



PARTNER IN EXCELLENCE APPLICATION FORM (NONPROFIT)

Catholic nonprofits are encouraged to pledge to commit to the Guiding Principles of the *Standards for Excellence: An Ethics and Accountability Code for Catholic Nonprofits* 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 Catholic nonprofits to comply with the performance indicators outlined in the *Standards for Excellence* code.

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

1. MISSION STATEMENT AND MINISTRY PROGRAM

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

2. GOVERNING BODY

Effective nonprofit boards of directors should serve to further the mission of the organization, 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 organization's financial and programmatic performance.

3. CONFLICT OF INTEREST

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

4. HUMAN RESOURCES

A Catholic nonprofit's relationship to its 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 Catholic nonprofits, serving in governance, administrative and programmatic capacities. Nonprofit 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

Catholic nonprofits 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 mission. Nonprofits should conduct periodic reviews to address regulatory and liability concerns.

6. OPENNESS

Although Catholic nonprofits 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 Catholic organizations should provide the faithful and the public with information about their mission, program activities, and finances. They should also be accessible and responsive to members of the faithful and members of the general public who express interest in their affairs.

7. FUNDRAISING

Catholic nonprofits depend on charitable fundraising for the support of their work. All fundraising activities should be conducted on a foundation of truthfulness and responsible stewardship. A nonprofit's 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

Catholic nonprofits 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 Organization _____

Name of Diocese: _____

Organization E-mail: _____

Organization Website: _____

Address: _____

City, State & Zip: _____

Telephone _____ Fax: _____

Federal Tax Exempt Number: _____

Name of Chief Executive: _____

Individual E-mail: _____

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

Title _____

Individual Email: _____

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

Authorized Signature (Executive Director): _____

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 national organizations / dioceses / 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.