

# Key Updates to the Code of Ethics: What They Mean for You

AFP Ethics Webinar

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# Today's Presenters

- ▶ John Scola, CFRE CAP®
  - ▶ AFP AZ, Greater Arizona Chapter
- ▶ Joyce Mitchell-Antoine, CFRE
  - ▶ AFP NC, Triangle North Carolina Chapter
- ▶ Robbe Healey, MBA, ACFRE, FAFP
  - ▶ AFP PA, Greater Philadelphia Chapter
- ▶ Andrea McManus
  - ▶ AFP AB, Calgary & Area Chapter

# Topics for Today

- ▶ **Welcome.**
  - ▶ John Scola
- ▶ **Why Revise the Code?**
  - ▶ Joyce Mitchell-Antoine
- ▶ **Changes to the Code and Resources.**
  - ▶ Robbe Healey & Andrea McManus
- ▶ **Q & A.**
  - ▶ Everyone!

*Please access the additional materials provided ... they will enhance your understanding of the session and discussion!*

# The AFP Code of Ethics is . . .

1. Duties of fundraisers to the organizations and communities they serve and to the donors who support those missions.
2. Duties of fundraisers in relation to others in the profession and to the wider public.
3. Guide to practicing fundraising professionals and Business members as they support fundraising practices.
4. AFP's Code of Ethics is a living document and baseline that provides structure, guidance and support – for all of these.

# Initial review focused on:

- ▶ Are the categories/groupings relevant and relatable?
- ▶ Are the standards in each section in the appropriate category/grouping?
- ▶ What is missing?
- ▶ What needs to be retired?
- ▶ What needs to be reinterpreted?
- ▶ Is the language appropriate and understandable across our diverse constituency including but not limited to considerations such as: age, culture, ethnicity, gender, sexual orientation, sector, etc.?

# Missing from the 2014 Code:

- ▶ Vision: Our “Vision of Fundraising as an Ethical Profession.”
- ▶ Preamble: the “why” to support the “what” - our rules.
- ▶ Member-to-Member Behavior:
  - ▶ Clear statement of how we treat each other as ethical professionals.
  - ▶ We agreed this is very important – but it goes beyond ethics and is in the AFP Member Code of Conduct



# AFP Code of Ethical Standards

To be used in its entirety... not abridged.

- ▶ Introduction
- ▶ Ethical Principles
- ▶ Standards of Practice
  - ▶ Public Trust And Transparency
  - ▶ Conflicts Of Interest
  - ▶ Solicitation & Stewardship Of Philanthropic Funds
  - ▶ Donor Privacy, Treatment Of Confidential & Proprietary Information
  - ▶ Fair, Equitable, And Transparent Compensation Practices

## Definitions:

To ensure a common understanding of the use of each term:

- Client
- Conflict of Interest
- Donor
- Fiduciary
- Member
- Organization
- Stewardship

*Please access the Code in the additional materials provided.*

# In addition to the Code there are:

Interpretive Guidelines, with examples

Case Scenarios

Training Materials for Chapters



# Interpretive Guidelines

- ▶ In addition to guidelines for each of the 25 Standards, there are:
  - ▶ Examples of Ethical Practice
  - ▶ Examples of Unethical Practice

*Please access these in the additional materials provided.*

## Standard 1: Guidelines

Not engage in activities that harm the members' organizations, clients, or profession or knowingly brings the profession into disrepute.

- a. Members support and advocate for the mission and goals of their organization.
- b. Members conduct their personal and professional lives recognizing that their actions may be interpreted as representing the organization by which they are employed.
- c. Members respect the wishes and needs of constituents, and do nothing that would negatively impact their social, professional, or economic well-being.
- d. As a best practice, members should state to donors, clients, their organization, and other constituents, that they are bound by the *AFP Code of Ethics*.

# Standard 1: Examples of Ethical Practice

1. Decline to participate in activities contrary to the organization's mission and goals.
2. Provide accurate and complete information to constituents regarding projects, programs, or other activities that they might support or endorse.
3. Maintain one's education in philanthropy and fundraising best practices to convey appropriate advice to constituents, the community, and the public.
4. Members with supervisory responsibilities provide education in philanthropy and fundraising best practices for subordinate staff as appropriate.

# Standard 1: Examples of Unethical Practice

1. Convey false or exaggerated information.
2. Neglect to complete a transaction involving a contribution or pledge as promised.
3. Ignore unethical practices or illegal behavior of others and not report same to organizational leadership or appropriate authorities (e.g., legal, AFP, etc.).
4. Make public comments that are derogatory about leadership or organizational activities.

# Part 2: Case Studies:

Drafted to inspire and guide discussion

*Please access these in the additional materials provided.*

## The Ethical Dilemma.

✦ Who's directly involved?

✦ What are the possible ethical issues; who else might be impacted?

✦ What are some possible considerations?

✦ Steps can you take and potential solutions.

✦ What are the likely outcomes if nothing changes?

✦ What could have made the outcome(s) more ethical?

✦ Related Ethics Standards

