



## **POSITION DESCRIPTION**



**Catholic Leadership**  
**INSTITUTE**

## **VICE PRESIDENT OF PHILANTHROPY**

**JUNE 2018**

## CONFIDENTIAL POSITION DESCRIPTION

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| <b>POSITION</b>     | Vice President of Philanthropy                               |
| <b>ORGANIZATION</b> | Catholic Leadership Institute                                |
| <b>REPORTS TO</b>   | Daniel “Dan” Cellucci   Chief Executive Officer              |
| <b>LOCATION</b>     | Wayne, Pennsylvania  |
| <b>WEBSITES</b>     | <a href="http://catholicleaders.org">catholicleaders.org</a> |

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## ORGANIZATIONAL OVERVIEW

Founded in 1990, Catholic Leadership Institute (CLI) provides bishops, priests, deacons and lay persons in the Roman Catholic Church with world-class, pastoral leadership formation and consulting services that strengthen their confidence and competence in ministry, enabling them to articulate a vision for their local church, to call forth the gifts of those they lead, and to create more vibrant faith communities rooted in Jesus Christ.

### VISION

CLI sees a world where each individual understands their God-given mission in life and is doing their best to fulfill it; a world where Catholic leaders are influential voices in society; a world where Jesus' example of loving, servant leadership is modeled in every family, workplace, parish, and community.

### PROGRAMS

#### Diocesan Consulting Services

Catholic Leadership Institute’s consulting ministry is making a difference in the leadership and care of bishops and in the renewed energy and focus of dioceses.

CLI provides respectful direction and facilitation as it applies to building strong leadership teams, discerning diocesan priorities, and diocesan envisioning.



### CORE VALUES

- ▼ Love of Christ and the Church
- ▼ Highest standards of excellence
- ▼ Care for the individual



CLI consulting opportunities come in many developing forms that are written to mold to unique situations. Below are two examples of services in support of the bishop and his shepherding of his local diocese:

- ▼ Build & Maintain a Cohesive Leadership Team – A service for a bishop’s key staff. Over the course of four days of facilitated conversation and team decision making, the bishop and his cabinet develop quality, collaborative relationships among themselves and became a strong, focused leadership team for the diocese.
- ▼ Discern & Proclaim a Mutually Shared Vision and Diocesan Priorities – This service helps to guide a bishop and his prayerfully discerned Envisioning Leadership Team with the creation of a Mutually Shared Vision for the diocese. This Mutually Shared Vision includes a sacred purpose, core values, a five-year statement of vision, and three priorities.



These services are structured to facilitate strong, collaborative relationships between key staff and team members as well as between team members and their bishop as a means to develop quality ministry and respectful communication between all persons and accompanying decisions.

### **Support for Bishops: Episcopal Ongoing Formation & Support**

CLI respectfully offers Episcopal Ongoing Formation & Support sessions in thanksgiving for bishops' shepherding ministry.

These sessions provide skill building and coaching to bishops as they envision a strong future for their local churches and respond to the leadership challenges they encounter. Along with leadership skill building, each three-day session offers fraternity and prayer that enable a bishop to contemplate his role and leadership responsibilities in service to his local Church.

These sessions are supported and endorsed by Catholic Leadership Institute's Episcopal Advisory Board and its Episcopal Moderator, Archbishop Gregory Aymond. More than 162 bishops have participated in these sessions.

### **World Class Leadership Formation for Priests: *Good Leaders, Good Shepherds***

Using Jesus Christ, the Good Shepherd, as the ultimate model of leadership, *Good Leaders, Good Shepherds* is a world-class curriculum that celebrates and supports the ministry of Catholic priests.

Given the demands of ministry and the complexity of running parishes – and for many priests, multiple parishes – effective leadership is paramount to creating and building authentic, vibrant Catholic communities. Good



Leaders, Good Shepherds is designed to help priests overcome today's challenges of a diminishing number of clergy and more complex circumstances for priestly ministry.



Through formation in *Good Leaders, Good Shepherds*, priests can minimize the frustration and energy that they spend on their administrative roles, and instead, maximize the joy and time spent on the pastoral duties for which they were uniquely ordained.

CLI's mission is to help strengthen priestly identity, ministry, and fraternity. CLI believes this happens best when priests take time for themselves, in the company of one another, to learn, pray, socialize, and look to the future with hope.

Ultimately, the impact of this formation will be more holy, healthy, and happy shepherds of vibrant parish communities, leading more people to a deeper relationship with Christ.

#### **Equipping Priests and Lay Leaders: Graduate & Diocesan Services**

Graduate & Diocesan Services support the ongoing application of best leadership practices, continued formation in leadership skills, and fraternal support begun in *Good Leaders, Good Shepherds*.

Through an integration of three components – *Fraternal Forum, Tending the Talents*, and Coaching – Graduate & Diocesan Services fosters a shared culture of leadership within parish and diocesan communities. As bishops, priests, deacons, and parish and diocesan leaders are united by a mutually shared vision, and are working out of a common framework for leadership, CLI believes the Kingdom of God will be experienced more vibrantly and fruitfully.

Graduate & Diocesan Services:

- ▼ Fraternal Forum offers the priest graduate from *Good Leaders, Good Shepherds* further leadership learning and support.
- ▼ *Tending the Talents* offers parish and diocesan leaders an opportunity to be formed in the same leadership practices taught in *Good Leaders, Good Shepherds*.
- ▼ Coaching provides *Fraternal Forum* participants with individual mentoring by an experienced Catholic Leadership Consultant.



### **Online Learning and Resources: Catholic Leaders Online**

Catholic Leaders Online is a space devoted to supporting CLI participants with online leadership tools and resources.

Participants can learn new leadership skills through self-paced learning activities such as the following: watching short videos, discussing a topic with peers in ministry, recording reflections on new learning, participating in polls, and scripture reflections.

Participants can also apply their new leadership skills by working through activities such as the following: case studies, reflections, leadership scenarios, recreating leadership models, and Implementing next steps in ministry.

By offering new leadership learning and tools to apply leadership within parish and diocesan life, Catholic Leaders Online supports the ongoing formation of Catholic leaders around the country.

### **Transformational Discipleship Formation: Parish Missionary Disciples**

Parish Missionary Disciples is a ministry that seeks to transform the individual disciple and empower them to share their encounter with others, so they too can be transformed. In order to support parish leaders in living out these two callings, CLI is honored to offer Parish Missionary Disciples. The desired result of Parish Missionary Disciples is a parish community reawakened and transformed by the person of Jesus Christ and on fire to share that encounter with others, so that they too can be transformed.

Parish Missionary Disciples engages believers and transforms them into missionary disciples to:

- ▼ Pray and teach another to pray
- ▼ Share the Gospel with another
- ▼ Share their own testimony
- ▼ Accompany another on their Catholic discipleship journey

### **Knowing Parishioners and Supporting their Spiritual Growth: The Disciple Maker Index**

The Disciple Maker Index is a 75-question parish survey tool that provides comprehensive feedback to support the pastor and parish leadership in focusing and strengthening ministry priorities. The Disciple Maker Index invites parishioners to reflect on where they are on their individual journey of discipleship, as well as the effectiveness of their parish in supporting that journey. As of 2018, the tool has been used in more than 400 parishes in 23 dioceses throughout the United States and Canada. More than 100,000 parishioners have participated, providing a rich resource of helpful benchmarks from parishes of all settings and sizes.



## Creating the Next Generation Parish: Next Generation Parish Pilot

In October 2017, CLI launched the first of five to seven diocesan Next Generation Parish pilots as part of creating models of parish life for the Next Generation. CLI plans to accompany 60 diverse parishes from around the country in implementing the Four Key Factors of a Next Generation Parish in the following ways:

- ▼ Comprehensively ASSESS the parish health, culture, and effectiveness
- ▼ ENVISION the future by creating a parish plan with priorities and goals
- ▼ TRAIN and SUPPORT priests, staff, and parishioners in leadership and evangelization
- ▼ EMPOWER parishes to sustain and expand their pool of leaders
- ▼ MEASURE impact, REFINE plans, and CELEBRATE successes

CLI will measure impact through improved Mass attendance, increased collections, and its unique assessment tool, the Disciple Maker Index. CLI will also track and assess other critical indicators that support the Four Key Factors of a Next Generation Parish.

As a result of participating in this four-year experience with Catholic Leadership Institute, parishes will receive analysis, training, consulting, and support that will result in:

- ▼ A comprehensive review of parish resources of time, talent, and treasure
- ▼ Guided support on improving communication in the parish
- ▼ A Strategic Plan for the parish with focused priorities and goals
- ▼ Parish leaders who are equipped to provide training and discipleship to other parishioners
- ▼ Professional development for those in parish leadership
- ▼ Collaboration and modeling of best practices that other parishes in the diocese can use as an example and resource

*“Catholic Leadership Institute isn’t just a vendor. They are a partner who really walks with us through every opportunity and challenge.”*

The Next Generation Parish has the ability to make an incredible impact. Every parish has the potential to be a Next Generation Parish...and CLI is prepared to help.

*See Appendix beginning on Page 14 for information about CLI’s senior leadership and history.*





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## CONTEXT FOR RECRUITMENT AND POSITION SUMMARY – VICE PRESIDENT OF PHILANTHROPY

Catholic Leadership Institute is playing a critical role on behalf of the Roman Catholic Church of today and tomorrow. CLI is helping the Church to navigate generational shifts, to respond to and prepare for ever-mounting demographic challenges among ordained religious and the laity, to establish a near-term vision for the Church in the U.S., and to define an overall roadmap for the Church’s future. The organization is accompanying Catholic parishes, dioceses, and their leaders – from the seminarian to the seasoned bishop to lay leaders – on their journeys amid the complexities of the modern world, supporting them in meeting corresponding challenges and opportunities with the benefit of world-class training, fresh perspectives, and intentionality. CLI and its partners are indeed helping to build a future of hope for Catholic generations to come, one where the Church is not only sustaining but thriving with vibrant communities rooted in Jesus Christ.

CLI has already strengthened the Church through its work with tens of thousands of Church leaders and is poised for even greater impact as the nonprofit apostolate currently enjoys the best financial and overall organizational standing in its history. Propelled by entrepreneurial, visionary administrative leadership and the strategic, active engagement of multiple boards, CLI realized its most successful fundraising to date during the past two years, securing \$4.85 million in FY 2017 and projected to secure more than \$3.75 million during FY 2018. Yet, to meet the future needs of the Church, CLI must continue to enhance its fundraising profile, building on the over 500 lifetime donors to the organization. CLI’s senior stakeholders will be engaging in visioning and strategic planning during summer 2018 to further shape organizational priorities and corresponding fundraising goals.

Amid this favorable context of forward-thinking leadership and organizational stability, CLI is seeking candidates for the role of Vice President of Philanthropy (Vice President). Reporting to the Chief Executive Officer (CEO), the Vice President serves as chief development officer and is responsible for working with the Board of Directors, Mission Implementation Team, National Advisory Board, Episcopal Advisory Board, and other volunteer ambassadors to discern, develop, and execute a vision for philanthropy at CLI that will grow donors’ hearts and provide the philanthropic investments required to support world-class leadership formation for the Roman Catholic community. The Vice President manages a team of five, with a projected Major Gift Officer opening in FY 2018. S/he will also closely collaborate with CLI Founder Tim Flanagan, who has historically driven the majority of CLI’s major donor relationships, as an extension of the Philanthropy team.

### IMPACT BY THE NUMBERS

- ▼ **102** - Total partner dioceses where services have been delivered
- ▼ **162** - Bishops who have participated in Episcopal Ongoing Formation & Support Sessions
- ▼ **2,639** - Number of priests graduated from *Good Leaders, Good Shepherds*
- ▼ **742** - Seminarians served through any CLI service
- ▼ **24,970** - Parish and diocesan staff served through any CLI service



The Vice President serves on the CLI Leadership Team and is expected to influence the overall direction and culture of the organization.

The Vice President will be a central figure in the ongoing success and vibrancy of CLI, enabling it to vigorously pursue its mission while taking the organization to its next level of philanthropic achievement by coalescing strategic priorities with a robust development program. S/he will construct development strategies and execute plans that will markedly increase individual (including annual, major, planned, and blended gifts), foundation, and other philanthropic support. Among the specific areas of focus and enhancement under the Vice President's leadership will be the following: building a sustainable individual major gifts program, including ensuring that prospects and existing donors are appropriately assigned and managed, and proactively pursuing prospect discovery; ensuring that major donor relationships are primarily inspired by CLI's mission and activities and can be maintained and advanced by multiple senior leaders of the organization; developing an effective direct response/annual giving program to provide unrestricted support for CLI and to serve as a pipeline for future major gifts; working in partnership with the CEO to develop strategic marketing and communications initiatives that will help bring greater clarity and prominence to CLI's brand, and support the organization's philanthropic endeavors.

CLI seeks candidates who are dynamic, highly-organized, goal-oriented, and strategic, with outstanding presentation and writing skills, a keen sense of organizational diplomacy, and deep experience in philanthropic best practices. The successful candidate will be a proven leader, manager, mentor, and collaborative colleague who is comfortable leading major initiatives and supporting the leadership of others, and who has a track record of effectively leading organizational change. (Note: CLI is not an ideological platform or advocacy organization.)

## **SPECIFIC RESPONSIBILITIES**

### **Overall Visioning, Strategy, and Goal Setting:**

- ▼ As a member of the Leadership Team, discern, create, and implement a vision and plan for CLI to serve and support the leadership development needs of the Roman Catholic Church.
- ▼ In consultation with the CEO, set annual and multi-year fundraising goals for CLI. Construct a comprehensive strategy and execute plans to establish the infrastructure and processes for a sustainable, comprehensive, major-gifts-focused development program; increase awareness of and affinity for CLI's mission in the philanthropic community; and secure increasing levels of funding to meet current and future programmatic, and operational needs. Collaborate with the CEO to identify and refine CLI's giving priorities, and to translate those priorities into compelling opportunities for philanthropy and persuasive proposals.
- ▼ Develop and implement an overall strategic plan for special events in support of constituency engagement and enhancing CLI's profile. Maximize events and the visitor experience so they are highly





valued by patrons and other constituents, are cost effective, and appropriately relate to donor discovery and/or annual and major gift strategies.

#### **Prospect Strategy and Frontline Fundraising:**

- ▼ Oversee the ongoing discovery of new major gift prospects, identification of lower-level donors to the organization who may have greater capacity, and both traditional and non-traditional sources of potential support whose interests may align with CLI priorities. Maintain knowledge of important developments within regional, national, and Catholic funding environments as they relate to CLI's mission and projects.
- ▼ Manage a portfolio of current and prospective donors at the highest levels of giving capacity, including both individual and institutional sources, moving them through the stages of cultivation, solicitation, and stewardship. Plan, coordinate, and execute initiatives for major gift prospects, ensuring that prospects and donors are aligned with board, event, or other activities appropriate to their interests, and that their CLI-related activities advance their relationship with the organization.
- ▼ Lead and oversee effective cultivation and solicitation opportunities that involve the CEO, Founder, board members, and other senior stakeholders of CLI. Personally staff these senior leaders as appropriate in their development-related activities. Exercise sound judgment and efficiently communicate prospect strategies when involving administrative or board leaders. Serve as the catalyst in strengthening a culture of philanthropy intended to permeate all areas of the institution.
- ▼ Ensure high-quality, individualized, and meaningful stewardship of donors, including coordination with colleagues throughout CLI as needed.
- ▼ The position requires 50 percent or more travel to support CLI priorities, including personal cultivation and solicitation, strategic communications, and special events.

#### **Marketing and Communications:**

- ▼ In partnership with the CEO and leveraging support from the staff, develop and coordinate strategic marketing and communications in support of CLI's overall brand, strategic priorities, and philanthropic initiatives, while also optimizing diverse platforms for donor engagement.
- ▼ Oversee all special events, direct mail, and electronic correspondence to keep stakeholders informed of CLI's progress and current and future philanthropic opportunities.

*"I was excited for ordination but also very nervous. Thanks for the reminder that God is with me in so many ways, including the ministry of CLI."*

#### **Management:**

- ▼ Oversee the hiring, managing, mentoring, training, and evaluation of an experienced and highly talented staff, fostering an environment of commitment, passion, and professionalism. Set appropriate annual and professional development goals, and monitor progress on a regular basis in order to maximize staff performance.



- ▼ Recruit, guide and motivate teams of volunteer ambassadors and solicitors to achieve philanthropic goals in support of CLI's strategic direction.
- ▼ Prepare regular reports regarding fundraising activities and progress for the CEO, Leadership Team, Board of Directors, National Advisory Board, and Episcopal Advisory Board, and, as appropriate, for broader distribution.
- ▼ Analyze CLI's philanthropic activities, and benchmark against other organizations and trends to ensure CLI is on track and employing best practices.
- ▼ Optimize processes, systems, and infrastructure. Oversee growth, maintenance, and enhancement of staff members' technological proficiency and tools.
- ▼ Ensure sound fiscal management and good stewardship of resources dedicated to philanthropic initiatives.

**Working with the Board of Directors, National Advisory Board, and Episcopal Advisory Board:**

- ▼ Actively partner with the CEO and board leadership on board management, including identification and recruitment of new members, education of board members about their role in advancing a culture of philanthropy for CLI (as appropriate for each respective body), cultivation and solicitation of their financial support (if appropriate), and leveraging of their respective networks to expand the donor base.
- ▼ Work with the chairs of the various boards and their subcommittees to develop action plans that maximize the skills and abilities of board members to further the goals of CLI, and to steward their contributions of time, talent, and treasure to the organization.

**REQUIRED QUALIFICATIONS AND EXPERIENCE**

- ▼ Bachelor's degree required; advanced degree and/or Certified Fund Raising Executive credential preferred.
- ▼ A minimum of 10 years of experience in progressively responsible development leadership positions, which includes work in all functional areas (individual giving, institutional giving, planned giving, stewardship, board relations), oversight of comprehensive philanthropic program, and leadership in a major capital campaign (planning, implementation, management, and successful conclusion). Demonstrated ability to successfully work in an entrepreneurial nonprofit setting that prioritizes new donor discovery and engagement.
- ▼ Demonstrated ability to provide management oversight, leadership, and direction with at least five years of supervisory experience, including creating and managing a budget. A strong record of recruiting and developing talented individuals, and a supportive and accessible management style that brings out the best in staff and fosters pride, ownership, and collaboration. A history of increasing the



effectiveness of a development program and staff through established objectives and performance standards.

- ▼ Knowledge of the dynamics of a national-scale nonprofit organization and of the Roman Catholic Church are preferred, including familiarity with diocesan and parish structures, and a thorough understanding of Catholic parish life and ministry.
- ▼ Particular strength in developing the case for support and strategic, complex fundraising plans, and executing against those plans to achieve goals and objectives. Experience working directly with the most senior levels of an organization is very important, as is the ability to effectively strategize and engage various groups and constituents. Demonstrated ability to translate concepts into multi-stakeholder initiatives.
- ▼ Demonstrated ability to strategically move individuals and institutions across the spectrum of prospect development, culminating in solicitations appropriate to organizational priorities and donors' interests. A history of securing six and seven-figure gifts, including cultivation through solicitation and stewardship, as well as experience working with annual fund strategies to effectively groom the next generation of annual leadership and major gift donors. Success in securing gifts from both defined and undefined constituencies.
- ▼ Demonstrated ability in planning and executing strategic communications to complement philanthropic initiatives and achieve goals. Ability to craft compelling narratives for external audiences. Experience identifying and coaching project spokespeople. A functional understanding of how to effectively leverage various communication mediums and distribution channels to support philanthropic initiatives and CLI's brand awareness.
- ▼ Experience identifying, nurturing, and motivating board or other volunteer leaders, and a sophisticated understanding of their role in building an effective fundraising network.
- ▼ Highly developed skills in organizational efficiency and project leadership, including demonstrated accomplishments while working with cross-functional teams. Skill at goal setting and measuring success, and agility in addressing alternate program directions to meet goals when necessary. Proven success driving a strategic planning process and executing sustainable programs.
- ▼ The ability to extract and analyze data to make effective, efficient decisions about donor strategy and process. A working knowledge of modern data management practices and techniques, including database information systems, data modeling, and analysis. Familiarity with technology and other

*"A pastor needs to be able to get his parishioners engaged in the church's activities. The more engaged, the better the parishioner is in following Christ's work and supporting the missions of the church. This takes leadership."*

-Donald "Boysie" Bollinger,  
donor to CLI and former  
CEO of Bollinger Shipyards



innovations that can streamline the development process and contribute to the integration of advancement functions.

#### **ADDITIONAL PERSONAL QUALITIES AND COMPETENCIES**

- ▼ Demonstrated commitment to the respective missions of the Roman Catholic Church and CLI. Ability to communicate and generate excitement about CLI's mission, vision, programs, and fundamental strengths.
- ▼ Values-driven, self-confident, self-aware, and committed to personal and professional development. Must elevate institutional goals and values beyond personal gain, recognizing when collaboration or complementing oneself with others is in the best interest of achieving desired outcomes.
- ▼ Unimpeachable integrity and trustworthiness; mature judgment in handling sensitive and confidential information.
- ▼ Visionary leadership skills, and the ability to effectively engage and partner with various groups and constituents, including administrative, programmatic, and board leaders; ordained and lay leaders of the Roman Catholic Church, and other diocesan stakeholders; and individual and institutional fundraising prospects, existing donors, and major benefactors.
- ▼ A penchant for diplomacy and the ability to work collaboratively with other colleagues within CLI and the broader Catholic community while demonstrating respect for differences, cultural sensitivity, and a commitment to diversity. Must be a team builder who embraces the ethos of servant leadership and empowers subordinates to achieve goals while providing necessary support and resources.
- ▼ Outstanding organizational skills, with the ability to effectively implement and complete projects on a timely basis and to manage multiple priorities. A self-starter who is intellectually curious and possesses a sense of urgency, clear set of priorities, strong work ethic, and the ability to adeptly manage and navigate in an entrepreneurial environment. Must have a creative approach to problem solving and the ability to take advantage of emerging opportunities. A commitment to continuous improvement.
- ▼ Excellent written, verbal, and public speaking skills, including the presence and ability to interact and influence at all levels of an organization. A communication style that is open, cordial, and persuasive.
- ▼ A consistently optimistic persona, a good sense of humor, and a high energy level.



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## SEARCH TEAM

**GERARD F. CATTIE, JR.**

Managing Director

Founder and Practice Leader, Development & Philanthropy

Diversified Search

212.542.2587 | [gerard.cattie@divsearch.com](mailto:gerard.cattie@divsearch.com)

**MANUEL A. GONGON, JR.**

Principal

Diversified Search

215.656.3588 | [manuel.gongon@divsearch.com](mailto:manuel.gongon@divsearch.com)

**BETH REEVES**

Vice President and Senior Associate

Diversified Search

212.542.2584 | [beth.reeves@divsearch.com](mailto:beth.reeves@divsearch.com)

**TAMMY SCHILLIN**

Executive Assistant | Project Manager

Diversified Search

212.542.2575 | [tammy.schillin@divsearch.com](mailto:tammy.schillin@divsearch.com)

Search #13501 | 2018



## APPENDIX

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### LEADERSHIP

#### DANIEL “DAN” CELLUCCI

Chief Executive Officer, Catholic Leadership Institute

As CEO for Catholic Leadership Institute, Dan Cellucci is responsible for the mission, vision, and all day to day operations of one of the U.S. Catholic Church's fastest growing apostolates. Dan has been a long-time member of the Catholic Leadership Institute community, beginning as a young adult participant in 2001 and serving for the past 11 years in several different roles in the organization. Prior to his election by the Board of Directors to the role of Chief Executive Officer in 2016, Dan served as Senior Vice President for Episcopal and Client Services, directing the marketing and service fulfillment for diocesan partners as well as the continuous improvement of Catholic Leadership Institute's programs. Some of the most recent special projects he has been blessed to lead for dioceses includes the *On Mission for The Church Alive!* In the Diocese of Pittsburgh, the Second General Synod for the Archdiocese of Miami and the training partnership for the Archdiocese of Boston's pastoral plan *Disciples in Mission*. Dan also plays a primary leadership role with CLI's Disciple Maker Index, a parish survey tool that seeks to help pastors and pastoral leaders focus their efforts toward the mission of evangelization and has reached 433 parishes in 23 dioceses across North America, resulting in over 100,000 responses in the past five years. Dan began his full-time career with CLI in communications and philanthropy, doubling the apostolate's annual fundraising revenue over his four-year tenure. Prior to joining CLI full-time, Dan worked in admissions at Neumann University after graduating from the University of Richmond. Dan, his wife Tricia, and their four children are parishioners of St. Thomas of Villanova Parish in Villanova, Pennsylvania.



Dan Cellucci

#### TIMOTHY “TIM” FLANIGAN

Founder, Catholic Leadership Institute

Tim is the Founder and Chair of Catholic Leadership Institute. His passion for leadership development stems from his own leadership training experience and his love of the Catholic Church. In 1989, after attending a leadership retreat in Pecos River, New Mexico, Tim felt an incredible call to bring the best in leadership development to the Catholic Church. He partnered with Rev. Charles Pfeffer, then Director of the Office for Youth and Young Adults for the Archdiocese of Philadelphia, to develop CLI.



Tim Flanigan





Under his leadership Catholic Leadership Institute has reached national prominence; serving more than 91 dioceses in the United States, Caribbean, and Canada. The two-year ongoing priestly formation program *Good Leaders, Good Shepherds* offered by the Institute, combines the science of leadership with the teachings of Jesus Christ and the Catholic Church.

Through this program priests are taught more efficient and effective ways to lead, inspire and motivate their flocks. CLI was recognized with the 2009 President's Distinguished Service Award from the National Organization for Continuing Education of Roman Catholic Clergy (NOCERCC) for their work with clergy through the program, *Good Leaders, Good Shepherds*. CLI was the first organization ever to be honored with this prestigious award.

In 2009, CLI launched *Tending the Talents*, a program for parish and diocesan staff and lay leaders. This curriculum complements *Good Leaders, Good Shepherds* and helps clergy and lay leaders work together to create vibrant parish communities.

Tim's professional career has spanned over 38 years of award-winning performance in the financial services industry. He has been a national sales leader, sales manager, corporate executive and business owner. In January 2003, he sold his business to devote his energy full-time to CLI.

Tim has been trained by The Center for Creative Leadership, American Management Association Leadership Program, Stephen Covey's Principle Centered Leadership Institute, and Pecos River Learning Center. Among his prestigious accolades include the designation of Chartered Leadership Fellow by The American College and the 2007 St. Augustine Award from Malvern Prep. In 2006, he and wife, Terese, were recognized by Maynooth College in Ireland for their lives of service.

Tim is a graduate of St. Charles Borromeo's Seminary Church Ministry Program and has served as a lector and Eucharistic Minister, Board Member of Prayer Power, Philadelphia Chapter of Legatus, and is a former member of Cabrini College's Board of Trustees. In 2008, he was installed as a Knight of The Equestrian Order of the Holy Sepulchre of Jerusalem by His Eminence, Edward Cardinal Egan.

In 2010, Tim received the Father Edward J. Sourin Award from the Catholic Philopatrian Literary Institute and was bestowed an honorary degree from Holy Family University in Philadelphia, Pennsylvania. He is a 1965 graduate of Villanova University with a degree in economics.

Tim has been married for 50 years to his wife, Terese. Parishioners at Saints Peter and Paul Parish in West Chester, Pennsylvania, Tim and Terese have five children and 14 grandchildren.



## **WILLIAM “BILL” OROSZ**

Chair, Board of Directors, Catholic Leadership Institute  
President and Chief Executive Officer, Hanover Capital Partners, Hanover Land Company

Bill Orosz graduated cum laude with a B.A. in Economics from Dartmouth College in 1971 and received his master’s in business administration from the Harvard Business School in 1973. A resident of Central Florida since 1981, his entire working career has been focused within the real estate industry. He now leads a family-owned real estate development and investment company co-managed with his three sons. The company is engaged in residential land development, home building, commercial/industrial investment property and mezzanine financing. Bill has built more than 21,000 homes and developed more than 75 residential communities over the past 35 years.



*Bill Orosz*

In addition to business endeavors, the Orosz family is committed to involvement in and support of many community initiatives. The Orosz Family Foundation supports religious, educational, and medical research initiatives in the Central Florida community and is a founding benefactor of the Tocqueville Program at the University of Notre Dame. Bill has served as Chair of the Finance Committee for the Diocese of Orlando, is founding Chair of the Catholic Foundation of Central Florida, is a member of the President’s Advisory Council for Fellowship of Catholic University Students (FOCUS) and previously served on the board of The Augustine Institute.

Bill is married to his wife, Jody (41 years) and enjoys spending time with the families of their three boys and nine grandchildren.

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## **HISTORY**

In 1990 a successful Catholic businessman, Tim Flanagan, discovered his mission in life on an executive leadership retreat in Pecos River, New Mexico. Tim felt a profound sense of calling to bring to the Catholic Church the very best in leadership and personal development programs to help people understand their purpose in life and reach their God-given potential as leaders in our world.

When he returned from New Mexico, he began to network with other Catholic leaders to share his vision. As fate (or the Spirit) would have it, Tim eventually crossed paths with Father Charles Pfeffer, then Director of the Office for Youth & Young Adults in the Archdiocese of Philadelphia. Although Fr. Pfeffer’s office had many effective programs in place for the youth in the diocese, efforts to connect young adults (ages 21-39), while well intentioned, had been ineffective. Fr. Pfeffer realized that if programs for young adults were established in parishes, the key to their ongoing success would be leadership, ideally peer leadership. Where, however, could he find leaders among that age group who possessed the self-confidence, courage, skills, and faith to



undertake such a challenging task? “Well, if they don’t exist,” he thought, “they need to be created . . . but how?”

Tim shared with Fr. Pfeffer his experience with corporate training programs and his vision of utilizing those corporate methods to benefit the Church. Tim made a 10-year commitment to building a leadership course for young adults; Fr. Pfeffer committed the services and facilities of his office and staff; and thus was born the Catholic Leadership Institute. The two men drew on Tim’s experience with the Pecos River Learning Center, a division of Aon Consulting, founded by well-known corporate consultant Larry Wilson. They specifically adopted the Center’s course entitled Leaders Experiential Adventure Program (LEAP). The LEAP course was designed to serve as a “wake-up call,” alerting participants to the fact that they have a unique purpose in life and the power to effect positive changes in their personal lives and their careers.

For the first five years, with an all-volunteer staff, Tim and CLI ran the Leaders Experiential Adventure Program for young adults and other parish and diocesan leaders. In the mid-1990s, other programs were added to continue the leadership development process for graduates. All courses used Jesus’ example as the ultimate model of leadership and helped participants to live their faith in all aspects of their life.

In 1999, Matt Manion, a successful marketing executive and graduate of CLI, approached Tim and Fr. Chuck. He offered to volunteer a year of his life to serve the organization in a full-time capacity as Executive Director in order to move the organization to the next level. With Matt running the day to day operations, Tim was able to shift his focus and develop an outstanding Board of Directors and CLI continued to flourish. In January of 2003, Tim sold his financial services company to devote his energy full-time to CLI as Founder and Chair of the organization. Matt was then elevated by the Board of Directors to President and CEO.

Under Tim’s leadership and the direction of the Board of Directors, CLI expanded its leadership development curriculum. In late 2003, CLI introduced the Pastoral Leadership Institute to priests of the Archdiocese of Philadelphia. The Pastoral Leadership Institute was the forerunner to CLI’s present day *Good Leaders, Good Shepherds* curriculum.

Now in its 28th year of operation, Catholic Leadership Institute has reached national prominence, ministering with priests, diocesan, and lay leaders in over 98 U.S. dioceses.

The two-year ongoing priestly formation curriculum *Good Leaders, Good Shepherds* offered by CLI, combines the science of leadership with the teachings of Jesus Christ and the Catholic Church. Through this process, priests are taught more efficient and effective ways to lead, inspire and motivate their flocks.

In May 2009, CLI launched a parish leadership program for diocesan and parish staff leaders titled, “Tending the Talents,” a complementary curriculum to *Good Leaders, Good Shepherds* that seeks to strengthen the overall quality of ministerial relationships and increase the quality of parish life and leadership. CLI evolved its post-graduate services (officially known as Graduate & Diocesan Services) to support the ongoing application of best practices, continued formation in leadership skills and intentional fraternal support begun in *Good*



*Leaders, Good Shepherds.* These services include *Fraternal Forum*, *Tending the Talents*, and Personal Leadership Coaching, which are offered through a blended learning program of online activities, classroom discussions, and parish application.

With the encouragement of its partner bishops, CLI sponsored an unprecedented ongoing leadership formation for Catholic episcopacy July 2009 at the Cooper Lodge in Dallas, Texas. The session focused on instinctive leadership behaviors, developed values, and versatility as a bishop. The bishops spent time understanding the instinctual behaviors that can help and hurt one in ministry. Since the inaugural session, over 162 arch/bishops have participated in CLI's ongoing leadership formation sessions. Other topics have included the following: *The Power & Grace of Vision*; *Discern, Define and Implement Pastoral Priorities: A Diocesan Roadmap*; and *Effective Media and Communications Strategies*.

In 2011, CLI expanded its services, once again, to include diocesan consulting. In this area, CLI works directly with the bishops and their teams to develop a tailored diocesan strategy.

From the idea of one businessman, Catholic Leadership Institute has grown into the only Christ-centered, Catholic focused leadership training organization in the U.S.

