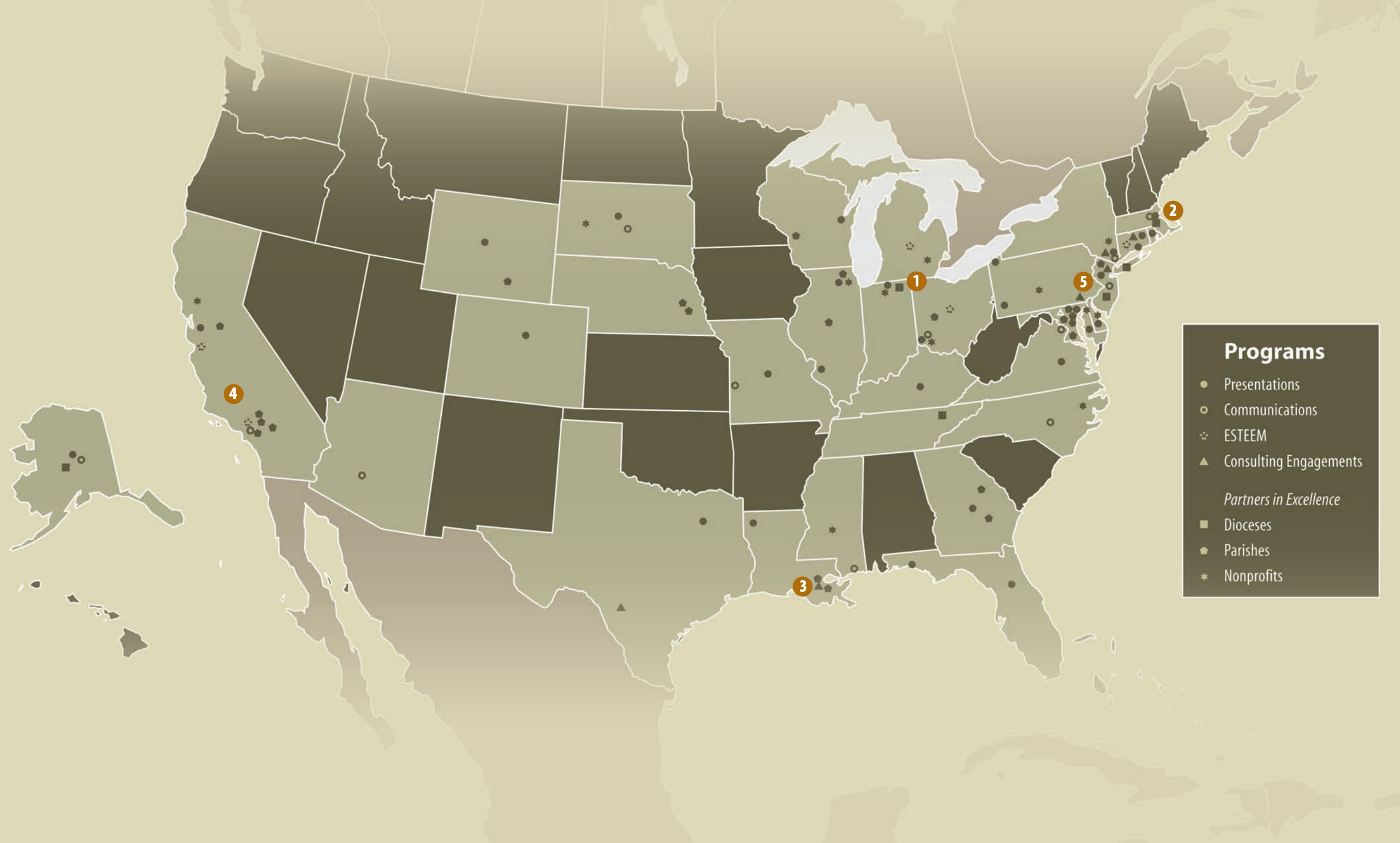
We encourage you to review this report, to become more familiar with our work, and to be engaged in this transformative mission. As we take time to celebrate the joys and accomplishments of our first five years, we look eagerly toward the future, with renewed commitment to serve effectively and faithfully the Church we love.

Sincerely,

*Geoffrey T. Boisi*      *Kerry A. Robinson*

Geoffrey T. Boisi  
Chair

Kerry A. Robinson  
Executive Director



### The Leadership Roundtable by the Numbers

- 10,154** Standards for Excellence Codebooks Distributed
- 1,967** Church in America DVDs Delivered
- 317** Total Partners in Excellence
- 200** Council Members
- 58** Media Outlets Reporting on the Leadership Roundtable
- 25** Dedicated Trustees
- 24** Dioceses with Partners in Excellence
- 18** Completed Consultancy Engagements
- 16** Strategic Alliances
- 15** Catholic Nonprofit Partners in Excellence
- 15** USCCB Regions with Leadership Roundtable Presence
- 13** Leadership Roundtable Publications
- 10** Special Meetings for US Bishops
- 8** University Partnerships
- 7** National Conferences
- 7** Best Practices Awards
- 6** Full-time Staff Members
- 6** Social Media Platforms
- 5** Years of Service
- 3** Newly Redesigned Websites
- 1** **Mission: To be of Service to the Church**



## 1 Leadership Roundtable Services

*"The Standards for Excellence have helped us as a diocese, and parishes within the diocese, focus on the mission of Jesus. They've proven themselves a valuable tool that provide benchmarks for accountability and transparency, particularly in the areas of management, human resources, and finances. They are bringing greater energy and vitality to our parishes."*

—Most Rev. Dale J. Melczek, Bishop of Gary, IN

The cornerstone of all our programming is **Standards for Excellence**, 55 benchmarks that give Catholic parishes, dioceses, and nonprofits the peace of mind that comes with knowing that they are in compliance with contemporary best practices and faithful stewardship of resources. With over 300 Partners in Excellence representing 24 dioceses and 15 non-profits, exclusive web resources for Partners, and a recent independent study confirming the benefits of implementing the Standards, Catholic Standards for Excellence is the go-to resource for institutions looking to maximize their resources to focus more fully on their mission.

Other ways the Leadership Roundtable serves the Church include:

- **ChurchEpedia.org**, our free online clearinghouse of best practices in management, finance, human resource development, and communications
- **CatholicPastor.org**, an online community for Catholic priests to share ideas, reflect on ministry, and offer support and encouragement in a secure setting
- **Church in America**, the DVD and workbook resource for diocesan and parish planning that offers simple and effective ways for pastoral councils, finance councils, pastoral staff, and parishioners to discuss issues of Church management in their parishes or dioceses and implement new plans
- **Parishioners Guide to Understanding Parish Finances** and other publications, available for free download on our website and for purchase from St. Anthony Messenger Press, including reports highlighting themes of management, finances, human resources, and communications

## 2 Collaboration

*"We recognized the need to equip talented, young adult Catholics with a contemporary theology of Church and the skills to be leaders. In order to reach a wide group of students, we turned to the Leadership Roundtable. Their network of dedicated members and their ability to see projects through to completion makes them an excellent partner and we look forward to the success of ESTEEM."*

—Rev. Robert Beloin, Chaplain, Saint Thomas More, The Catholic Chapel & Center at Yale

The Leadership Roundtable collaborates with other organizations that are making a positive impact in the life of the Church. **ESTEEM**—Engaging Students to Enliven the Ecclesial Mission—perfectly illustrates this model. With the aim of harnessing the skills and talents of young adult Catholics, the Leadership Roundtable and St. Thomas More Catholic Chapel & Center at Yale empower them with the tools to serve on finance boards, lead communications campaigns, and be of service to the Church immediately upon graduation. More information is available at [www.esteemleadership.org](http://www.esteemleadership.org).

A sense of shared responsibility guides all of the Leadership Roundtable's projects, including:

- **The Pastor's Toolbox**, a weeklong seminar with Seton Hall University and the International Institute for Clergy Formation that trains pastors to be more competent with finances, management, and human resources
- **Catholic Leadership 360**, a venture with the National Federation of Priests' Councils and the National Association of Church Personnel Administrators, which offers a unique assessment tool and leadership development program for lay and ordained leaders
- **Diocesan Planning for Excellence**, a step-by-step guide designed by top Church and business planning experts offering a clear and powerful strategic pastoral planning process for use by Catholic dioceses

## 3 Consulting

*"Let me express my appreciation for the assistance that has been rendered by the Leadership Roundtable to the Archdiocese of New Orleans in a way that has been very respectful of the pastors, the principals, and the central administration of the archdiocese. They have helped us to develop a responsible approach to a new venture on our part in the devastated areas of the archdiocese: to launch central schools where we had multiple schools that are not yet able to reopen."*

—Most Rev. Alfred C. Hughes, Archbishop of New Orleans, speaking to the consultancy services provided to the archdiocese following Hurricane Katrina

When Hurricane Katrina devastated the gulf region of the United States in 2005, the Archdiocese of New Orleans responded quickly and ably to offer residents a return to comfort: opening Catholic schools as quickly as possible, for any child, regardless of whether she or he was Catholic. To ensure maximum efficiency with this bold venture, the Archdiocese turned to the Leadership Roundtable's consulting services. With a team of experts from some of the nation's top consulting firms, the Leadership Roundtable guided the revitalization process in New Orleans with precision, expertise, and dedication. The result is a school system that is well managed and able to meet the complex needs of the local Church.

The Leadership Roundtable has provided its consulting services to myriad organizations, covering a broad range of issues. Specifically, the Leadership Roundtable has assisted dioceses and religious orders with 18 individual projects, in the areas of:

- comprehensive governance;
- finance;
- development;
- school planning; and
- strategic planning.

In addition to onsite assistance, the Leadership Roundtable offers the Church two powerful tools that promise to maximize resources, allowing the Church to focus more effectively on its mission. Now in pilot phases, the Coordinated Procurement Plan and Strategic Portfolio Management project maximize the resources of the Church. By pooling both the buying power and the investment capital of Catholic dioceses, schools, and hospitals, the Church will save money and have more resources to utilize for its mission.

## 4 Insight and Ideas

*"The Catholic Schools Office of the Diocese of Memphis has a record of visionary leadership and management, a system change for a ten year period of time. Bishop Steib articulated a strong and clear vision for the Catholic school mission and values in his diocese, and for reopening and sustaining Catholic schools in the inner urban section of his city. Dr. Mary C. McDonald, the superintendent of the Catholic school system, has carried out that mandate in an extraordinary fashion."*

—Mr. Geoffrey T. Boisi, presenting the 2008 Leadership Roundtable Best Practices Award to the Diocese of Memphis Catholic School System

The Leadership Roundtable identifies Catholic organizations and institutions that strive to implement best practices in their management, finances, and human resource development. At our Annual Meeting held each year at the Wharton School, we recognize such organizations and present them with the **Leadership Roundtable Best Practices Award**. This is one way that we hold up what works well in the Church and promote it to others.

Honorees include:

- **Catholic Relief Services** 2010
- **Most Rev. Dale J. Melczek and the Diocese of Gary** 2010
- **CatholicsComeHome.org** 2009
- **Diocese of Memphis Catholic School System** 2008
- **St. Vincent DePaul of Baltimore** 2007
- **Center for Social Concerns at The University of Notre Dame** 2007
- **Archdiocese of Boston Financial Transparency Project** 2006

Our members are in the field, making a difference, affecting change. Good ideas from one place deserve to be emulated elsewhere, and the Leadership Roundtable helps to spread the good news.

We offer insight at hundreds of conferences, workshops, and seminars throughout the country as keynotes, panelists, and seminar leaders. Major media, including CNN, NBC, the New York Times, USA Today, and Sirius Radio, seek out our members for commentary. We produced a series on effective Church management with Catholic TV, America's Catholic Television Network, and we consistently promote best practices and inspire innovation in every aspect of the Church.

## 5 Convening Power

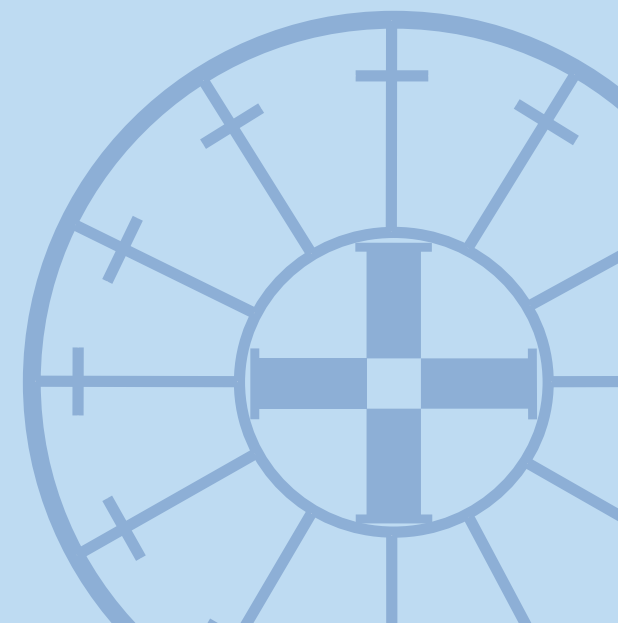
*"For us, as Christians and members of the Catholic Church, I think it's always important that we return to our central purpose, which is to demonstrate God's love and compassion and to be in the service of other people. That is what this Church is about at her best; what it always has been and always will be. It's where we come together from all different walks of life, equal before God, and we partake of Communion before God."*

—Prime Minister Tony Blair, addressing the 2009 Annual Meeting

Convening and engaging high-level executives and Church leaders is at the core of what the Leadership Roundtable does best: bringing together top talent and harnessing their collective wisdom and expertise to serve the Church. The Leadership Roundtable gathers each year at The Wharton School at the University of Pennsylvania to find solutions to the Church's temporal challenges. Focusing on management, finances, human resources, or communications, each conference provides our members time for collaboration, with the goal of constructing concrete resources for Church leaders, lay and ordained. Previous speakers include:

- **Rt. Hon. Tony Blair**, The Prime Minister of the United Kingdom
- **Mr. Larry Bossidy**, AlliedSignal
- **Most Rev. Michael J. Bransfield**, Diocese of Wheeling-Charleston
- **Mr. Cesar Conde**, Univision Communications, Inc.
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- **Mr. Tom Tierney**, The Bridgespan Group
- **Mr. Fay Vincent**, Major League Baseball

Our ability to attract the very best to be of service to the Church is recognized as a valuable asset, prompting US bishops to turn to us for insight and ideas. In 2009, Cardinal Francis George asked the Leadership Roundtable to host a special meeting for Church leaders on the state of the economy, and each year we offer a workshop, attended by scores of bishops, at an annual gathering of the United States Conference of Catholic Bishops, on topics especially related to their managerial priorities.



The Leadership Roundtable is grateful to those institutions and individuals whose generosity makes our work possible. Many in Catholic parishes, dioceses, schools, and nonprofit organizations benefit from this support. Thank you.

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*\*This list reflects donations made through December 31, 2009.*



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# Financials

Year ended December 31	2009	2008
<b>Assets</b>		
<b>Current Assets</b>		
Cash	\$ 654,838	495,037
Accounts receivable	633	0
Prepaid Expenses	3,132	3,838
Promises to give, current portion	35,000	295,000
Inventory	23,932	26,380
<b>Total Current Assets</b>	<b>\$ 717,535</b>	<b>820,255</b>
<b>Promise to give, net of current portion</b>	<b>\$ 285,000</b>	<b>285,000</b>
<b>Property and equipment, net</b>	<b>\$ 10,963</b>	<b>15,721</b>
<b>Liabilities</b>		
<b>Current Liabilities</b>		
Accounts payable and accrued expenses	\$ 43,462	20,332
Deferred revenue	10,585	
<b>Total Liabilities</b>	<b>\$ 54,047</b>	<b>20,332</b>
<b>Net assets</b>		
Unrestricted	\$ 201,997	643,749
Temporarily Restricted	472,454	456,895
<b>Total Net Assets</b>	<b>\$ 674,451</b>	<b>1,100,644</b>
<b>Total Liabilities and Net Assets</b>	<b>\$ 728,498</b>	<b>1,120,976</b>

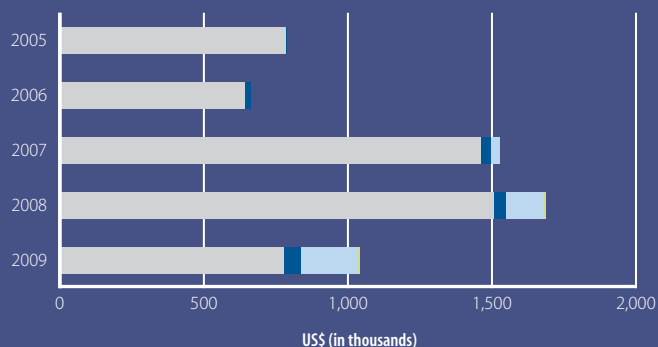
The National Leadership Roundtable on Church Management is an independent, nonprofit organization. Support of our programs is provided through donations and grants and fees for our consulting services, publications, and conferences. Since we were founded in 2005, more than \$6,000,000 has been provided to help carry out the mission to strengthen the management, finances, and human resource development of the Church. We are grateful to everyone whose generosity and efforts have made it possible.

Our financial statements for 2009 reflect a deficit of \$426,193; the result of investment in the development of our programs and the expansion of our staff to meet increased service demands. This planned investment was possible due to generous contributions received in previous years. As a result of increased revenue from the expansion of our development team and the creation of new consulting services, rigorous financial discipline will result in a return to a surplus by the end of fiscal year 2010 or shortly thereafter. In keeping with generally accepted accounting principles, multi-year pledges are recorded in the year in which they are received and not in the years that they are collected and spent. For this reason, revenue and expenses do not always correspond in a single fiscal year.

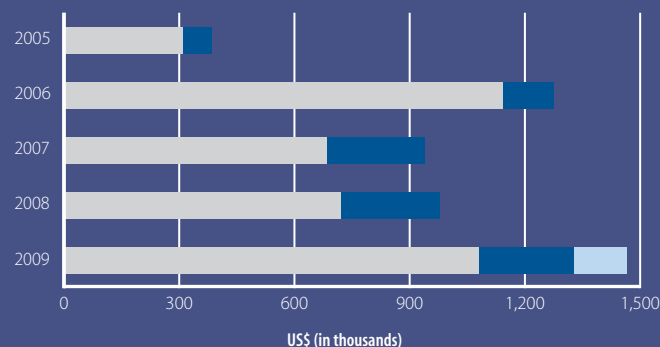
Additional financial information is available on our IRS Form 990, available on our website.

Not reflected in our financial statements are the countless hours of service provided by volunteers, members of our board and committees, our council, and our friends. The value of their service to our mission and the future of the Church is beyond measure, and we extend our deepest thanks to them.

### Sources of Funds 2005–2009



### Use of Funds 2005–2009



# Imagine...

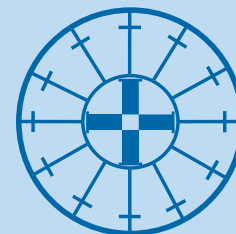
- More volunteer/parishioner involvement
- More time to dedicate to parishioners in need
- More resources to support the parish mission

# ...it's already happening...

**Become a Partner in Excellence.**

**Visit [www.CatholicStandardsForExcellence.org](http://www.CatholicStandardsForExcellence.org)**

The National Leadership Roundtable on Church Management exists to promote best practices in the management, finances and human resource development in the Catholic Church. The Leadership Roundtable's flagship effort, Catholic Standards for Excellence is a proven resource that maximizes the operational excellence and stewardship of resources for parishes and dioceses. This resource is also designed for Catholic nonprofits, Catholic Charities, religious orders, and Catholic schools.



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visit our website at [www.TheLeadershipRoundtable.org](http://www.TheLeadershipRoundtable.org)