AERAC approved 4-15-2021; updated and AERAC approved 11-21-2024

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| **Community** **Relations,** **Public** **Education** **&**  **Fundraising** **(CRPEF)**  Definitions:  Community Relations (i.e. collaborations, partnerships, MOUs, conference participation, civic committees and associations)  Public Education (i.e. social media, newsletters, donor communication, op-eds, interviews, tours, and similar  Fundraising (i.e. Income Generation from any sources identified in the budget)  **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, including website and social media channels; provide a schedule for checking the current accuracy of each. |  |  |  |  |
| 2. For the purposes of Public Education and Community Relations, the organization maintains an accurate and updated list of organizations, sponsors, events and other sources for arranging events and provides progress reports to leadership and the Board on a scheduled basis. |  |  |  |  |
| 3. Marketing activities (see definition below) for fundraising purposes produce quantifiable outcomes in:  a. Number of followers on subscription list (name, address, email address so they receive invitations, e-news, letters, etc).    b. Number of First-time donors resulting from the activity,  c. The Board and leadership receives progress reports.  (definition: live events, email campaigns, on-line/social media campaigns, peer-to-peer fundraising) |  |  |  |  |
| 4. Leadership reviews data analytics from all digital resources (website, social media, email marketing) at least quarterly and takes appropriate action for improvement. |  |  |  |  |
| 5. The budget includes all sources of earned income and philanthropy; the expenses are developed with input from stakeholders (board, staff and C-suite) to meet the needs and strategic goals of the organization. |  |  |  |  |
| 6. The fundraising results must be in alignment with the budgetary goals set by the stakeholders (board, staff, C-suite, auxiliary/volunteers), and progress is reported to the board on a scheduled basis. |  |  |  |  |
| 7. Outcomes for community relations and public education are quantifiable or have appropriate performance metrics to demonstrate their degree of effectiveness. |  |  |  |  |
| 8. Organization shares with donors and implements the principles of the Donor Bill of Rights of the Association of Fundraising Professionals or similar standard, and also shares with donors and maintains a strict privacy policy. |  |  |  |  |
| 9. \*The Board ensures that sufficient funds are generated yearly to compensate all staff in alignment with prevailing ranges in the community. |  |  |  |  |
| 10. All solicitations identify the purpose and program for which the solicited funds will be used. |  |  |  |  |
| 11. The organization requires consent for the use of consumer photos and stories. |  |  |  |  |
| 12. All philanthropic activity adheres to ethical guidelines such as those of AFP, International. |  |  |  |  |
| Total Standards |  | /12 | /12 | /12 |

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
* Suggested but not required for #2—reports from CRM (segmented)

List of Members of Self-Study Committee:

Date Self-Study Completed:

Date of Board Meeting approving Self-Study: