

Project Management Institute Educational Foundation Donor Guidelines

Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that the PMI Educational Foundation's (PMIEF) philanthropic work merits the respect and trust of the general public, and donors and prospective donors can have full confidence in PMIEF, we declare that all donors have these rights:

- I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II. To be informed of the identity of those serving on the organization's governing board and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III. To have access to the organization's most recent financial statements.
- IV. To be assured that gifts will be used for the purposes for which they were given.
- V. To receive appropriate acknowledgement and recognition.
- VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent as provided by law.
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

Donor Gift Acknowledgement Guidelines:

Donors enable PMIEF to deliver programs that advance our mission, *project management for social good*. To demonstrate our sincere appreciation to donors whose contributions represent a commitment to our mission, PMIEF's guidelines call for prompt, personal, and consistent acknowledgement of each gift received.

- **All Gifts** – Each and every gift will be consistently and appropriately acknowledged within 14 business days of gift receipt.
- **Gifts of US\$500 or greater** – The PMIEF Chair of the Board and/or his/her Board Member designee shall send a personal letter acknowledging the gift(s).
- **Matching Gift** acknowledgements will be sent to any corporation matching an employee's/former employee's gift, and provided the company provides specific donor information, the donor will also receive a gift acknowledgement.
- **Donations of Gifts-in-Kind** shall be acknowledged in a manner similar to all gifts with the exception that, in accordance with U.S. Internal Revenue Service regulations, the acknowledgment will indicate the type and description of the gift.

Donor Gift Recognition Guidelines:

Donor recognition is an essential element of any organization. PMIEF's donor recognition guidelines ensure that all donors are treated in a prescribed and consistent manner in regard to their level of donation.

Recognition programs are effective when they are flexible, meaningful and multi-tiered. Recognition levels exist in order to promote increased giving and to encourage others to contribute.

Annual donors may be recognized, by gift level, on the PMIEF Website and in the PMIEF Annual Report. A donor may choose to remain anonymous. In addition, all individual donors receive the newsletter, *PMIEF PM Philanthropist*.

Special Recognition/Naming Opportunities:

The naming of an initiative, scholarship or publication reflects the importance of the donor to the realization of PMIEF's vision and mission and provides prestige for a committed donor.

While PMIEF maintains absolute discretion in regard to recognition thresholds and special recognition, the following guidelines apply:

- **Events** – The recognition *giving threshold* regarding the sponsorship of a special event or award(s) program is \$35,000. Donors may be recognized in event programs or other printed materials as long as recognition does not create the appearance of endorsing a specific product or viewpoint of the donor.
- **Publications** – Donors may be recognized in a number of PMIEF publications, provided recognition of donors does not give the appearance in any way of influencing a grant award/program or initiative outcomes.
- **Endowed Scholarships** – The *giving threshold* for the naming of an endowed scholarship is \$25,000. While a donor may be given the opportunity to review the final candidate, PMIEF retains complete autonomy in the final selection.
- **Named Project or Initiative** – The *giving threshold* for the naming of a specific project or initiative is determined by the scope/scale of the project/initiative and attendant budgetary requirements.

Customized Recognition Plans for Major Donors (\$25,000+) may include:

- Enhanced communications re: gift – internal/external audience communication from the Executive Director;
- Press release/publication *story*
- Structured media events/photo opportunities
- Donor profile featured in: Annual Report, PMIEF Website, or program materials;
- Prominent placement/photo/logo in Annual Report donor listing;
- Contribution launch/announcement special event;
- Private lunch/dinner with PMIEF Executive Director, Board Members or others.
- Commemorative gifts/mementos may be presented to donor(s) as an expression of appreciation, e.g., book, lapel pin, photograph, plaque, pen, etc.
- Cards, flowers, small gifts in recognition of donor life events.