



# HARDENING THE TARGET

*Four Opportunities to Strengthen  
Your Lay Apostolate*

SELF-  
ASSESSMENT



## RELIGIOUS IDENTITY

Examples of Questions to Consider:

- Does our purpose statement clearly describe our religious identity?
- If appropriate, is our organization formed as a religious corporation?
- Do our articles of organization express our religious identity?
- Do our bylaws include a definition of “practicing Catholic” or other faith commitment for staff and leadership?
- Does our marketing material identify our religious mission?
- Do we include prayer in our daily activities and schedules?
- Have we considered adopting a theme verse to help our team keep perspective?



## RESOURCES

[“Why a Religious Corporation?”](#) Whitepaper  
[“Perspective: What's Your Theme Verse?”](#) Blog Post  
[“Keeping the Faith During A Time of Crisis”](#) Blog Post  
[“Ministerial Exception”](#) Whitepaper

*Other Recommended Resources:*

Alliance Defending Freedom [“Protecting Your Ministry”](#) Guide



# CORPORATE GOVERNANCE

Examples of Questions to Consider:

- Does our board meet consistently and at least once annually?
- Do we provide proper notice of board meetings?
- Do we keep board meeting minutes, obtain proper board approval of the minutes, and include signed copies in our corporate records?
- Has the board adopted appropriate policies, such as a conflict of interest policy, a compensation policy, a document retention policy, and a whistleblower policy?
- Have we identified our annual local, state, and federal filing obligations?
- Do we have a compliance calendar?
- Are our corporate records complete, easily accessible, and organized?
- Have we evaluated insurance options and obtained appropriate coverage?
- Do we maintain appropriate financial records?
- If we received a Paycheck Protection Program loan, are we in compliance with applicable regulations?



## RESOURCES

[“Steps to Success for Catholic Apostolates” Webinar](#)

[“Excess Benefit Transactions” Whitepaper](#)

[“Paycheck Protection Program Loans Frequently Asked Questions”](#)

*Blog Posts on Corporate Governance:*

[“Nonprofit Spring Cleaning: Corporate Records”](#)

[“Creating a Compliance Calendar”](#)

[“Taking Board Action Without A Meeting”](#)

[“Duty: Engaging Your Board During a Crisis”](#)

[“Stewardship: Protecting Your Faith-Based Organization During a Crisis”](#)

[“Three Observations from Recent Media Coverage of Liberty University”](#)

# RELIGIOUS LIBERTY & EMPLOYMENT PRACTICES

## Examples of Questions to Consider:

- Have we identified applicable religious exemptions and documented the basis for our eligibility?
- Do our job descriptions appropriately and expressly define the connection between each role and the religious mission of our organization?
- Does our employment handbook express to our staff the organization's religious commitment and identity?
- Do our employment agreements indicate our religious identity and clearly communication expectations for our staff?
- To avoid misunderstandings, when appropriate, do employment documents communicate to job applicants and staff that the organization may be exempt from certain employment laws and regulations?
- When appropriate, do our performance evaluations include assessments related to Catholic witness and education in the faith?
- Does our organization have a healthcare plan which is consistent with Catholic teaching?



## RESOURCES

[“Ministerial Exception”](#) Whitepaper

[“Consider Mediation”](#) Whitepaper

[“Making a Christ-Centered Health Care Decision”](#) Whitepaper

[“Compassion: Protecting Employee Health During A Crisis”](#) Whitepaper

[“Employment Practices Audit”](#) Whitepaper

[“Religious Liberty and Employment Frequently Asked Questions”](#)



## THINKING CREATIVELY ABOUT THE MISSION

Examples of Questions to Consider:

- Has our leadership considered our organization's strengths and weaknesses in responding to changes in the economy and ways of doing business?
- Have we looked for opportunities to support and collaborate with other lay apostolates?
- Do we have a plan to meet our financial and/or administrative needs in the coming months?
- Are we communicating and engaging with our donors?
- Have we evaluated our fundraising practices and identified opportunities for improvement?



## RESOURCES

["Achieving Fundraising Success"](#) Whitepaper

["Reopening Resource"](#)

["CARES Act § 2205: Another Incentive for Charitable Donations"](#) Blog Post

["Leadership: Leading Your Faith-Based Organization Through A Crisis"](#) Blog Post





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