



## **PARTNER IN EXCELLENCE APPLICATION FORM (PARISH)**

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

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

### **1. MISSION STATEMENT AND MINISTRY PROGRAM**

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

### **2. GOVERNANCE AND ADVISORY BODIES**

The administration of parishes is entrusted to the pastor, appointed by the bishop, who is required by canon law to establish certain advisory councils. A parish finance council is required by canon law. Canon law allows the bishop to mandate the establishment of a parish pastoral council. These councils are governed by norms issued by the bishop. Canon law also places requirements on the financial administration of the parish by the pastor as well as systems of accountability. Effective parish advisory bodies 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 clergy and laity who serve on parish staff, either in paid positions or as volunteers, should act in the best interest of the parish, rather than in furtherance of personal interests or the interests of third parties. Parishes 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 parish's relationship to its ministerial personnel, both clergy and lay, 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 parishes, serving in governance, administrative and programmatic capacities. Parishes' 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**

Parishes 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. Parishes should conduct periodic reviews to address regulatory and liability concerns.

### **6. OPENNESS**

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

### **7. FUNDRAISING**

Parishes depend on charitable fundraising for the support of their work. All fundraising activities should be conducted on a foundation of truthfulness and responsible stewardship. Parish fundraising policies should be consistent with their mission, compatible with their 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**

Parishes 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 Parish \_\_\_\_\_

Name of Diocese: \_\_\_\_\_

Organization E-mail: \_\_\_\_\_

Organization Website: \_\_\_\_\_

Address: \_\_\_\_\_

City, State & Zip: \_\_\_\_\_

Telephone \_\_\_\_\_ Fax: \_\_\_\_\_

Individual E-mail: \_\_\_\_\_

Contact Person for Partner in Excellence (if different): \_\_\_\_\_

Title \_\_\_\_\_

Individual Email: \_\_\_\_\_

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

Authorized Signature (Pastor): \_\_\_\_\_

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 parishes / 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](http://www.nlrcm.org).