

Donor Guidelines

Effective Date:	January 2024	Team:
		PMIEF
Last Update:	December 2023	Responsibility of:
		PMIEF Executive Director

Purpose

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. To do this we commit donors have access to the following:

- 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 PMIEF Board of Directors and to expect the Board to exercise prudent judgment in its stewardship responsibilities.
- III. To have access to PMIEF’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.
- 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 PMIEF may intend to share.
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

Roles and Responsibilities

The PMIEF Executive Director is responsible for maintaining the database of Donors, to ensure that gifts are acknowledged, Annual Reports are accurate, and that all donor data is handled in accordance with local and federal laws pertaining to the PMIEF’s status as a 501(c)3 organization.

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Instructions

Gift Appreciation:

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 – Will be consistently and appropriately acknowledged within 14 business days of gift receipt.
- Gifts of \$500USD 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, provided the company provides specific donor information.
- 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:

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.

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 PMI or PMIEF publications, provided recognition of donors does not give the appearance in any way of influencing a grant award/program or initiative outcomes. PMI recognized ATPs which donate pro bono training will receive a badge for use of their website showing their support for PMIEF, recognition on the PMIEF website, and in the PMIEF Annual Report.
- Endowed Scholarships – The giving threshold for the naming of an endowed

scholarship is \$25,000 as outlined in the Scholarship Policy. While a donor may be given the opportunity to review the final candidate, PMIEF retains complete autonomy in the final selection.

Related Documents or References

PMIEF Scholarship Policy