



Member Welcome Package

The Association of Fundraising Professionals empowers individuals and organizations to practice ethical fundraising through professional education, networking, research and advocacy.

ASSOCIATION OF FUNDRAISING PROFESSIONALS CALGARY & AREA CHAPTER

MAILING: P.O. Box 46052 Inglewood Calgary, AB T2G 5H7



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ABOUT AFP

The Association of Fundraising Professionals (AFP) is the professional association of individuals and organizations that generate philanthropic support for a wide variety of charitable institutions. Founded in 1960, AFP advances philanthropy through its 33,000 members in more than 241 chapters throughout the world. AFP has inspired global change and supported efforts that have generated over \$1 trillion. AFP's individual and organizational members raise over \$115 billion annually, equivalent to one-third of all charitable giving in North America, and millions more around the world. Discover AFP services and how AFP promotes stewardship, donor trust and ethical fundraising by reading the <u>AFP Fact Sheet.</u> To learn more, please visit <u>afpglobal.org</u>.

AFP Canada

AFP Canada is our voice - the national voice for our fundraising profession. Their role is to ensure that its over 3000 members' values and priorities are heard on the national and international stage. To learn more about AFP Canada please visit <u>https://afpglobal.org/afp-canada</u>.

AFP Foundation for Philanthropy – Canada

As the philanthropic arm of AFP, the AFP Foundation for Philanthropy—Canada supports many programs and services through its highly successful Annual Fund, especially the Every Member Campaign, and other fundraising vehicles including Major Gifts, Planned Gifts and Endowments. To learn more please visit <u>https://afpglobal.org/afp-foundation-philanthropy-canada</u>.

AFP Calgary & Are Chapter

The AFP Calgary & Area Chapter was formed in 1994. Its membership consists of some 300 members representing diverse organizations of varying sizes and sectors: arts and culture to education to healthcare to social services. We are committed to excellence in providing the highest quality services and products for our members and other constituents. AFP is responsive to member needs and strives to exceed expectations. Here are just a few things that makes us proud of being members of one of the most innovative AFP chapters:

- 10 Star Chapter recognition 2008 to 2020 (for chapters who have accomplished all key objectives in AFP International strategic plan)
- Friends of Diversity Designation consecutively since the inception of the award
- Representation on AFP Canada Board and AFP Foundation for Philanthropy Canada
- Education programs are strong and well attended
- Numerous members volunteer on national and international AFP committees
- Banff Compass has been drawing consistent attendees for 10 years since its inception

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AFP CALGARY & AREA CHAPTER LEADERSHIP

President				
Marni Halwas				

President-Elect

Past-President Lorie Abernethy

Treasurer Ron Smith

Secretary John Dumonceaux

Professional Development & Advancement Derek Bechthold

IDEA (Inclusion, Diversity, Equity & Access) Jason Lyver

Government Relations Bryan Goehringer **Communications** Nancy Scott

National Philanthropy Day/Week Amtul Siddiqui

Membership and Chapter Services Adriana Simon

Banff Compass 2021

Every Member Campaign Lorie Abernethy

Member at Large: Sarah Hughes

<u>Visit the AFP Calgary website</u> to learn more about our Chapter Leadership and how you can volunteer.

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FAQS ABOUT AFP MEMBERSHIP

Have questions about your AFP membership? The FAQs below should answer them. If you have questions, please contact the Member/Chapter Services Department at AFP International Headquarters, (800) 666-3863 or send an email to mbrship@afpglobal.com.

How long does my membership last?

Your membership lasts 12 months, starting in the month you officially become a member.

Does my membership belong to me, or to the organization I work for?

It depends on the type of membership that you join. If you are a Professional, Young Professional, Global eMember, Collegiate or Associate member, the membership is yours and goes with you if leave or change organizations.

The Nonprofit Organizational Membership for both large and small organizations, and the Executive Circle Business Member or Endorser Business Member belongs to the organization or company. If an employee leaves, the organization may replace the name of the designated member. New members still need to fill out a membership application and sign their adherence to the AFP <u>Code of Ethical Principles and Standards</u>.

Does my membership stay with me if I switch organizations?

If you are in one of the individual membership categories the membership goes with you if you switch organizations. Make sure you update your membership profile with your new contact information.

How do I manage my membership?

Visit <u>www.afpcalgary.com</u>, click on afpglobal.com on the upper right hand side then click on SIGN IN . When you first join AFP, you are sent an email with your membership number (username) and password to login. There is a "Forgot password" link if you cannot remember your password. You need to have access to the email address you joined AFP with; if you change organizations make sure you update your email address before you leave your organization.

Once you are signed in, you can manage all aspects of your membership, from updating your home and work address, your email and phone numbers, your communication preferences and your listing in the member directory. As well, you can view your previous transactions under Orders & Donations and clicking on Transaction History. You can reprint your membership receipt from here. Or you can view previous donations or make a donation to the FP Canada Foundation for Philanthropy.

It is good to periodically review and update your member profile with AFP Global to ensure your information is current.

How do I ensure my contact information is available for other members to find me in the Online Directory?

Once you are logged in (see above), click the "Edit" link next to "Main Address". Under Zip/ Postal Code, you will see two checkboxes. To ensure your name appears in all AFP-related directories, check the box next to "Include in Web/Mobile Directory" and "Include in Print Directory". Once checked, click Save.

Remember: You cam also update any additional information at this time - simply select the appropriate menu item to update from the left-side menu!

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BENEFITS TO AFP MEMBERS

Below are the major benefits you receive when you join AFP.

- Members can take advantage of educational opportunities with the AFP Calgary chapter. Local chapters are the heart of AFP networking and mentoring.
- Members can post jobs at a discounted rate on the <u>AFP Calgary job board</u>. Or visit the <u>AFP</u> <u>Career Center</u> and upload your resume to help build and further your career. You can also find or become a <u>mentor</u>.
- <u>AAUW Online Negotiation Work-shops</u> and <u>AFP360°</u>. AFP has partnered with the American Association of University Women (AAUW) to provide all members a free one-hour online negotiation workshop. In addition, AFP has launched with Korn Ferry the new AFP360°, our free online career builder and management tool!
- <u>AFP's professional advancement programs and</u> <u>courses</u> give every professional, no matter what level of experience they have, the opportunity to enrich their skills and add to their knowledge base. We offer <u>Blackbaud</u> <u>University to AFP Members for free.</u> Whether you're a new fundraiser or need a refresh of basic fundraising and nonprofit skills, get free guidance with Blackbaud University.
- Members receive a discount to attend the <u>AFP</u> <u>ICON</u> held each spring which brings more than 3,000 fundraising professionals together and offers more than 100 educational sessions.

- To help train you and your staff, members have access to the AFP Online Knowledge Center. You can register for upcoming webinars, Micro-Learning videos, AFP Fundamentals of Fundraising eLearning courses and along with other courses at a discounted member rate. Free webinars are available to members from time to time as well.
- Innovative ideas can be found in <u>Advancing</u> <u>Philanthropy</u> which is free to AFP members as well as our members only newsletter AFP Daily.
- AFP Members receive an exclusive discount to <u>Giving USA 2019: The Annual Report on</u> <u>Philanthropy</u>, including print and digital, data tables, and a full PowerPoint you can use to share and explain the data trends with your fundraising staff and board of directors.
- Get the latest trends and analysis at <u>The AFP</u> <u>Blog</u>. Plug in to AFP on <u>LinkedIn</u>, <u>Facebook</u>, <u>Twitter</u>, <u>YouTube</u>, <u>Instagram</u> and benefit from the expertise of others in <u>AFP</u> <u>Connect</u>.
- The <u>AFP Ready Reference</u> series is free in PDF format to members.
- Free access to AFP's latest <u>research and</u> <u>reports here</u> including the <u>AFP Compensation</u> <u>and Benefits Report</u> where you can find benchmarking on fundraisers' salaries, benefits and other compensation—how does your position and location compare to the national average?

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VOLUNTEER OPPORTUNITIES

Thank you for your interest in volunteering with your colleagues in Calgary and area through the Association of Fundraising Professionals. We welcome your involvement!

Volunteering is an excellent way to enhance your skills, gain leadership experience, forge strong relationships with fundraising colleagues, and actively support the charitable sector in Calgary and area.

There are many opportunities based on your areas of interest and available time commitment.

- Event Assistance one-time (day of event, several hours)
- Event Leadership** multi-month, committee /area chair, planning plus event day
- Annual Leadership^{**} board position or committee role and general AFP requirements (monthly meetings plus 5 hours / month time commitment to area work)
- Annual Committee year long project/event-based work, 5-10 hours per month for 3 or 6 or 10 months

**These roles require you to be a member of AFP Calgary.

Volunteer opportunities exist within each committee (each committee is chaired by a member of the Board):

- Banff Compass/ Calgary Compass
- Community Partnerships & Engagement
- Diversity and Inclusion
- Every Member Campaign
- Marketing & Communications
- Philanthropy Awareness Week
 - Generosity of Spirit [™] Awards
 - National Philanthropy Day®
 - Professionals' Forum
 - Professional Awards Luncheon
 - Youth Forum
- Youth In Philanthropy

USE THIS FORM TO SUBMIT YOUR INTEREST AND AVAILABILITY

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PROFESSIONAL DEVELOPMENT

AFP Calgary & Area Chapter believes that professional development is one of the key benefits of AFP membership. Members enjoy a wide-range of programs and opportunities including online learning resources, annual Mentorship Program, scholarships and bursaries, accreditation support, resources for students and Young Professionals, and volunteer opportunities.

No matter where you are in your experience, our breakfast sessions and workshops are geared for all levels of experience in the not-for-profit sector. We also have in-class offerings of the CFRE review course and the Fundamentals of Fundraising course.

Program	Member Rate**	Non-Member Rate**
AFP Webinar	\$15	\$25
AFP Socials	\$15	\$20
AFP Breakfast/Luncheon	\$25	\$35
AFP AGM Luncheon	\$45	\$60
AFP Courses (i.e. Fundamental of Fundraising and CFRE Refresher courses)	\$495	\$595

ACCREDITATION

<u>CFRE International</u> offers the only internationally-recognized baseline professional credential for philanthropic fundraising executives. Based on current and valid practice-based standards, the CFRE designation is a personal and professional achievement that sets standards in philanthropy.

AFP Calgary luncheons and webinars often provide one CFRE educational credit per hour of learning.

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MENTORSHIP PROGRAM

OVERVIEW

The Mentorship Program is designed to match a relatively junior fundraiser with someone in the industry who has more experience in an area or areas they would like to learn more about. For the mentee, it provides an informal career pathway that addresses the pragmatic side of fundraising, rather than the more formal educational side that the CFRE course of study entails. It is designed for those who wish to acquire a particular expertise, learn about the culture of a different sector, or learn how a skilled professional operates. The mentors enjoy a one-on-one relationship that is professionally relevant and meaningful.

It is a collegial and non-judgmental opportunity for our pairs to advance their knowledge and understanding of the philanthropic sector. An added bonus for all participants is the relationships they will have within the wider mentorship program. They will be members of an elite group of people who are actively moving forward in the sector – people who can be called on at any time as a peer.

WHO SHOULD APPLY

Mentees must be a current AFP Calgary member to apply. We are looking for mentors who have knowledge and experience and who would like to "give back" to their profession. Mentee candidates must be currently employed as fundraising professionals and must demonstrate, in their applications, their firm commitment to the profession and to learning. Spaces are limited and the program is open to enthusiastic, dedicated fundraisers who are passionate about learning best practices in the field.

THE EXPECTATIONS

Pairs are expected to meet regularly and have one face-to-face meeting each month. It is important for the mentee to ensure that meetings are scheduled and located at the convenience of the mentor and that agendas are prepared and circulated beforehand. This will enable the mentor to properly prepare for the meeting.

INTAKE AND APPLICATION FORMS

Mentor Application Mentee Application

AFP ONLINE MENTORING PROGRAM

Welcome to the *new* AFP Online Mentoring Program. This program has been designed for members who are seeking short-term advice on a fundraising topic, such as how to start a simple bequest program, or what would be the best career move after being an annual fund director. This program will help you find an experienced member of AFP with the expertise you need. The program is not intended to provide free consulting services, but rather a way to have questions answered by a member who knows about the topic and is willing to help provide you with suggestions. <u>Visit this page for more information</u>

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The whole purpose of education is to turn mirrors into windows. ~ Sydney J. Harris

The Association of Fundraising Professionals (AFP) Calgary & Area hosts Banff Compass every two years. Banff Compass is the evolution of a highly successful bi-annual conference held in Alberta since 1992. Delegates from across Western Canada will gather to take advantage of the outstanding learning opportunities for both senior professionals and those new to the profession.

Professional fundraisers, executive directors, board members and volunteers who are directly or indirectly engaged in fundraising activities attend, making Banff Compass a significant and not-to-miss fundraising conference.

Banff Compass Fundraising Conference is a 3.5 day conference providing internationally renowned keynote speakers, exceptional learning opportunities in several professional development tracts, networking and social activities. Over 100 new and experienced fundraising professionals attend this event at Banff Centre for the Arts every two years. For fundraisers pursuing or renewing their CFRE accreditation. Banff Compass provides an excellent opportunity to obtain up to 16 CFRE educational credits.



Calgary Compass

Disruptive Philanthropy in a changing world



Calgary Compass is a bi-annual one day workshop designed to provide affordable professional development for members of AFP Calgary and Area chapter, along with other stakeholders within the not-for-profit sector. This one day conference will bring together nationally and internationally acclaimed leaders in the field of philanthropy, corporate and community engagement, and economic development. At this session, participants will explore and develop some new ways of working and collaborating in our disruptive, ever-changing world of community building. (And we'll serve lunch). This conference promises to push boundaries, inspire discussion, and create new opportunities for collaboration to grow both the for-profit, and not-for-profit sectors.

<u>Watch the AFP Calgary website</u> or <u>sign up for our emails</u> to learn about the next Banff Compass or Calgary Compass Fundraising conference.

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IDEA

FUNDRAISERS IMPACT PEOPLE'S LIVES DAILY. THE IDEA IMPACT PROGRAM SEEKS TO POSITIVELY IMPACT THE DAILY LIVES OF FUNDRAISERS.

AFP is committed to the principles of inclusion, diversity, equity and access (IDEA) in the fundraising profession, the philanthropic sector and throughout all of society. AFP is involved in numerous projects and partnerships related to IDEA.

One Program, Many Initiatives

The AFP Global IDEA Impact program will use a phased, multiyear approach to create initiatives focused on different diverse communities. Each initiative will have four components; research, education and training, support, and awareness geared towards effectively preparing the next generation of diverse fundraisers to lead the profession. The program and its initiatives will work to create a fundraising profession that is not only diverse, but inclusive and equitable.

The first initiative is the Women's Impact Initiative. The Women's Impact Initiative (WII) addresses and highlights specific issues and challenges that women in the fundraising profession face. <u>More information</u>.

IDEA IN AFP CALGARY

Through the IDEA Committee, the AFP Calgary & Area Chapter is committed to:

- implementing programs and advocating for practices that assure inclusion in our membership, leadership and services that helps to identify and meet the needs of diverse members;
- serving as a resource to the Board, Committees and Membership on diversity and inclusion;
- finding ways to assess the level of inclusion and accessibility to promote opportunities for participation and leadership;
- ensuring that AFP Calgary & Area Chapter is aware of and welcoming to a broad diversity of backgrounds and perspectives in our region and open to inviting these attributes to become an integral part of all of the Chapter's actions and activities;
- researching, strategizing and advising the chapter on issues and aspects related to Diversity and Inclusion in our community that impact the AFP Calgary & Area Chapter.

To volunteer with the IDEA committee, please contact the IDEA Chair through the AFP Office at info@afpcalgary.com

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WITH A GIVING HEART

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CHANGE THE WORLD

National Philanthropy Day[®]

National Philanthropy Day is celebrated across the world each November to commend and highlight the accomplishments of individuals and groups who make a difference in their communities.

The Association of Fundraising Professionals (AFP) Calgary & Area Chapter is proud to present the Annual National Philanthropy Day® Generosity of Spirit[™] Awards being celebrated in Calgary every November.

Each year, we honour philanthropists in the following categories for their gifts of time, talent, treasure and energy to make our communities, and our world, better. These individuals and groups take small and large steps, every day, to make changes that improve the world for the people and agencies they support in numerous ways. The ripples that their efforts make have a massive impact.



- Doc Seaman Individual Philanthropist Award presented by The Calgary Foundation
- Outstanding Philanthropic Family
- Outstanding Youth Philanthropist
- Outstanding Group Philanthropist
- Outstanding Corporate Philanthropist
- Outstanding Philanthropist: Lifetime Achievement

In addition, we are proud to honour professionals who work in the fields of fundraising and community investment, helping support the work of non-profit organizations.

- Outstanding New Fundraising Professional
- Outstanding Fundraising Professional
- Hazel Gillespie Community Investment Leadership Award

Learn more:

National Philanthropy Day Generosity of Spirit [™]Awards Outstanding Fundraising Professional Awards Hazel Gillespie Community Investment Leadership Award

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EVERY MEMBER CAMPAIGN

The Every Member Campaign allows the AFP Foundation for Philanthropy – Canada to create sector advocates through education, build philanthropic leaders through scholarships, strengthen the sector through career mentoring, foster understanding through research and ensure materials are available to our members in both official languages.

Funds raised through the Every Member Campaign support AFP Calgary chapter scholarships and educational opportunities. Your donation makes a difference right here in our chapter!

We are committed to advancing philanthropy in Canada and continue to succeed because AFP members just like you participate in the Every Member Campaign (EMC).

Please count yourself in - simply click on your Chapter from the list provided and make your donation today <u>or click here to make a specific donation</u> to the AFP Foundation for Philanthropy – Canada.

Last year we raised over \$122,000 with the support of 781 donors nationwide.

Thank you in advance for your participation and strengthening our profession and the communities we serve.

Additional Resources: <u>EMC Website</u>

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SCHOLARSHIPS

The Calgary & Area Chapter of AFP increases accessibility to educational programs by offering financial reimbursement to individuals (members and non-members), to attend educational sessions and conferences relevant to fundraisers and offered locally, nationally and internationally.

The Calgary & Area Chapter has designated funds raised from Philanthropy Day each year to be set aside for the Education Fund. This fund will be used to award financial reimbursement for AFP members to support them in professional development opportunities.

CHAMBERLAIN SCHOLARSHIP

First Time AFP International Conference Attendee

This scholarship is provided by AFP International to each of the AFP Chapters in order to send a fundraising professional to their first AFP International Conference. Each chapter accepts applications and is responsible for choosing a suitable applicant to receive the scholarship. This scholarship covers the registration fee. AFP Calgary also provides an additional scholarship to help cover travel expenses.

THE JOAN BLACK SCHOLARSHIP

First Time AFP International Conference Senior Professional Attendee This scholarship is provided by AFP Calgary & Area chapter to send a senior professional to their first AFP International Conference. This scholarship is intended help cover travel expenses.

CONFERENCE SCHOLARSHIPS

First Time Conference Attendee

We also do our best to help our members attend our conferences by offering scholarships to those who plan to attend either of our Calgary and/or Banff Compass conferences for the first time.

Click here for more information.

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A DONOR BILL OF RIGHTS

DEVELOPED BY:



Association of Fundraising Professionals (AFP)



Association for Healthcare Philanthropy (AHP)



Council for Advancement and Support of Education (CASE)



Giving Institute: Leading Consultants to Non-Profits

PHILANTHROPY is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.

To have access to the organization's most recent financial statements.

IV

To be assured their gifts will be used for the purposes for which they were given.

V

To receive appropriate acknowledgement and recognition.

VI

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

VI

To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII

To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX

To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

X

To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.



CODE OF ETHICAL STANDARDS

ETHICAL STANDARDS (Adopted 1964; amended Oct 2014)

The Association of Fundraising Professionals believes that ethical behavior fosters the development and growth of fundraising professionals and the fundraising profession and enhances philanthropy and volunteerism. AFP Members recognize their responsibility to ethically generate or support ethical generation of philanthropic support. Violation of the standards may subject the member to disciplinary sanctions as provided in the AFP Ethics Enforcement Procedures. AFP members, both individual and business, agree to abide (and ensure, to the best of their ability, that all members of their staff abide) by the AFP standards.

PUBLIC TRUST, TRANSPARENCY & CONFLICTS OF INTEREST

Members shall:

- not engage in activities that harm the members' organizations, clients or profession or knowingly bring the profession into disrepute.
- 2 not engage in activities that conflict with their fiduciary, ethical and legal obligations to their organizations, clients or profession.
- effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
- 4 not exploit any relationship with a donor, prospect, volunteer, client or employee for the benefit of the members or the members' organizations.
- 5 comply with all applicable local, state, provincial and federal civil and criminal laws.
- 6 recognize their individual boundaries of professional competence.
- present and supply products and/or services honestly and without misrepresentation.
- 8 establish the nature and purpose of any contractual relationship at the outset and be responsive and available to parties before, during and after any sale of materials and/or services.
- never knowingly infringe the intellectual property rights of other parties.
- protect the confidentiality of all privileged information relating to the provider/client relationships.
- never disparage competitors untruthfully.

SOLICITATION & STEWARDSHIP OF PHILANTHROPIC FUNDS

Members shall:

- ensure that all solicitation and communication materials are accurate and correctly reflect their organization's mission and use of solicited funds.
- ensure that donors receive informed, accurate and ethical advice about the value and tax implications of contributions.

- ensure that contributions are used in accordance with donors' intentions.
- ensure proper stewardship of all revenue sources, including timely reports on the use and management of such funds.
- obtain explicit consent by donors before altering the conditions of financial transactions.

TREATMENT OF CONFIDENTIAL & PROPRIETARY INFORMATION

Members shall:

- not disclose privileged or confidential information to unauthorized parties.
- adhere to the principle that all donor and prospect information created by, or on behalf of, an organization or a client is the property of that organization or client.
- give donors and clients the opportunity to have their names removed from lists that are sold to, rented to or exchanged with other organizations.
- when stating fundraising results, use accurate and consistent accounting methods that conform to the relevant guidelines adopted by the appropriate authority.

COMPENSATION, BONUSES & FINDER'S FEES

Members shall:

- not accept compensation or enter into a contract that is based on a percentage of contributions; nor shall members accept finder's fees or contingent fees.
- 22 be permitted to accept performance-based compensation, such as bonuses, only if such bonuses are in accord with prevailing practices within the members' own organizations and are not based on a percentage of contributions.
- neither offer nor accept payments or special considerations for the purpose of influencing the selection of products or services.
- 20 not pay finder's fees, commissions or percentage compensation based on contributions.
- meet the legal requirements for the disbursement of funds if they receive funds on behalf of a donor or client.

VALUES PROMOTED BY THE AFP CODE OF ETHICS

The Association of Fundraising Professionals (AFP) serves the public trust by promoting ethical and effective fundraising. AFP members are guided in their ethical decisionmaking by the AFP Code of Ethical Principles and Standards, which is grounded in a set of values that fundraisers aspire to honor in their lives and work. When these values are evident in our fundraising practice, we believe that our work leads to integrity in our personal, professional, organizational and public lives.

An ethical fundraiser aspires to:

* Observe and adhere to the AFP Code and all relevant laws and regulations;

* Build personal confidence and public support by being **trustworthy** in all circumstances;

* Practice honesty in relationships;

* Be **accountable** for professional, organizational and public behavior;

* Be transparent and forthcoming in all dealings; and,

* Be **<u>courageous</u>** in serving the public trust.

We strive to live out these values, which are at the heart of our public character as philanthropic fundraisers, and to grow in our ethical understanding and practice.



ADOPTED BY THE AFP ETHICS COMMITTEE, 9/7/12