AERAC approved 4-15-2021

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| **Community** **Relations,** **Public** **Education** **&**  **Fundraising** **(CRPEF)**  **Organization will establish a self-study committee to assess and rate the organization on the following:** | Supporting Documentation | Review Committee Decision | | |
| Indicate name of file or cite page in documents you provide to show compliance. | Fully Met | Partially Met | Not Met |
| 1. The organization is identifiable and visible within the community. |  |  |  |  |
| 2. The organization conducts public education programs/events that increase the community's awareness of the causes, implications, and prevention of blindness and the potential for individuals who are blind and those who have low vision to participate fully in society. |  |  |  |  |
| 3. The organization conducts a public education initiative that projects an appropriate image throughout its service area and increases the community's understanding of, and support for, its services. |  |  |  |  |
| 4. Written policies are in place for each of the community relations, public education and fundraising activities. |  |  |  |  |
| 5. Written goals, objectives, and plans are established for each of the community relations, public education and fundraising activities. |  |  |  |  |
| 6. Procedures and key metrics are in place to measure the efficiency and effectiveness of community relations, public education and fundraising activities and written evaluation reports based upon established goals, objectives, budget, and plans are prepared and provided to the governing authority. |  |  |  |  |
| 7. Fundraising methods encourage donors to give voluntarily. |  |  |  |  |
| 8. The percentage of collected funds that support the administration of fundraising shall not exceed what is standard for such activities. |  |  |  |  |
| 9. Print, email and electronic solicitations identify the organization and clearly describe the purpose and program for which the solicited funds will be used. |  |  |  |  |
| 10. The organization provides a privacy policy that describes how donor information is collected and used. This policy allows  donors to “opt-out” of making their information available to affiliates or being used by the organization other than for recordkeeping, and provides a method for donors to be removed from mailing, email lists and other social media contact. |  |  |  |  |
| 11. The organization has adopted a policy including the requirement of consent for the use of consumer photos and stories. |  |  |  |  |
| 12. The organization regularly evaluates all fundraising programs and revises its policies, procedures, and publications as necessary to ensure their continuing integrity. |  |  |  |  |
| Total Standards |  | /12 | /12 | /12 |
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Required Documents

Please prepare a folder in Dropbox (or use other means of sharing as mutually agreed with AER) for your organization’s Community Relations, Public Education and Fundraising Self-Study, with sub-folders labeled for each of the following documents:

* Self-Study (above)
* Promotional Materials Used at Community Events
* Branding Materials
* Public Education and Awareness Resources or Event Materials
* Sample Goals, Objectives and Plans for a Community Relations or Public Education Event or Project held within the last 2 years
* Fundraising Policy and Procedures that include Donor Stewardship, Use of Restricted Funds and Conflict of Interest
* Budget for Community Relations and Public Education
* Fund Development Plan
* Website Address
* Press Releases or Other Sources that Highlight Organization
* Logo
* Event or Project Evaluation Report(s)
* Narrative to explain any standard that is partially met or not met.
* Any other Narrative Remarks

List of Members of Self-Study Committee:

Date Self-Study Completed:

Date of Board Meeting approving Self-Study: