



INSIGHT  
PHILANTHROPY  
RESULTS

# EXPLORE

PD25

*New Depths*

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



How to Protect Your Organization and Your Staff

# Ask the Ethicist: When Donor Behavior is an Organizational Risk

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PD25  
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While you're waiting,  
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evaluations in the mobile app!





# Meet the Presenters



**Kate  
McConnell,**  
Director, Prospect Management  
City of Hope  
Chair, Apra ECC



**Stephanie  
Huggins,**  
Senior Associate Director  
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Co-Chair, Apra ECC

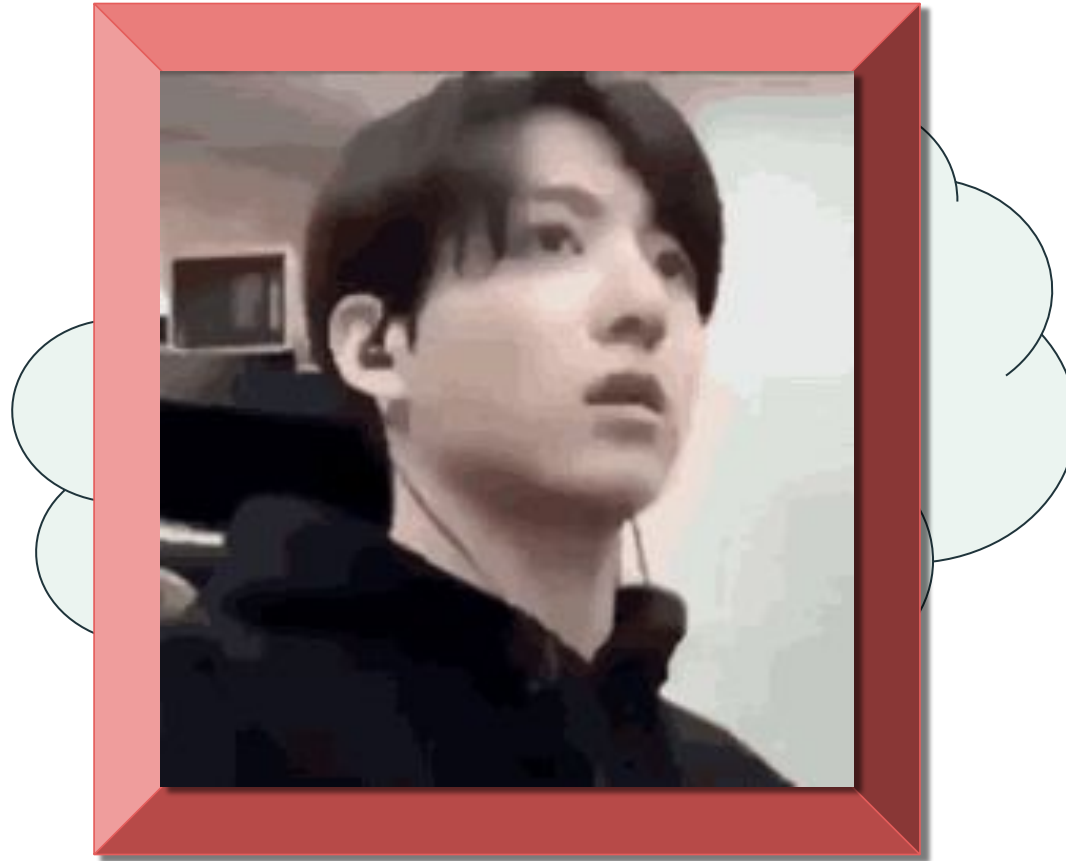


**EXPLORE**  
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**With the help of  
BTS and BT21!**



# Design > Default





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NOT TODAY



# Planning for TOMORROW

The ECC has developed a resource for PD professionals to answer:

How to define **organizational values**

When a **1:1 relationship** is unsafe

How PD can support **donor-facing** staff

The **scope** of PD responsibility

How to **identify and record** potential issues

How to **advocate** for ethical practices

How to **manage relationships** with prospects who demonstrate **values misalignments**





**Introducing:**  
**Apra's Best Practices:  
Relationship Management & Values Misalignments**



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# What's a Values Misalignment, Anyway?



**Values Misalignment** can refer to beliefs or conduct that exhibit a misalignment with organizational values. These misalignments can be found in publicly available information or experienced privately by donor-facing staff.

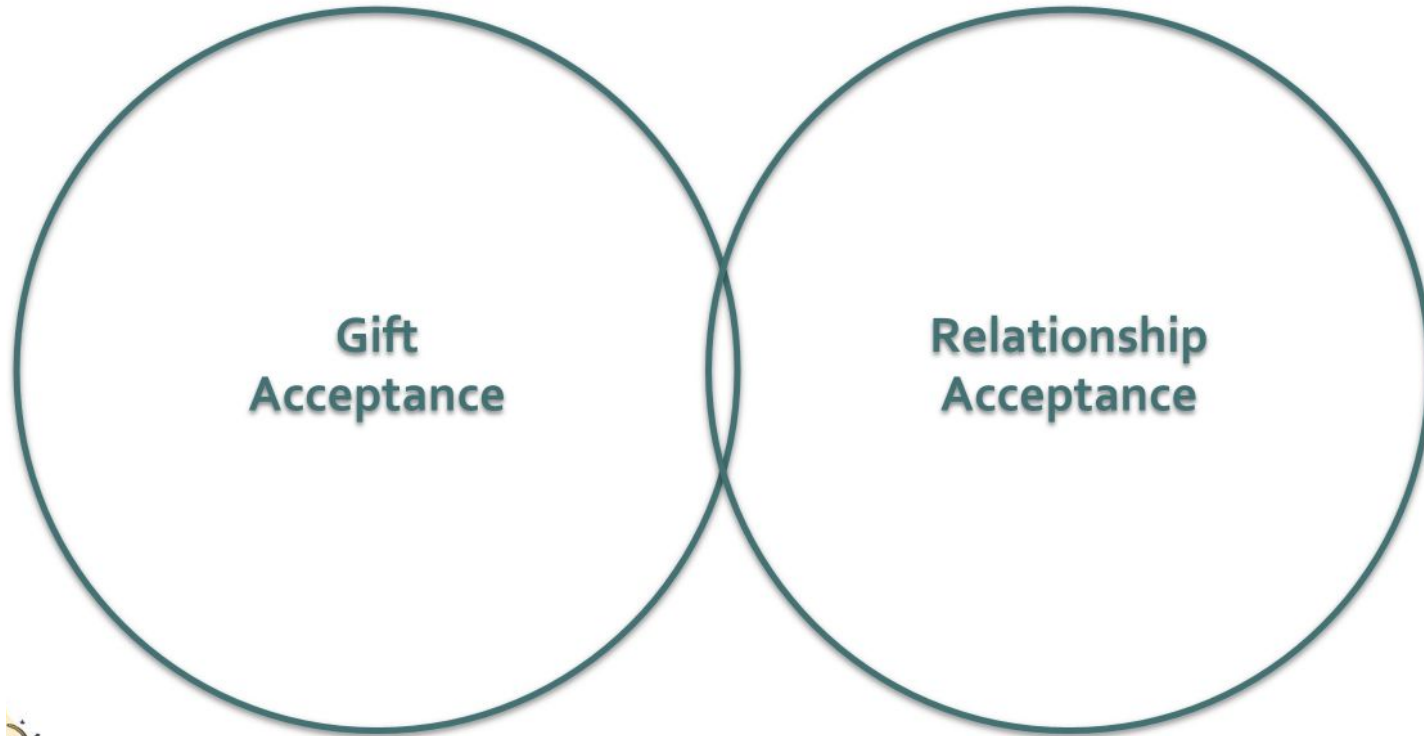


# Scope

The scope of Apra's best practices for **Relationship Management & Values Misalignments** is specific to **relationships only**.



# Scope



They **work in tandem** with gift acceptance policies, and should not contradict them, but **serve a different purpose.**



**Best Practice #1:**

**How to Define  
Organizational  
Values**

**Best Practice #2**

**Evaluating a  
Values  
Misalignment**

**Best Practice #3**

**Recording &  
Reporting**

**Best Practice #4**

**Relationship  
Review**

**Best Practice #5**

**Assignment**

**Best Practice #6**

**Gift Officer  
KPIs, Gift  
Acceptance, and  
Future Contact**

**Best Practice #7**

**Advocating to  
Leadership**

**Best Practices :**

**Relationship Management  
&  
Values Misalignments**



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# Best Practice #1: Defining Organizational Values

Regardless of whether your organization has a specified statement of values, **every organization has values embedded in what they do.**





# Best Practice #2: Evaluating Misalignments

The following questions can be used to evaluate a potential misalignment

➤ Organizational Risk:

- Does it create obstacles to your org's purpose/mission/values?

➤ Risk to Staff

- Does it create an unsafe working environment?
- Does it prevent staff from remaining committed to org purpose/mission/values?

➤ Reputational Risk:

- Does it indicate potential to reflect negatively on your org?



# Best Practice #3 - Recording & Reporting

1

**Record it**  
in your CRM

**Review it**  
with your manager

2

**Escalate it**  
if necessary

3

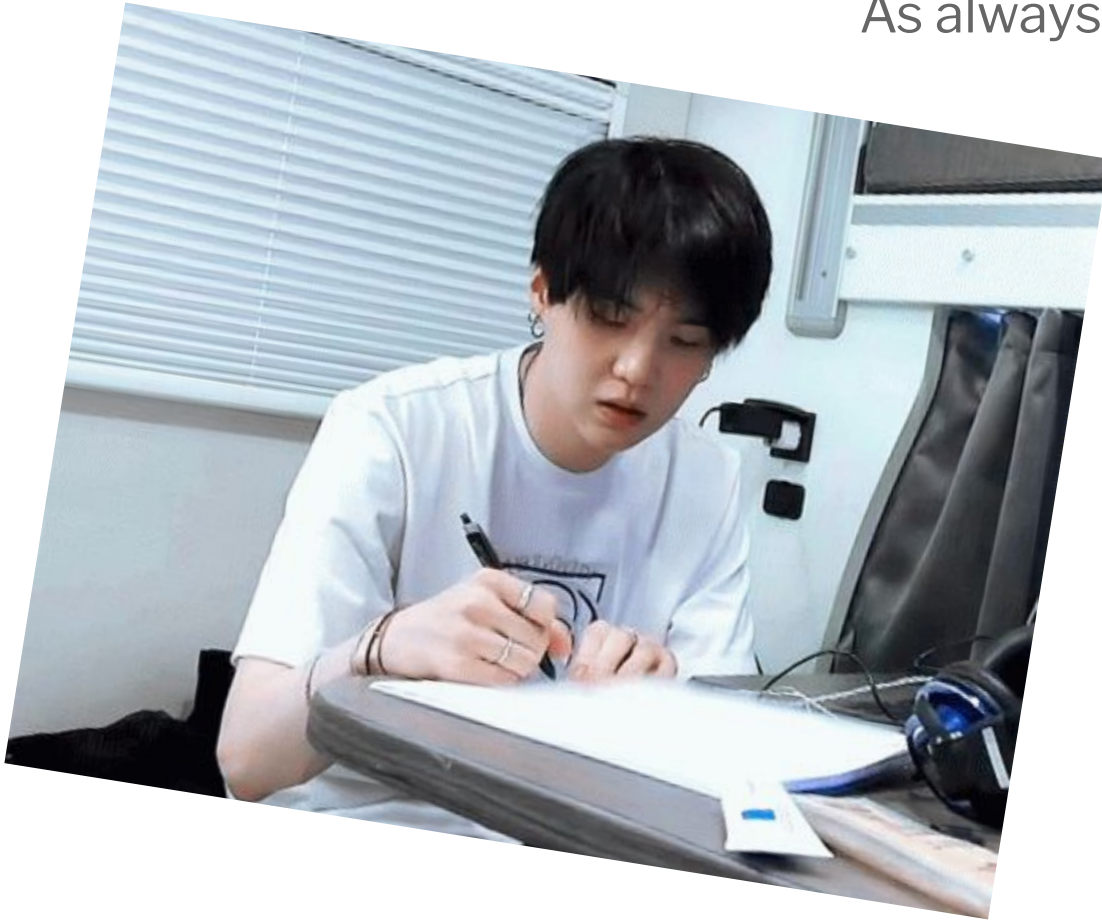
**All staff** should be **expected** to raise a Values Misalignment when they become aware of it.





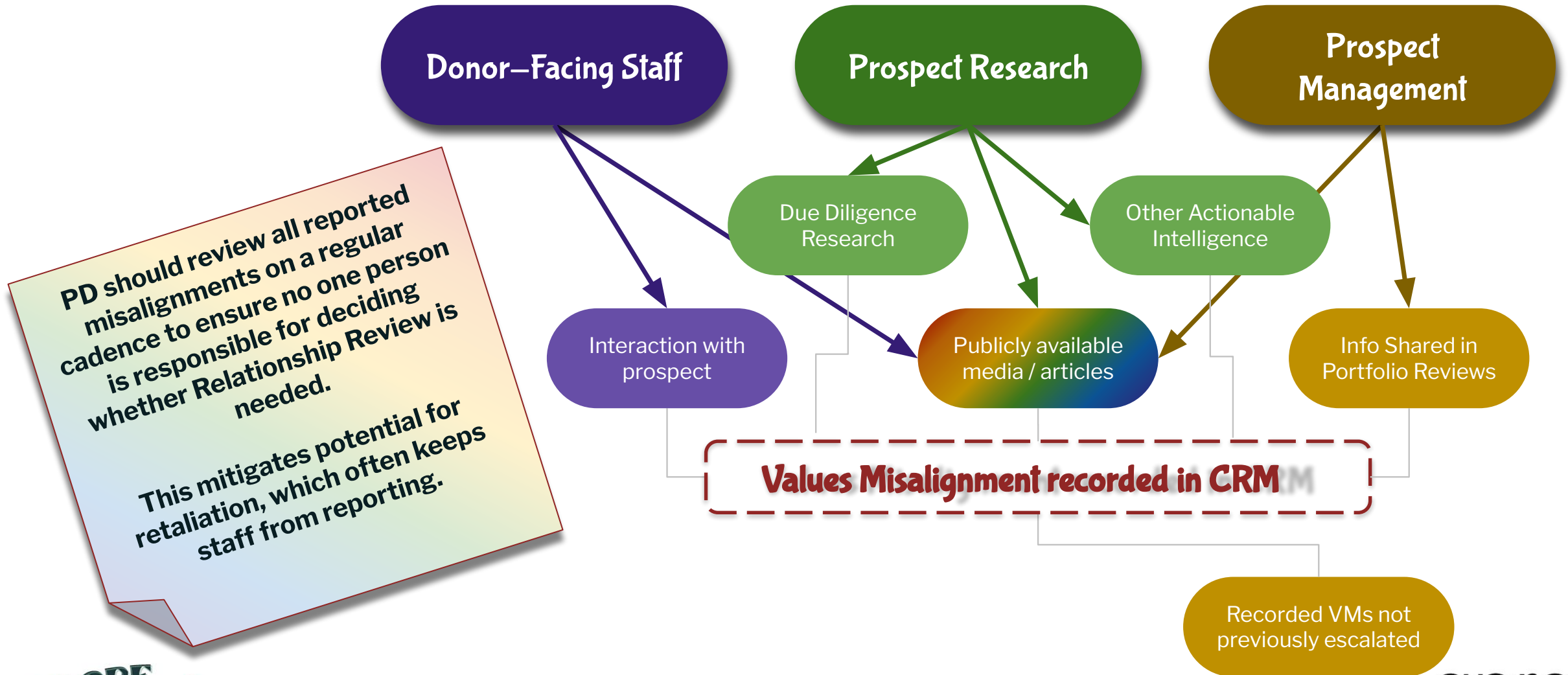
# Best Practice #3 - Recording & Reporting

As always, remember to record sensitive information carefully.



- **Stick to Facts.** Avoid subjective commentary, and include links/tangible proof when possible.
- **Make it Accessible.** Use your procedure for tracking contact reports so anyone reviewing the record will come across it.
- **Confirm Legal Compliance.** Consult legal/compliance department or seek outside legal review of your policies.

# Best Practice #3 - Recording & Reporting





# Best Practice #4: Relationship Review

Misalignments that pose significant risk **must be reviewed** to determine whether continuing a 1:1 relationship is safe and appropriate.

Relationship Reviews **must be evaluated by 2 or more people**. At minimum, this should include:

- The **manager** of the reporter
- A member of the **PD team**



# Best Practice #4: Relationship Review

Shared responsibility for Relationship Reviews **reduces liability** for any one person and keeps **clear and sufficient boundaries** in place.



...Additional leaders, PD staff, or other colleagues can be added to the review process to represent a range of perspectives and thereby minimize the impact of individual unconscious bias.



# Best Practice #5 - Assignment



Removal from Portfolio *and*  
Refusal of all Gifts

Removal of Prospect from Portfolio

No Assignment Change

In some very limited cases, if a high-level relationship is involved, the prospect may be removed from an individual portfolio and assigned to PD staff or leadership - **NEVER to another gift officer!**

# Best Practice #6: Impact On...

## Gift Officer Metrics / KPIs

In the event that a review results in removal from a portfolio, any **KPIs should be reviewed and adjusted** so no Gift Officer is penalized for reporting a misalignment.

## Gift Acceptance

If a review results in removal from a portfolio, especially if the misalignment is severe, **your organization may consider refusal of all gifts from the prospect**. The final decision will be determined by your organization's Gift Acceptance Policy.

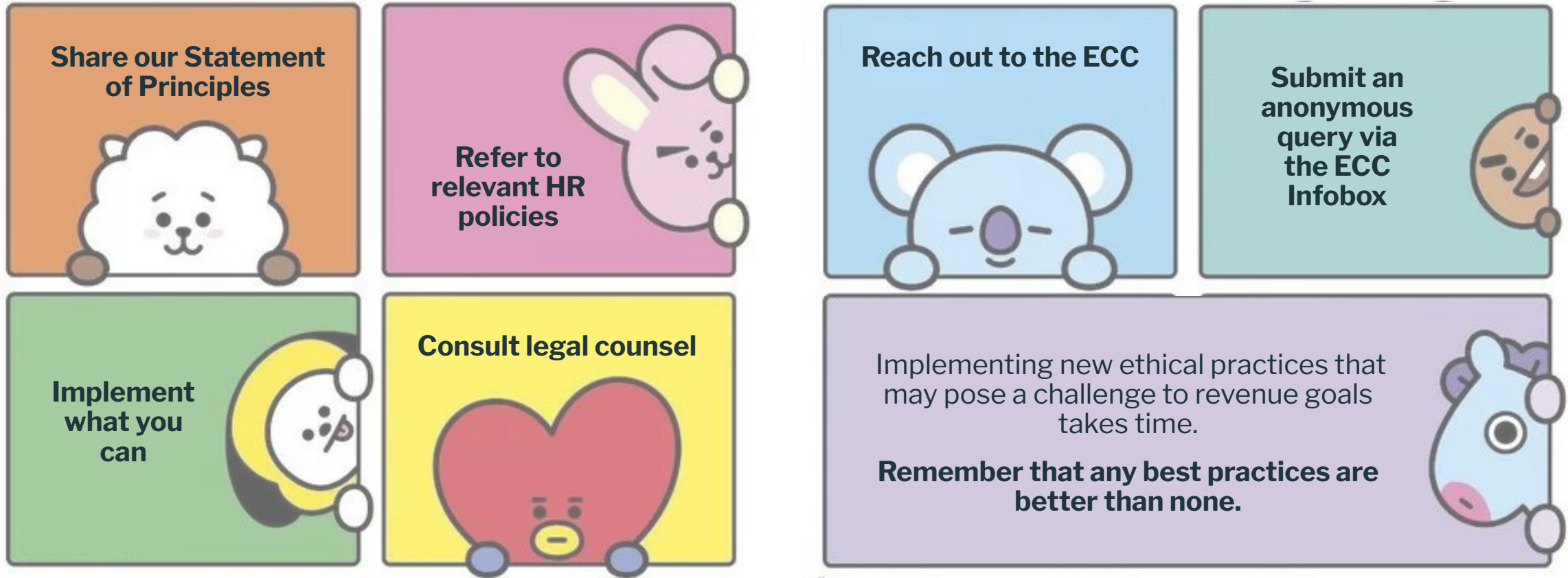
## Future Contact, Solicitation, and Prospecting

If a review results in removal from a portfolio, they **should not be eligible for future prospecting**, including any future wealth screenings. Your organization should also consider adding **Do Not Contact** and/or **Do Not Solicit** coding in your CRM.



# Best Practice #7: Advocating to Leadership

We recognize that leadership may override attempts to implement these best practices. In these cases, we encourage PD staff to:







# Group Discussion





# Audience Interaction



How have you approached an assignment when faced with a scenario where a relationship with a donor presents reputational risk because of their source of wealth?



What about when the source of wealth is spotless, but the relationship is unsafe because of behavior toward organization staff that is abusive, offensive, etc?



# Audience Interaction



Have you tried to advocate for something that contradicted your leadership, in these cases? How? What was the response?





# Huge thanks to our committee for their work!

*Best Practices Subcommittee:* Ivy Collier, Lucy Pastier, Danita Hill, Kate McConnell

plus

Stephanie Huggins, Jennifer Schlager, Emily Winkle, Becca Gonzalez, Sierra Bulson, Crystal Cabral, Jennifer Kehoe, Anna Sheehan, Don Irwin, Kirsten Reece, Matt Morneault



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# THANK YOU!



Please complete your session evaluations in the mobile app.

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