



VALUES AND CODE OF CONDUCT

JANUARY 2025

OUR VALUES

As an Action Planning Associate Consultant, we expect you to always act in ways which foster, promote and align with our Values:

- **Integrity** - We want to be trusted by our clients and by each other, and therefore strive to be honest and ethical, and to follow good practice and accepted codes of practice in our work.
- **The individual** - We value our staff and their families, all those that work in the not-for-profit sector, and all who voluntarily give time and money to support not-for-profit organisations. We will respect our clients and each other and we will recognise that every relationship depends upon a balance of rights and responsibilities.
- **The environment** - We aim to minimise the impact of our business on natural resources.
- **Quality** - We strive to give our clients excellent value for money, using insight and creativity to solve problems and develop opportunities, and completing each assignment to the best of our ability. We will not just go through the process, but we will aim for success for our clients. We want to startle our clients with the quality of our service.
- **Quality of life** - We want our clients and colleagues to find that we are nice people to do business with. We value fun and believe that everyone works best when they are enjoying themselves.
- **Passion for the sector** - We value the principles of volunteerism, philanthropy, and working collaboratively to make the world a better place, without always having an eye to the bottom line.

CODE OF CONDUCT

As an Action Planning Associate Consultant, you are required to commit to follow at all times the standards and behaviours (“the standards”) set out in our Code of Conduct.

These standards and behaviours are required in relation not only to our interactions with Action Planning’s clients, their beneficiaries, other associate consultants, and Action Planning itself, but also to the charity sector and general public more widely. Every person who volunteers with, works with, or comes into contact with an Action Planning Associate should be treated with dignity and respect, and feel that they are in a safe and supportive environment.

1. Professional Behaviour

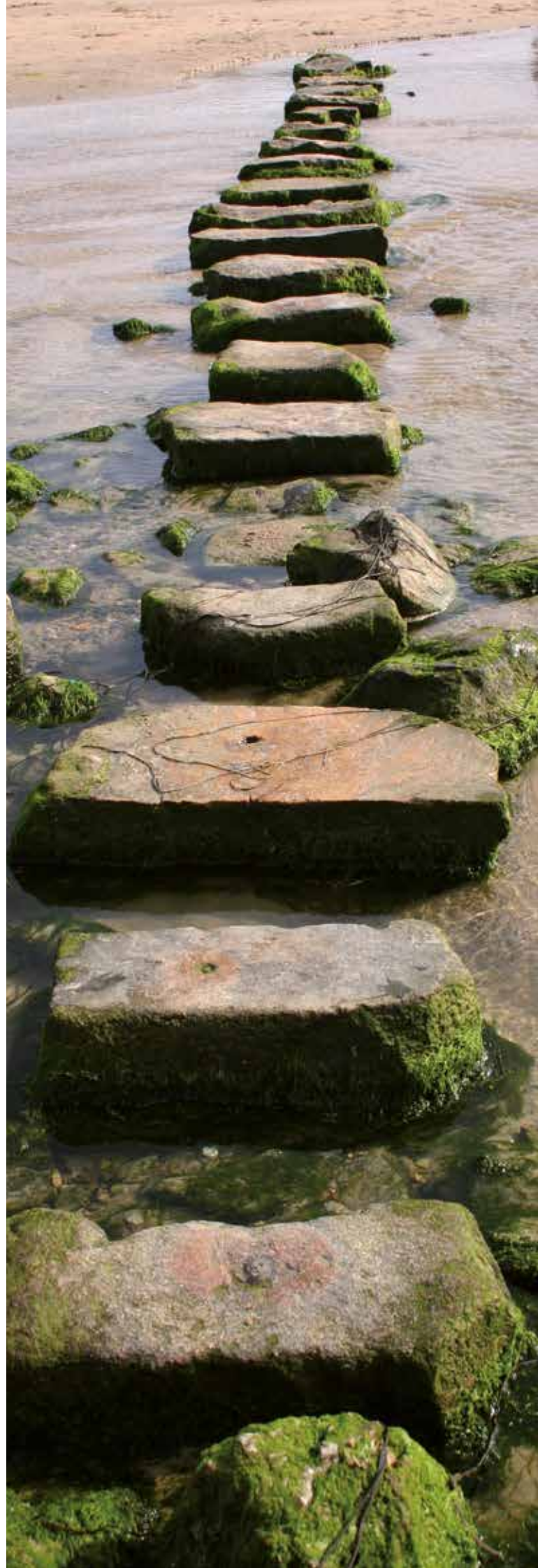
- Follow, without exception, all applicable UK laws, regulations and professional conduct standards, and interpret them in accordance with being legal, honest, open and respectful.
- Uphold the highest professional standards of personal conduct in every professional situation, including on social media, and accept responsibility for your own professional actions and decisions.
- Treat everyone with dignity and respect.
- Promote an environment that is free from, and intolerant of, harassment, bullying and discrimination in all its forms.

- Harassment has a specific meaning in the Equality Act 2010. It is ‘unwanted conduct related to a relevant protected characteristic, which has the purpose or effect of violating an individual’s dignity or creating an intimidating, hostile, degrading, humiliating or offensive environment for that individual’.

- Bullying is not specifically defined in UK law, but Acas says bullying ‘may be characterised as: “offensive, intimidating, malicious or insulting behaviour, an abuse or misuse of power through means that undermine, humiliate, denigrate or injure the recipient’.

- Discrimination is the ‘unjust or prejudicial treatment of different categories of people, especially on the grounds of a protected characteristic’

- Follow the behaviours and standards set out in your professional body’s Code of Conduct.





2. Professional Standards

- Maintain a level of professional knowledge and competence appropriate to your responsibilities.
- Commit to continuous learning to ensure your knowledge and skills are up to date.
- Seek appropriate support if required.

3. Ethical Standards and Integrity

- Act with integrity and avoid any acts, omissions or practices which harm our clients or their beneficiaries, our Associate community, our stakeholders, Action Planning, or the general public.
- Act honestly at all times, prioritising the interests of our clients and being a steward of their interests for the benefit of their beneficiaries, Action Planning, and wider society.
- Inform Action Planning of any potential conflict of interest, or deviation from these standards, at the earliest opportunity to ensure that there is complete transparency for all involved, and that issues can be addressed in a timely manner.
- To not make any exaggerated or unsubstantiated claims about your achievements and/or experience.
- Immediately advise Action Planning of any behaviour which may have the potential to bring Action Planning into disrepute.
- Immediately inform Action Planning of your suspension or removal from any professional body of which you are a member including an investigation into your practice and the reasons for being removed.

4. Representative of Action Planning

- Act at all times in a way which supports and upholds the reputation and values of Action Planning.
- Comply with prevailing UK laws, and challenge others whom you suspect may be involved in unlawful or unethical conduct or behaviour, taking appropriate action as required.
- Act positively and in a manner that increases public understanding of the charity sector.
- Support the professional development of others in the sector.

5. Breaches of our Values and Code of Conduct

We will promptly investigate any potential breaches of this Code of Conduct which are brought to our attention. Depending on the specific breach, we may temporarily suspend an Associate from Action Planning, while we complete our investigations. This investigation will always include speaking to the Associate concerned about the allegations.

If an investigation finds that an Associate has breached this Code of Conduct, we will be uncompromising and robust in determining next steps which may include permanently removing the Associate from Action Planning's Associate Community.



Any questions about this Code of Conduct should be directed to one of the following:

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