Assessing Your Organization

*A tool for land trusts to conduct a detailed assessment of organizational progress toward implementing the Canadian Land Trust Standards and Practices*

Fee Simple Land Stewardship Workbook

# Acknowledgements

This document was revised and modified based on the U.S. Land Trust Alliance document *Assessing Your Organization* (Revised 2017) and the Canadian Land Trust Alliance document *Assessing Your Organization* (2007) with permission from the Land Trust Alliance. The Ontario Land Trust Alliance would like to thank Environment Climate Change Canada for its financial support toward the development of this document.

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# Checklist of Written Materials, Practices or Procedures

Here are some materials that you may find helpful to review and refer to as you work through this workbook. The items in green link to highest priority practices in the AYO workbook.

Land management plan for each conservation property (12B1)

# Standard 12: Land Stewardship

Land trusts have a program of responsible stewardship for lands held for conservation purposes.

*How well is the land trust meeting this practice?*

*1 = not currently meeting*

*4 = meets or exceeds*

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| --- | --- |
| How many properties does the land trust own? | Click here. |
| How many hectares? | Click here. |
| Notes:Click here. |

## Land Management and Stewardship

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| 1. Develop a written land management plan for each conservation property within 12 months after acquiring the land to:
	1. Identify the property’s conservation values, including any significant cultural, Indigenous, historical and natural features, and identify threats to those features
	2. Identify the overall management goals for the property
	3. Identify activities and timeline to achieve the goals and to reduce any risks or threats to the conservation values
	4. Specify the uses that are appropriate for the property, in keeping with the property’s conservation values, any restrictions and donor or funder requirements
 | Choose an item. |
| Does the land trust have a written management plan for each conservation property that it holds in fee? | Choose an item. |
| If yes, each management plan includes, at a minimum (check all that apply):[ ]  A description of the property (size, location, etc.)[ ]  A description of the conservation values or attributes (the reasons why the land trust protected this property)[ ]  Overall management goals[ ]  Activities to achieve management goals and reduce any risks or threats to the conservation values[ ]  Identification of permitted uses or activities appropriate for the property, including public access |
| If no, does the land trust have a plan for completing a management plan for those without them? | Choose an item. |
| Notes:Click here. |
| Does the land trust complete management plans within 12 months of acquisition of each property? | Choose an item. |
| Notes:Click here. |
| Does the land trust evaluate each property for public access opportunities? | Choose an item. |
| Notes:Click here. |
| Describe the process the land trust uses to develop management plans:Click here. |
| Notes:Click here. |
| 1. Manage each conservation property in accordance with its management plan, and review and update the plan periodically
 | Choose an item. |
| Does the land trust manage each property in accordance with its management plan? | Choose an item. |
| Notes:Click here. |
| How often does the land trust review and update its management plans? | Click here. |
| Notes:Click here. |
| Are management plans updated following significant changes to the conservation values or natural features? | Choose an item. |
| Notes:Click here. |
| 1. Perform administrative duties (such as paying insurance, filing required forms, keeping records) in a timely and responsible manner
 | Choose an item. |
| Does the land trust anticipate the time necessary to accomplish administrative obligations and make them regular practices? | Choose an item. |
| Notes:Click here. |
| 1. Maintain the property in a manner that retains the land trust’s public credibility, manages community expectations and minimizes risk consistent with the land trust’s mission
 | Choose an item. |
| Does the land trust maintain its conservation priorities responsibly, even if its ownership is of a short duration? | Choose an item. |
| Notes:Click here. |

## Inspecting Land Trust Properties

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| 1. Determine the boundaries of land trust properties and physically mark them to the extent possible or necessary
 | Choose an item. |
| Are the boundaries of each of the land trust’s fee properties marked in such a way that corners and property lines can be identified on the ground to the extent possible or necessary for purposes of inspection and enforcement? | Choose an item. |
| If no, how many properties have boundaries that are not marked (as described above)? | Click here. |
| Notes:Click here. |
| 1. Inspect properties at least once per calendar year for potential management problems and promptly document the outcome of the inspection
 | Choose an item. |
| Does the land trust inspect all of its fee properties on an annual (or more frequent) basis? | Choose an item. |
| If yes, for how many consecutive years has the land trust inspected all of its properties on an annual basis? | Click here. |
| Notes:Click here. |
| Is the inspection documented in writing? | Choose an item. |
| If yes, each inspection report includes, at a minimum (check all that apply):[ ]  Inspection date[ ]  The property inspected[ ]  Name of the inspector[ ]  Observations related to the property’s condition and conservation values[ ]  Observations related to the ongoing management of the property[ ]  Observations related to any potential conservation property ownership challenges including significant trespass, encroachments and adverse possession claims[ ]  Photographs and maps, as appropriate |
| Notes:Click here. |
| Does the land trust promptly complete the inspection report following the inspection visit? | Choose an item. |
| Notes:Click here. |
| Does the land trust use a template property inspection report? | Choose an item. |
| Notes:Click here. |
| 1. Address management problems, including encroachments, trespass and other ownership challenges, in an appropriate and timely manner and document the actions taken
	1. For lands that have been certified as an ecological gift, report detected changes or impacts to the natural features of the property to Environment and Climate Change Canada
 | Choose an item. |
| Describe a recent management issue on a fee-owned conservation property and how the land trust addressed the issue:Click here. |
| Notes:Click here. |
| For all conservation property ownership challenges, the land trust’s actions (check all that apply):[ ]  Are timely[ ]  Are professional and focused on the facts and appropriate resolution[ ]  Are consistent with the protection of the conservation values and comply with any restrictions on the property[ ]  Do not result in private inurement or impermissible private benefit[ ]  Are appropriately documented |
| Notes:Click here. |
| Does the land trust have any unresolved management issues on fee-owned properties that would threaten the property’s important conservation values? | Choose an item. |
| If yes, please describe the nature of the issue(s) and the steps being taken to resolve the management issue(s):Click here. |
| Notes:Click here. |

## Contingency Strategy

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| 1. Establish a contingency plan for conservation lands in the event the land trust ceases to exist or no longer own or manage them
 | Choose an item. |
| Does the land trust have a contingency plan for all of its fee properties? | Choose an item. |
| Notes:Click here. |
| To ensure that a contingency holder will accept the land, are completed files and adequate stewardship funds available for transfer? | Choose an item. |
| Notes:Click here. |

## Expropriation

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| 1. If a conservation property is threatened with expropriation:
	1. Work diligently to avoid a net loss to conservation values and document the actions taken
	2. Provide prompt notification to relevant parties, including expropriating authority and Environment and Climate Change Canada, if the conservation land is certified as an ecological gift
 | Choose an item. |
| Has the land trust ever faced expropriation action affecting one of its conservation properties? | Choose an item. |
| If yes, the land trust (check all that apply):[ ]  Took steps to avoid or mitigate harm to the conservation values[ ]  Took steps to secure the appropriate compensation for the rights expropriated[ ]  Documented all actions taken in connection with the expropriation action[ ]  Used any proceeds in a manner consistent with the land trust’s mission |
| Notes:Click here. |

# Setting Priorities

Based on what you have learned about your land trust’s implementation of these fee simple land conservation practices, please complete the following list.

Our organization’s fee simple land conservation strengths are:

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| 1. Click here.
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| 1. Click here.
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| 1. Click here.
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Our greatest fee simple land conservation challenges are:

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| 1. Click here.
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| 1. Click here.
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| 1. Click here.
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Some specific steps we will take over the next one to three years toward overcoming the challenges are:

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| 1. Click here.
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| 1. Click here.
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| 1. Click here.
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