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Parishes discover road to operational excellence

by Tom Gallagher

Michael J. Brough is director of planning and programs for the Washington-based National Leadership Roundtable on Church Management. He coordinates the organization's Standards for Excellence program and successfully completed training as a licensed consultant with the Standards for Excellence Institute. NCR spoke with Brough about the program.

NCR: The National Leadership Roundtable for Church Management has developed a new tool called 'Standards for Excellence.' What exactly is this tool?

Brough: The Standards for Excellence are a comprehensive blueprint for responsible and effective management of dioceses, parishes and Catholic nonprofits in the 21st century. There are 55 best-practice standards housed under eight guiding principles (see accompanying sidebar), all founded on the notions of uncompromising ethics, accountability and stewardship within the Catholic church.

What is the theological underpinning of the Standards for Excellence?

The U.S. bishops stated clearly in their 1992 Pastoral Letter on Stewardship that sound business practice is fundamental to good stewardship, and stewardship as it relates to church finances must include the most stringent ethical, legal and fiscal standards.

The past decade or so has been an extraordinary period of difficulties for dioceses amid the sexual abuse scandals and settlements, bankruptcies, priest-theft cases and the closures of parishes throughout the country. The Standards for Excellence seem to have arrived in the nick of time.

We believe that a new era of faithful stewardship in the fields of fiscal management, governance, human resources and fundraising has arrived and that a cultural change is taking hold in Catholic dioceses and parishes across the country.

Isn't what you're proposing a threat to existing policies and ways in which dioceses and parishes function?

We're not talking about reinventing the wheel. In fact, the Standards for Excellence draw on best practices that already exist in the corporate, nonprofit and philanthropic arenas, and even within some parishes and dioceses.

The Standards for Excellence seem pretty straightforward. What is your biggest challenge in rolling them out?

The challenge for us is to weave them into the fabric of the church. More specifically, the Standards for Excellence offer the church sound direction on what policies and practices are necessary for effective financial controls and accurate financial reporting. They also pinpoint how conflicts of interest can be averted among pastoral and finance council members and staffs; how a parish can develop human resources policies that are fair and allow for meaningful performance evaluation and development; what information should be shared regularly with parishioners and the public; and much more.

Can you provide an example of a diocese that has adopted the Standards for Excellence?

The Gary, Ind., diocese is leading the effort as the very first diocese to pilot and introduce the Standards for Excellence across all its parishes. In 2007, Bishop Dale Melczek asked his Priests' Council to become the pilot site for the Standards for Excellence and the council agreed.

So how did this pilot study get implemented?

Over the course of three months beginning in December 2008, five training sessions were held at parishes across the diocese, to which Bishop Melczek invited pastors, associate pastors, parish staff, and parish pastoral council and finance council members. Lasting around two hours each, these sessions provided an introduction to the standards as well as concrete examples of their application and benefits. A year later, an additional training session was held at the diocesan offices, this time targeting directors of religious education and Catholic school principals.

How has the pilot study gone?

The University of Notre Dame recently published a study that underscored the Gary diocese's success in rolling out the new ethics and accountability code among its 70 parishes. The study found that 90 percent of priests across the diocese were familiar with the initiative and were working toward its full implementation. Parishes were already feeling the impact of the standards as evidenced by the fact there had been a statistically significant change in attitude within five of the eight major areas (the "guiding principles") addressed by the standards, and that all areas were now receiving greater attention within the diocese.

The standards establish a needed common ground between parishes and dioceses, improve communications (especially of diocesan policies), and promote great synergy with diocesan efforts.

Specifically, how is your organization disseminating the Standards for Excellence?

We have undertaken an ambitious program to not only acquaint Catholic parishes, dioceses and nonprofits nationally with its template for change, but implement it across their organizations and institutions as part of an initiative known as Partners in Excellence. Three different versions of the code -- for parishes, dioceses and Catholic nonprofits -- have been compiled, each fully compliant with canon law. They are available in both Spanish and English in order to serve as many parishes as possible.

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Even enthusiastic lay Catholics who want to engage their parishes oftentimes face resistance to change.

That task is daunting given the church's slow pace of change in this area. We have distributed nearly 10,000 copies of the Standards for Excellence at the grass-roots level, and even more encouraging is that over 300 parishes representing 30 different dioceses nationwide have become Partners in Excellence, including for example, the Anchorage, Alaska, archdiocese, the Boston archdiocese, Knoxville, Tenn., diocese, and the Passaic, N.J., eparchy. They are in various stages of implementing the guidelines.

What other ways are making known the importance of the Standards for Excellence?

An increasing number of Catholic colleges and universities provide courses in church management. Fordham University in New York City, for example, has integrated the standards into a new offering from the graduate schools of business and religion to reach current and future parish leaders.

We also provide support through a set of 22 free education resource packets that are available online to parishes, dioceses and Catholic nonprofits.

Where do you go from here?

Our goal is to operationalize the standards in every Catholic parish and organization in the country.

[Tom Gallagher writes *NCR's* Mission Management column. Contact him at tom@tomgallagheronline.com.]

Eight guiding principles of the Standards for Excellence

Mission Statement and Ministry Program: Parishes are established to continue the mission of the Catholic church and carry out that mission through specific ministry programs.

Governance and Advisory Bodies: Effective parish advisory bodies (i.e., parish finance councils and parish pastoral councils) serve to further the mission of the organization; establish management policies and procedures; ensure that adequate human and financial resources are available; and actively monitor the organization's performance.

Conflict of Interest: Clergy and laity who serve the parish in either paid or volunteer positions should act in the best interests of the parish, and not seek to further their own interests or those of third parties.

Human Resources: Parish human resource policies should address both clergy and laity, paid staff and volunteers, and should be fair, establish clear expectations, and provide for meaningful and effective performance evaluation.

Financial and Legal: Parishes must practice sound financial management and comply with diverse legal and regulatory requirements, including those of canon law.

Openness: Parishes operate in the name of the church in service to -- and with support from -- their members and the community at large. As such, they should provide the faithful and the public with information about their mission, ministry program activities, and finances.

Fundraising: Fundraising activities should be conducted by parishes on a bedrock of truthfulness and responsible stewardship.

Public Life and Public Policy: Parishes provide an important vehicle by which individuals may organize and work together to improve their communities and represent Catholic social teaching and the interests of the people they serve.

-- Tom Gallagher

Web Sites

The National Leadership Roundtable on Church Management
www.theleadershiproundtable.org

Standards for Excellence
www.catholicstandardsforexcellence.org

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