

Central PA Annual Conference

October 25, 2017

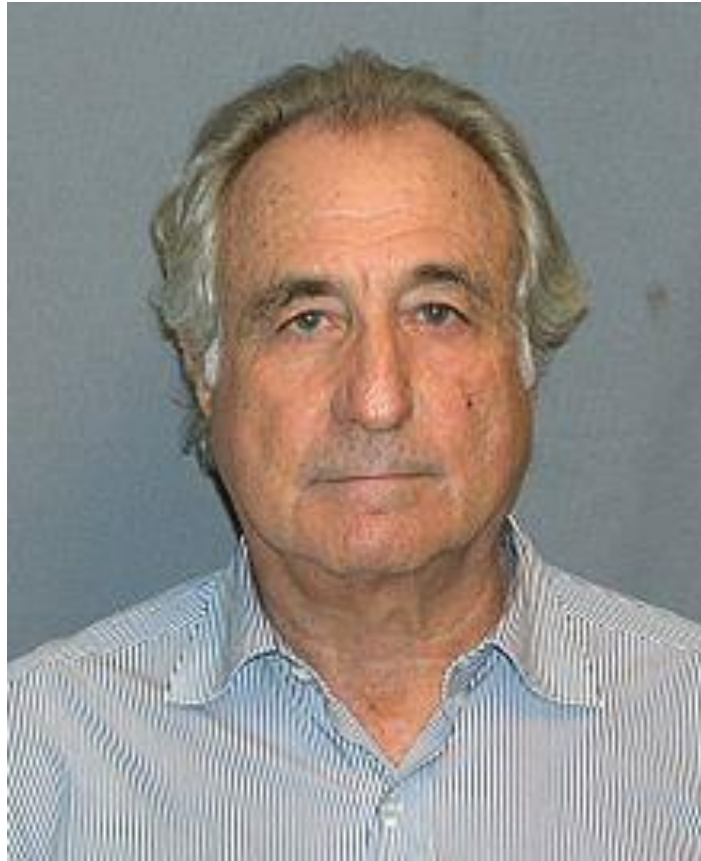
Presented by:

Joe Chickey

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Bernie Madoff



Rod Blagojevich



Lance Armstrong





Cersei Lanaster



Mary Crowley



Anne Bonny



Elizabeth Holmes



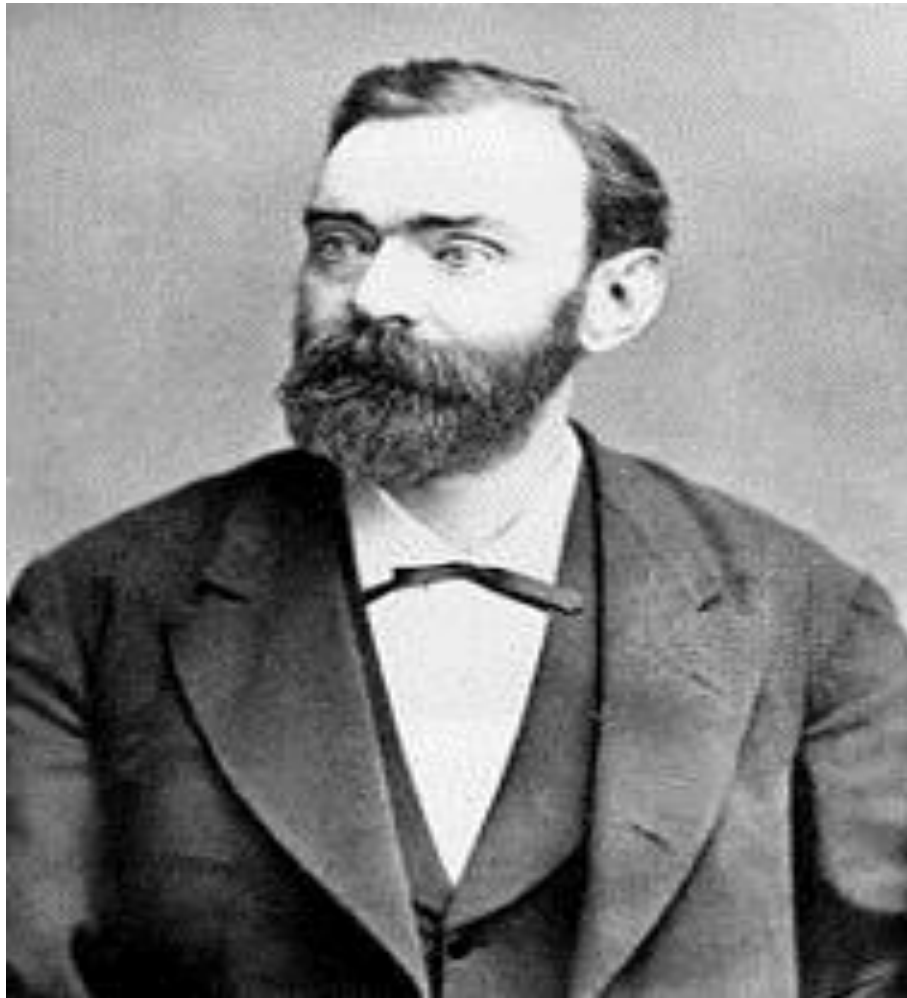
Rachel Duncan



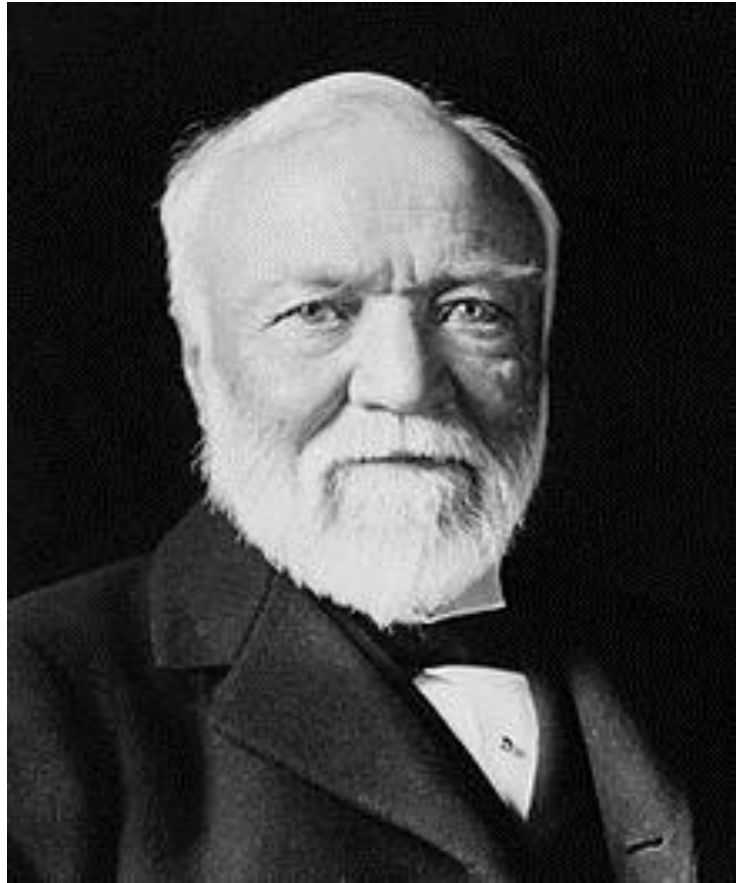
Delores Umbridge



Alfred Bernard Noble



Andrew Carnegie



Three Easy Ethical Tests

The Stomach Test: If your stomach gets queasy, maybe your body is talking to you.

The Relative Test: Is this right for your mother? Maybe it's not right for your donor.

The “60 Minutes” Test: Would you be comfortable explaining what you are doing to an investigative reporter in national media?

Financial and Legal Ethics Issues

- Talk with their advisor
- Recommend at least 3
- Share ideas and donor stories
- Involve family in discussions
- Encourage written documentation

What's right for the Donor

- Is it too much money
- Irrevocable vs Revocable
- Tax benefits?
- Current or Endowment
- Donor's legacy/Restricted
- Anyonymity

What's right for the Charity

- Unrestricted vs Restricted
- Long term Vision
- Institutional Priorities
- Current or Endowment
- Revocable vs Irrevocable
- Life vs Term of Years

Compensation

- Finder's Fees
- Commissions for gift planners
- Incentives
 - % of Salary
 - Non-Financial Indicators
 - Weight and Rate System
- Donor gifts

Key Documents

- **CGP(PPP)/ Model Standards Of Practice**
- **AFP/ Code of Ethical Principles and Standards**
- [Administration on Aging](#)
- [American Association of Retired Persons](#)
- [National Center on Elder Abuse](#)
- [National Committee for the Prevention of Elder Abuse](#)
- [National Council on Aging](#)
- [National Association of States United for Aging and Disabilities](#)
- See also: [*The Chronicle of Philanthropy's* Special Report on Aging](#) and the [Securities and Exchange Commission's "Most Common Older Investor Scams"](#)

ReNaming Challenges

- Vandy/ Confederate Memorial Hall
- Simkins Hall/ University of Texas
- Donor becomes a criminal

Vandy – Confederate Hall



Simkins Hall - UT



Randy Pausch

