



PARTNER IN EXCELLENCE APPLICATION FORM (DIOCESE)

Catholic dioceses are encouraged to pledge to commit to the Guiding Principles of the *Standards for Excellence: An Ethics and Accountability Code for Catholic Dioceses* and to work toward implementing the best practices and principles outlined. This code is voluntary, self-regulatory and in conformity with the Code of Canon Law. The Leadership Roundtable on Church Management provides educational resources and training to assist dioceses and parishes to comply with the performance indicators outlined in the *Standards for Excellence* code.

By becoming a Partner in Excellence we are committing our diocese to these Guiding Principles and fundamental values of the *Standards for Excellence: An Ethics and Accountability Code for Catholic Dioceses*.

1. MISSION STATEMENT AND MINISTRY PROGRAM

Dioceses are established to continue the mission of the Catholic Church in particular geographic locations and carry out this mission through specific ministry program activities. Dioceses should have well-defined and locally adapted mission statements, and their ministry programs should effectively and efficiently work toward achieving these mission statements. Dioceses have an obligation to ensure ministry program effectiveness and to devote their resources to achieving its stated purpose.

2. DIOCESAN GOVERNANCE AND ADVISORY BODIES

Dioceses are governed by the bishop who is required by canon law to establish certain advisory councils. The college of consultors, finance council and presbyteral (priests) council are all required by canon law. Canon law further encourages the establishment of a pastoral council. In some matters of major import, the bishop requires the consent of the finance council and the college of consultors. Effective diocesan advisory bodies should serve to further the mission of the diocese, establish management policies and procedures, ensure that adequate human resources (volunteer and/or paid staff) and financial resources (earned income, grants, and charitable contributions) are available, and actively monitor the diocese's financial and programmatic performance.

3. CONFLICT OF INTEREST

Both clergy and laity who serve on diocesan staff, either in paid positions or as volunteers, should act in the best interest of the diocese, rather than in furtherance of personal interests or the interests of third parties. Dioceses should have policies in place, and should routinely and systematically implement those policies, to prevent actual, potential, or perceived conflicts of interest.

4. HUMAN RESOURCES

A diocese's relationship to its ministerial personnel, both clergy and lay, both paid and volunteer, is fundamental to its ability to achieve its mission. The roles and responsibilities for bishops and priests are contained within canon law. Volunteers occupy a special place in dioceses, serving in governance, administrative and programmatic capacities. Diocesan 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.

5. FINANCIAL AND LEGAL

Dioceses must practice sound financial management and comply with a diverse array of legal and regulatory requirements, including those of canon law. Financial systems should assure that accurate financial records are kept and that the organization's financial resources are used in furtherance of its religious mission. Dioceses should conduct periodic reviews to address regulatory and liability concerns.

6. OPENNESS

Although dioceses are private entities, they operate in the name of the Church in service to members and the community at large, with support from the faithful and the general public. As such, all dioceses should provide the faithful and the public with information about their mission, ministry program activities, and finances. A diocese should also be accessible and responsive to members of the faithful and members of the public who express interest in their affairs.

7. FUNDRAISING

Dioceses depend on charitable fundraising for the support of their work. All fundraising activities should be conducted on a foundation of truthfulness and responsible stewardship. Diocesan fundraising policies should be consistent with its mission, compatible with its organizational capacity, respectful of the interests and intentions of donors and prospective donors, and in compliance with applicable canon law.

8. PUBLIC LIFE AND PUBLIC POLICY

Dioceses provide an important vehicle through which individuals may choose to organize and work together to improve their communities. Therefore they should represent Catholic Social Teaching and the interests of the people they serve through public education and public policy advocacy, as well as by encouraging clergy, staff, volunteers and the faithful to participate in the public life of the community.

Please complete this form and email (Standards@nlrcm.org), fax (202-296-9295) or mail it to us (National Leadership Roundtable on Church Management, 1350 Connecticut Ave., NW, Suite 825, Washington, DC 20036)

Name of Diocese _____

Organization E-mail: _____

Organization Website: _____

Address: _____

City, State & Zip: _____

Telephone _____ Fax: _____

Name of Bishop: _____

Individual E-mail: _____

Contact Person for Partner in Excellence (if different): _____

Title _____

Individual Email: _____

Yes, I commit my diocese to the Guiding Principles and fundamental values of the *Standards for Excellence: An Ethics and Accountability Code for Catholic Dioceses*.

Authorized Signature (Bishop): _____

Name: _____ Title: _____

Please check any of the boxes below which apply:

- Yes, please contact us with information about resources and training to assist us in working towards compliance with the *Standards for Excellence*
- Yes, we plan to work with *other dioceses / national organizations / local Colleges/Universities / the Leadership Roundtable / other (Please specify) _____* to work toward implementation of the *Standards*.
- Yes, you can list our organization name in the Partners in Excellence webpage on the Leadership Roundtable's website
- Yes, please add our email to the Leadership Roundtable's private email list to receive updates on Standards for Excellence

There is no fee for becoming a Partner in Excellence. The National Leadership Roundtable on Church Management (NLRCM) accepts donations to further its mission of promoting excellence and best practices in the management, finances and human resource development of the Catholic Church in the United States. NLRCM is incorporated as a 501(c)(3) non-profit organization and contributions are tax deductible. Our federal tax identification number is 54-2174467. Donations can be sent to: National Leadership Roundtable on Church Management, 1350 Connecticut Ave., NW, Suite 825, Washington, DC 20036. Please make checks payable to NLRCM or make your donation online securely by credit card at www.nlrcm.org.