



Association of
Philanthropic
Counsel

America's Trusted Counsel

Experience. Integrity. Solutions.

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APC CODE OF ETHICS, STANDARDS OF PROFESSIONAL PRACTICE AND PERFORMANCE EXPECTATIONS

CODE OF ETHICS

Members of the APC pledge to:

- Uphold the Donor Bill of Rights.
- Accurately represent their professional expertise and experience.
- Base fees on the value of their professional expertise and experience; mutually agree with clients on fees in advance of engagements; and not accept compensation based on a percentage of charitable contributions.
- Maintain confidentiality of all privileged information.
- Refrain from guaranteeing financial fundraising results.
- Disclose real and perceived conflicts of interest.

STANDARDS OF PROFESSIONAL PRACTICE

To serve clients and the fundraising profession, APC Members promise to:

- Promote the spirit of philanthropy.
- Serve only institutions whose missions they support.
- Assist clients in making decisions that advance their missions and strengthen their organizations.
- Support volunteers and staff in fulfilling their roles as fundraisers and refuse to serve as paid solicitors.
- Avoid receiving and processing charitable gifts on behalf of clients.
- Place control of fundraising expenses with clients.
- Refrain from charging a fee for initial meetings with prospective clients interested in engaging our services.
- Continually update their professional knowledge.
- Advocate legislation and regulations promoting philanthropy.
- Adhere to all laws and regulations governing the profession.

PERFORMANCE EXPECTATIONS

Promote Client-Centered Communications

- Provide clarity on scope of engagement and deliverables
- Learn and comprehend cultural and technical environment of client
- Initiate, listen and respond to ideas that foster and achieve organizational goals
- Establish expectations clarifying delivery of services
- Keep client focused on results

- Celebrate small steps and benchmarks as well as ultimate success
- Support appropriate risk taking

- client culture and needs
- Strive to exceed client expectations

Practice and Foster Creative Solutions

- Develop customized, holistic approaches to client needs
- Encourage open learning environment
- Foster acceptance of new approaches to organizational opportunities

Commit to Professional Development

- Educate client and self on best practices in philanthropy
- Demonstrate professional development in the delivery of quality services
- Advance professionalism through volunteerism and advocacy

Establish Roles and Define Relationships

- Maintain appropriate, objective and supportive relationships with all staff
- Establish a system for delivery and receipt of work due
- Create an environment in which it is "safe" to disagree
- Demystify the consulting process

Focus on Results

- Develop comprehensive plan related to initial assessment and client resources
- Establish agreement on expectations and measurable results
- Assign tasks focused on priorities and timelines
- Monitor progress and adjust plans as appropriate

Demonstrate Honesty and Integrity

- Disseminate to all clients:
 - APC Code of Ethics, Standards of Professional Practice and Performance Expectations
 - AFP Code of Ethical Principles and Standards of Professional Practice
 - Donor Bill of Rights
- Guide the setting and achieving of realistic client goals
- Promote appropriate, strategic solutions
- Maintain professional conduct
- Guard client confidentiality

Establish Mutually Supporting Relationships

- Maintain sense of humor and sensitivity to styles
- Support success and address problems together
- Encourage and recognize team contributions to success
- Include teaching, coaching and mentoring in consultancy
- Transfer knowledge and experience to staff and volunteers

Demonstrate Professionalism

- Be available, responsive, reliable and timely
- Model ethical and professional standards; Engage client in achieving the same
- Exhibit commitment to client goals
- Articulate possible conflict of interest when referring support services, contractors and/or extension or renewal of contract
- Demonstrate flexibility and respect in adapting to