AERAC approved 4-15-2021, updated 2022 and 7-11-2023

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| **Policy** **and** **Administration** **(PA) Self-Study**  **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 legally constituted and authorized to provide services to individuals who are blind and those who have low vision, including those who have multiple disabilities and are deaf blind. |  |  |  |  |
| 2. The organization is guided by a written mission statement that spells out its philosophy of service and program objectives. |  |  |  |  |
| 3. The organization has a written strategic plan with goals and objectives for its management and service functions.  Guidance: show timelines, measurement/assessment, reporting to Board/funders, commitment to program improvement. |  |  |  |  |
| 4. The written statement of core values affirms the organization’s belief in the dignity and rights of individuals who are blind and those who have low vision. |  |  |  |  |
| 5. The organization provides services without regard to race, sexual orientation, religion, additional disabilities, and ethnic origin. |  |  |  |  |
| 6. The organization identifiesin written form the eligibility criteria, geographic area, and populations it serves. |  |  |  |  |
| 7. The organization is an advocate for addressing the unmet needs of populations it serves. Provide evidence of advocacy activities and how unmet needs are identified. |  |  |  |  |
| 8. The organization collaborates with other providers to maximize resources and to minimize duplication of effort. |  |  |  |  |
| 9. Members of the governing boards and advisory committees are chosen in a manner that ensures public representation, diversity, competence, and inclusion of one or more individuals who are blind and those who have low vision.  Guidance: policy on board recruitment and roster showing diversity. |  |  |  |  |
| 10. The governing authority has established policies for the efficient and effective operation of the organization. Policies and procedures are reviewed periodically, and effective date and last date of revision are clearly noted on policies and procedures. |  |  |  |  |
| 11. The chief administrator exercises full responsibility for the day-to-day management of the organization and staff; and is responsible for implementing policies. |  |  |  |  |
| 12. The organization has a written conflict of interest policy for the governing board which includes a conflict resolution procedure. |  |  |  |  |
| 13. The organization maintains an organizational chart which defines the internal structure for efficient and effective administration and delivery of services and defines the lines of authority. |  |  |  |  |
| Total Standards |  | /13 | /13 | /13 |

Required Documents

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

* Self-Study (above)
* Articles of Incorporation and Tax Exemption Letter
* Mission Statement
* Strategic Plan
* Core Values
* Written Policy Regarding Admissions & Service Delivery Equality
* Eligibility Criteria & Service Area(s) Policy
* List of Collaboration Partners & Description of Relationship & Projects
* Policy and Bylaws Regarding Board Nomination Process and Board Composition Requirements
* **Organizational Chart** showing lines of supervision for programs being presented for accreditation.
* **List of Employees** including job title, and certifications and/or licenses.
* Board of Directors and Chief Administrator (Executive Director) Roles & Responsibilities
* Conflict of Interest and Conflict Resolution Policies
* Bylaws or Procedures Relevant to Process Used to Update Policies & Procedures
* 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: