



PRINCIPLES OF PROFESSIONAL CONDUCT

Preamble

Founded in 2004, Planned Giving for Portage County is an alliance of non-profit organizations and professional advisors who are focused on educating our community on the value of planned giving.

PGfPC is committed to professional excellence characterized by the tenets of respect, care, honesty, and responsibility. Members of PGfPC believe that respect, care, honesty, and responsibility are inspirational principles of conduct that have a positive impact on members, clients, and patrons. It is in this spirit of professional excellence that Planned Giving for Portage County has adopted these principles. Adherence to these principles will ensure delivery of the highest quality of service while serving with exemplary fundamentals of professional behavior.

Principle I

Respect and Care for all people we serve

PGfPC members shall:

1. Actively promote planned giving.
2. Strive to represent and serve the diversity of our communities.
3. Abide by individual agency's confidentiality policy.
4. Work first to serve the community as a whole over personal or professional interests.

Principle II

Honesty through Stewardship and Accountability

PGfPC members shall be accountable for all organizational resources, donated and purchased, and shall preserve the integrity of PGfPC through good stewardship.

PGfPC members shall:

1. Understand that all information created by, or on behalf of, PGfPC is the property of PGfPC and shall not be transferred or utilized except on behalf of PGfPC.
2. Take care to ensure that all solicitation materials are accurate and correctly reflect PGfPC's mission and use of solicited funds.
3. Put the PGfPC mission above personal gain or compensation considerations.
4. Ensure that contributions are used in accordance with donors' explicit intentions.
5. Ensure, to the best of their ability, proper stewardship of charitable contributions, including timely reporting on the use and management of funds and explicit consent by the donor before altering the explicit conditions of a gift.

Principle III

Responsibility for Professional Credibility

PGfPC members shall:

1. Disseminate only truthful and correct information, and act promptly to correct erroneous communications for which they are responsible.
2. Not intentionally damage the reputation of PGfPC, its members, or any affiliate or non-affiliated organization and/or community business.
3. Disclose or refrain from all relationships which might constitute or appear to constitute conflicts of interest, boundary or role confusion.
4. Not engage in any criminal offense or professional misconduct, avoiding even the appearance of criminal offense or professional misconduct.
5. Truthfully report or present services, professional credentials, and qualifications to the community or members.
6. Only offer services that are within their professional competency.
7. Strive to maintain and improve professional knowledge, skills, and abilities.

These Principles of Professional Conduct are intended to augment and not replace PGfPC policies or standards for individual professionals who have memberships, licenses, or affiliations with other professional organizations such as, but not limited to, the National Association of Social Workers, the Association for Fundraising Professionals, the Public Relations Society of America, and the Certified Boards of Accountancy.