	<b>LEVEL 1 FOUNDATION POLICY:</b> <b>PMIEF Board authors, approves and monitors</b>	<b>No.:</b>
		<b>Date Approved:</b>
<b>POLICY TITLE:</b>	PMIEF Donor Bill of Rights	<b>Rev No.:</b> 1
		<b>Rev Date:</b> 8 July 2008 <b>Page:</b> 1 of 2
<b>RESPONSIBILITY OF:</b>	PMIEF Board of Directors	
<b>PREPARED BY:</b> PMIEF Board and Staff		<b>APPROVED BY:</b> PMIEF Board of Directors

**I. POLICY STATEMENT:**

To ensure that the philanthropic work of the PMI Educational Foundation merits the respect and trust of its individual and organizational donors, the PMI Educational Foundation has adopted a Donor Bill of Rights

Background: As stated in its Bylaws (Article II – Purposes and Limitations of the Foundation), *the Foundation is organized and shall be operated exclusively as a nonprofit charitable “supporting organization” within the meaning of Section 501(c)(3) and Section 509(a)(3) of the Internal Revenue Code of 1886, as amended, ...* . Furthermore, as stated in this same Bylaw, PMIEF has been organized for several purpose of which one is “to receive and administer funds ...”

- II. PURPOSE:** The purpose of this policy is to ensure that donors (individuals, PMI Components, and corporate) understand the respect provided to them by PMIEF and to:
- a. Provide clear direction from the PMIEF Board of Directors.
  - b. Define clearly the responsibilities of the PMIEF Board, the PMIEF COO, and staff.
  - c. Provide an adequate basis for evaluating compliance with the policy.

- III. DESIRED RESULTS/OBJECTIVES:** A donor bill of rights covering the manner in which donors are treated, donations are received, and donations are used.

**IV. DEFINITIONS:**

PMIEF Donor Bill of Rights III: *To have access to the organization's most recent financial statements* will be satisfied by posting the most recent financial audit.


PMIEF Donor Bill of Rights I (third portion) *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* will be satisfied by being able to refer to the PMIEF Annual Report, which will illustrate the dispersal of available program funds during the year of availability (i.e. be able to show that PMIEF gave away what it had available).

**V. POLICY DISSEMINATION:**

**Internal:** PMIEF Board, PMIEF COO, PMIEF and PMI Staff as needed, (e.g. PMI Customer Care)

**External:** Post on PMIEF web site and reference in articles when appropriate.

- V. SUPPORTING DOCUMENTATION:** The PMIEF Donor Bill of Rights is as follows:

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### **The PMIEF Donor Bill of Rights**

*This Donor Bill of Rights was created by the Association of Fundraising Professionals (AFP), the Association for Healthcare Philanthropy (AHP), the Council for Advancement and Support of Education (CASE), and the Giving Institute: Leading Consultants to Non-Profits. It has been endorsed and adopted by numerous organizations, including the PMI Educational Foundation.*

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 philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, 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 their 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 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.