

# APC

Association of  
Philanthropic  
Counsel

America's Trusted Counsel

Experience.  
Integrity.  
Solutions.

[www.apcinc.org](http://www.apcinc.org)

## VISION STATEMENT

**APC is the preeminent network of philanthropic counsel.**

Our members:

- Maximize their effectiveness through shared knowledge,
- Define evolving best practice for the profession,
- Influence change in the sector,
- Empower nonprofits as agents for change, and
- Nurture responsive philanthropy.

## CODE OF ETHICS

**As a member of the Association of Philanthropic Counsel, members pledge to:**

- Uphold the Donor Bill of Rights.
- Accurately represent our professional expertise and experience.
- Base fees on the value of our 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.
- Refrain from guaranteeing financial fundraising results.
- Maintain the confidentiality of all privileged information.
- Disclose real and perceived conflicts of interest.

## STANDARDS OF PROFESSIONAL PRACTICE

**To best serve clients and the fundraising profession, we further promise to:**

- Promote the spirit of philanthropy.
- Serve only institutions whose missions we 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 our 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 the cultural and technical environment of client
- Initiate, listen and respond fostering achievement of organizational goals
- Establish expectations clarifying delivery of services
- Keep client focused on results

### 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

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

### Practice and Foster Creative Solutions

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

### Focus on Results

- Develop a comprehensive plan related to the 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 Professionalism

- Be available, responsive, reliable and timely
- Model ethical and professional standards; Engage client in achieving the same
- 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 client culture and needs
- Strive to exceed client expectations

### 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

### Demonstrate Honesty and Integrity

- Disseminate to all clients:
  - APC Code of Ethics and Standards of Professional Practice
  - Association of Fundraising Professionals 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



Association of Philanthropic Counsel

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