



ATID Code of Ethics

Drafted 2023 by the Ethics Task Force of ATID. Adapted from NATA (National Association for Temple Administration) and AFP (Association of Fundraising Professionals) Codes of Ethics.

I. Introduction

As members of Advancing Temple Institutional Development (ATID), we hold ourselves to the highest standards of personal and professional integrity. This Code of Ethics is intended to articulate expectations and standards for ATID members.

Our members agree to adhere to this Code of Ethics, and to hold ourselves and our colleagues to these standards.

II. Personal Responsibilities

As professionals, we agree to hold ourselves to the highest standards of ethical behavior:

- Practicing our profession with integrity and honesty.
- Serving as role models for our colleagues.
- Being kind and fair in our interactions.
- Treating others with dignity and respect.
- Never exploiting relationships with donors for personal gain.

III. Professional Responsibilities

- Acting with the best interests of our organizations in mind at all times, remembering that our primary responsibility is to our synagogues and not to any individual or constituent group.
- Adhering to the internal codes and policies outlined by our organizations.
- Accurately representing accomplishments and achievements.
- Coming forward to admit mistakes, missteps, or wrongdoing, and accepting responsibility, including appropriate consequences, for our errors.
- Acting with discretion and carefully guarding confidential information.
- Valuing the privacy, freedom of choice, and interests of our donors.

- Staying informed regarding information relevant to our profession (including, but not limited to, tax codes, estate planning, etc.) and providing excellent options to our donors.
- Recognizing the boundaries of our roles and advising donors to seek expert financial or legal advice where appropriate.
- Protecting our institutions by utilizing gift agreements where appropriate that clearly outline the obligations of both donor and institution. Appropriate legal counsel should be engaged in the development of such documents.
- Giving donors the opportunity to understand how contributions are accounted for and publicly reported.
- Respecting donor intent, and ensuring appropriate documentation to support donor intent in the event that a donor is no longer available to express their wishes.
- Exercising the utmost care in the way that we speak about donors, their preferences, and their contributions.
- Using accurate, consistent accounting methods that conform to generally accepted practices when reporting fundraising results.
- Helping our colleagues and institutions improve by soliciting and passing on thoughtful, constructive feedback in a kind and appropriate manner.
- Advocating for equitable practices within our organizations.
- Avoiding even the appearance of impropriety.

III. Healthy Work-Life Balance

Our work can be deeply meaningful and rewarding. At the same time, it may become all-consuming from time to time. Healthy work-life balance is essential to the future of our profession. We agree to:

- Be aware of the signs of burnout, knowing that we cannot be at our professional or personal best when we are exhausted, and asking for appropriate help or accommodations as needed.
- Set an example to others, especially those we supervise: taking allotted vacation time, not working consistently throughout vacations, weekends, or holidays, or expecting others to do so; taking time off when ill, and encouraging others to do the same.
- ATID members recognize that they must provide support for work/life balance for their direct reports, which may include help or accommodation.

IV. Social and Public Persona

Professionals are entitled to their own private lives, yet we accept that our role within religious institutions means that we are held to high standards. We agree to:

- Be aware how our behavior outside the workplace may reflect on ourselves, our profession, and our organizations, and act accordingly with good personal and professional judgment. This extends to organizations with which we may affiliate, relationships we may maintain, our online/social media presence, and more.

V. Misconduct

ATID members condemn, in the strongest terms, all forms of bullying, harassment, and other forms of unwanted behavior. As ATID members, we never:

- Engage in bullying of any kind.
- Engage in any acts that compromise our colleagues' ability to enjoy a safe and healthy work environment.
- Engage in sexual misconduct, which may include:
 - Unwelcome sexual advances, unwelcome requests for sexual favors, and/or other unwelcome contact of a sexual nature.
 - Sexual contact of any kind with individuals with whom we are in supervisor/supervisee relationship.
 - Sexual contact of any kind with those unable to give consent.
- Further, we accept our responsibility to protect victims of abuse or neglect when we are made aware of those circumstances, whether inside or outside the workplace. While reporting may not be mandatory in all situations, we agree to take appropriate action on all reasonable concerns of misconduct.
- In our sector, 75% of fundraisers experience sexual harassment at work.¹ It is the responsibility of each ATID member to ensure a safe and respectful working environment for our colleagues, and to report misconduct as appropriate.

VI. Confidentiality and Privacy

Confidentiality and privacy are key principles in ATID and in our profession. ATID members agree:

- Not to disclose privileged or confidential information to those for whom the information was not intended.
- To use professionalism and good judgment when engaging in tools like social media, message boards, online forums, etc. to obtain advice or counsel from colleagues.
- To give donors the opportunity to decide when, where, how, and if their names will be publicly distributed in recognition for contributions.

VI. Conflicts of Interest

ATID members should avoid conflicts of interest and the appearance of such conflicts:

- A transaction in which an ATID member or close family member has a direct or indirect interest, financial or otherwise, in the outcome of any transaction involving ATID or the member's organization.
- Where considerations or competing interests exist, real or perceived, other than the best interest of ATID, or the ATID member's organization.

¹3 in 4 fundraisers have experienced sexual harassment on the job often because of inappropriate behavior from donors retrieved May 15, 2023 - <https://theconversation.com/3-in-4-fundraisers-have-experienced-sexual-harassment-on-the-job-often-because-of-inappropriate-behavior-from-donors-183332>

- A situation in which an ATID member has a relationship with other parties that might reasonably be expected to affect the conduct of the individual in a manner inconsistent with the overriding duty one has to advance the interest of ATID or the ATID member's organization.
- Members should consult others (ATID Board of Directors, leaders of their organizations—e.g., Senior Rabbi, Executive Director or head of administration, Board President—regarding the acceptance of gifts, honoraria, royalties, etc., where potential conflicts of interest may occur. One should also be guided by any relevant documentation or policies from our respective organizations (e.g., employee handbook, conflict of interest policy, etc.)
- Members have an obligation to disclose real or perceived conflicts of interest involving other ATID members.

VII. Whistleblower Protection

ATID promotes compliance with our ATID Code of Ethics as well as employer policies and procedures, and applicable laws and regulations. We desire to encourage and enable ATID members to raise concerns founded in good faith about such violations. Matters that should be reported under this policy may include:

- Abuse, neglect, harassment, retaliation, or bullying
- Fraud, waste, or abuse
- Theft or misuse of assets
- Discrimination
- Breaches of confidential information
- Undisclosed conflicts of interest

ATID will take no adverse action or other retaliation against any individual who in good faith reports a suspected violation of the ATID Code of Ethics or assists in an investigation. ATID members shall not take adverse action against any person who makes a good faith report of a violation or suspected violation.

- ATID members recognize that they must provide whistleblower support for their direct reports.

VIII. Reporting and Investigating Complaints or Allegations

Complaints or allegations may be made in writing to the President or Vice-President of ATID. Contact information for these professionals can be obtained by visiting www.atidnet.org. Upon receipt of an allegation, the following steps will be taken:

- The ATID Board of Directors will meet to review the claim and any relevant documentation. The Board will determine whether the claim is credible.
- If it is found to be credible, the Board will refer the complaint as appropriate, e.g., to the member's institution; to the URJ, and/or to other authorities.
- The ATID President or Vice-President will notify the member in question of the suspected violation and the steps being taken to refer the complaint.

- ATID members agree to provide reasonable cooperation in any investigations or adjudications that may take place involving members in good standing. ATID will not conduct investigations; neither will ATID provide financial support in the investigation or adjudication of ethics complaints or violations.
- ATID recognizes that investigations are sensitive and complex, fraught with potential legal issues, and require specialized training to conduct. ATID further recognizes that applicable laws, including those granted to workers, vary by location. We strongly encourage institutions or bodies that may need to investigate ethics complaints not to conduct such investigations themselves, but rather to engage qualified legal counsel.