

S&P Assessment Tool N&P Outil d'évaluation

USER MANUAL

Introduction

The Alliance of Canadian Land Trusts, Land Trust Alliance of British Columbia, Ontario Land Trust Alliance and Le Réseau de Milieux Naturels protégés have partnered to develop a national self-assessment tool for land trusts. This tool is a voluntary program that will help land trusts develop capacity and ensure governance and operations follow best practices.

The Alliances will not assess land trusts or their progress through self-assessment. The Centre for Land Conservation holds the rights to the Canadian Land Trust Standards & Practices and is developing a program to assess performance.

This tool is designed to help build capacity and to guide land trusts to achieve best practices whether they are a volunteer run organization or a land trust with both volunteers and staff. Alliances will provide resources and educational opportunities related to the Standards & Practices and will offer support to land trusts using this tool.

The self-assessment tool is free to land trusts, and is designed to allow you to work at your own pace and within the capacity of your organization.

This web-based assessment tool is a voluntary program to help build land trust capacity and excellence.

Overview

This Collection of Best Practices, Resources and Template Documents is listed in the order of the 12 Canadian Land Trust Standards & Practices.

Sample documents and templates have been provided by leading land trusts across Canada and represent resources to help your organization as it develops policies and guidelines. These are being continuously updated.

Successful land conservation has resulted in the public, government, and private agencies requiring assurances that land trust's practices conform to professional standards that they can rely on. Thus, this collection is catalogued according to the most recent versions of the updated Canadian Land Trust Standards and Practices, (2019) Centre for Land Conservation.

Sources

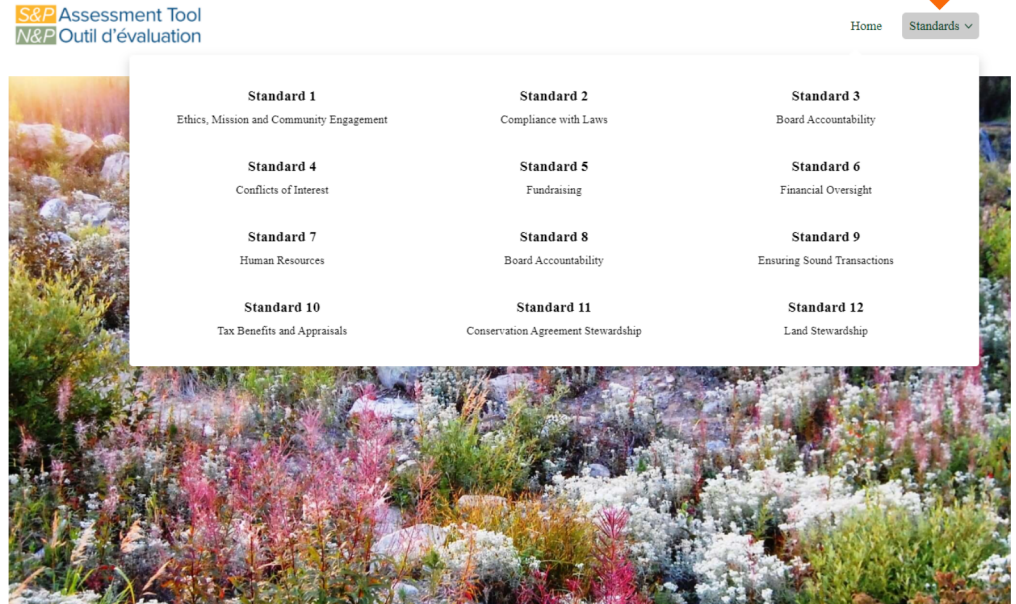
Note that the sources of most of the documents are plainly identified within them. We have sought permission from any outside sources, and thank all those who generously provided their work for others to use and share. We hope that further editions of this collection will be available based on continued input of template documents and research from our members and associated organizations.

This Assessment Tool is designed to help land trusts assess, update, and find associated laws, sample documents and policies that they can use to work toward full compliance with the Canadian Land Trust Standards & Practices.

Viewing Standards and Practices

The Standards and Practices can be accessed in two different areas of the website

The first method is to locate the **Standards** menu in the top right corner of the website. Hovering the cursor over this menu to bring up a drop-down menu of all Standards sections. Clicking on a Standard within this menu will take you to an overview of that section, and list all the Practices associated with the selected Standard.



The second method is to **scroll down** on the Homepage until you locate the **grid menu** displaying the Standards and Practices. This menu lists all Practices associated with each Standard, which is particularly useful if you are trying to navigate to specific topics. You can select a Standard or any of the individual Practices listed to navigate to specific areas of the website.

Above the grid menu you will see the **Search Standards Documentation** toolbar, which allows you to search all Standards and Practices documentation, enabling the use of **keywords** to quickly locate specific information within the Standards and Practices.



Acknowledgments

The BC Assessment Tool was developed in 2009 by The Land Trust Alliance of British Columbia LTABC. In 2023, LTABC partnered with The Alliance for Canadian Land Trusts, the Ontario Land Trust Alliance and Le Réseau de Milieux Naturels protégés to update the self-assessment tool with a national and bilingual format.

Funding for this project was generously provided by Environment & Climate Change Canada, The Land Trust Alliance of BC and The Alliance for Canadian Land Trusts.

Sample Board Resolution

Alliances encourage member land trusts to accept the Canadian Land Trust Standards and Practices as the guiding principles for their operations, indicating their commitment to upholding the public trust and to the credibility of the land trust community as a whole. The Alliances encourage all land trusts to go beyond accepting the guidelines by implementing the Canadian Land Trust Standards and Practices at a pace appropriate for the size of their organization and scope of its protection activities. Through a Board resolution, land trusts are asked to accept the statement of the Canadian Land Trust Standards and Practices as guiding the practices of the organization, and to make a commitment to making continual progress toward implementation of the standards and practices. When a land trust passes a board resolution adopting Canadian Land Trust Standards and Practices it should send a copy to the appropriate land trust alliance. LTABC and OLTA have sample Board resolutions available for land trusts to use.

Limitation of Liability and User's Responsibility

All information in this Collection is provided "as is" and no representations, warranties or conditions, either expressed or implied, are made in connection with the use of, or reliance upon, this information. Legislative, tax and other information changes over time, and thus the user is advised in all cases to seek legal and financial advice independently. Much of this information has been reproduced with permission from other sources; its accuracy and completeness is not guaranteed. It is provided to you as the user entirely at your own risk.

This online Self-assessment tool (SAT) © was developed in 2009 and revised and modified in 2024 by The Land Trust Alliance of British Columbia based on the Canadian Land Trust Standards & Practices which was developed in 2007 by the Canadian Land Trust Alliance and revised in 2019 by the Centre for Land Conservation. The Land Trust Alliance of British Columbia would like to thank The Alliance of Canadian Land Trusts and Environment Climate Change Canada for its financial support toward the 2024 revision of this online assessment program.

Reprinting or use of copyrighted Self-Assessment Tool (SAT) © for uses other than distribution to land trust board and staff requires permission from the Land Trust Alliance of British Columbia. The Canadian Land Trust Standards & Practices are the property of the Centre for Land Conservation and any use or distribution must be directed to them separately.

Clicking on a Standard will load a list of associated Practices and give a brief description of the selected Standard. Other Standards can be quickly navigated to by making selections in the **Standards Index** menu on the right side of the page.

Log In for Full Access! [Login](#)

Standard 1: Ethics, Mission and Community Engagement

Land trusts maintain high ethical standards and have a mission committed to conservation, community service and serving the public interest[1]. A land trust has the responsibility to act in ways that benefit public rather than private interests. Everyone connected with a land trust's governance should have a similar understanding of the organization's mission in the event that the group is asked to take on programs and transactions that further individual interests but that do not advance the public purposes for which the land trust was organized. Land trust goals and programs implementing the mission may change over time, but change should be a deliberate decision. In establishing its mission, goals and programs, the land trust should reflect the needs and priorities of its constituency. Support from the community is essential for sustaining conservation over time, meeting conservation goals, defending conservation actions and obtaining financial support. [1]In this context, serving the public interest is understood as benefitting the public in general or a sufficient segment of the public, as opposed to conferring private benefits to individuals, corporations or a limited group of persons.

A. Ethics

A. Ethics Background The land trust upholds high ethical standards through being inclusive and through honesty, openness, transparency, fairness, integrity,...

B. Mission, Planning and Evaluation

Background These are the "planning practices" and specify the need for a clear mission statement and a process, such as...

C. Community Engagement

Background The land trust communicates its mission, goals and/or programs to members, donors, landowners, the public, community leaders, conservation organizations...

Standards Index

- Standard 1: Ethics, Mission and Community Engagement
- Standard 2: Compliance with Laws
- Standard 3: Board Accountability
- Standard 4: Conflicts of Interest
- Standard 5: Fundraising
- Standard 6: Financial Oversight
- Standard 7: Human Resources
- Standard 8: Evaluating and Selecting Conservation Projects
- Standard 9: Ensuring Sound Transactions
- Standard 10: Tax Benefits and Appraisals
- Standard 11: Conservation Agreement Stewardship
- Standard 12: Land Stewardship

Creating a User Account and Logging in

To log in with your user account, click the **Login** link located in the top right corner of the website.

There is an additional option to log in using the **Login** button located at the top of each Standards and Practice article that will be present if a user has not yet logged in.

Click on a login link to enter your user details in the Login window located in the upper right corner of the screen. Click the **Log In** button below your user details to proceed.

Contact EN FR | [Login](#)

S&P Assessment Tool
N&P Outil d'évaluation Home Standards ▾

Home > Standard 1: Ethics, Mission and Community Engagement Q Search Documentation

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Standards Index

- Standard 1: Ethics, Mission and Community

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Username or Email:

Password:

[Log In](#)

[Lost your password?](#)

Using the Dashboard and Form Tab

Logging in allows you access to your user **Dashboard**, as well the **Form** tab used for submissions. As you navigate through each of the Practices within a Standard, you can select the **Form** tab to make submissions related to each Practice. Use these forms to enter your organization’s information and upload documentation regarding each Practice. Completing the forms will guide you through a self-assessment process for your organization and assist in developing planning strategies or to discovering areas your organization could be improved upon.

Using the Form Tab

The **Form tab** can be used to track progress in the application of Standards and Practices.

Fill out each of the fields in the form and upload relevant files by clicking on the **Choose Files** button and selecting the related documents on your computer. When uploads are complete click the **Submit** button to submit your form and uploaded documents.

Home > Standard 1: Ethics, Mission and Community Engagement > A. Ethics

A. Ethics

A. Ethics **Form**

Date

Action Item

Current Policy Supporting Mission, Planning, and Evaluation

Compliance Level: Incomplete Priority: High

Choose Files No file chosen File Upload

Files Allowed *.pdf,*.jpg,*.jpeg,*.png,*.ppt,*.pptx,*.doc,*.docx,*.xls,*.xlsx,*.csv

Please add the appropriate prefix to ALL file names, example: "Standard1A_..." "Standard3C_..." Make sure to include an underscore before the remainder of the file name.

WE ARE WILLING TO SHARE THIS POLICY. *

Submit

No files uploaded.

Permitted File Types

File types permitted for submission include: .pdf, .jpg, .jpeg, .png, .ppt, .pptx, .doc, .docx, .xls, .xlsx, .csv

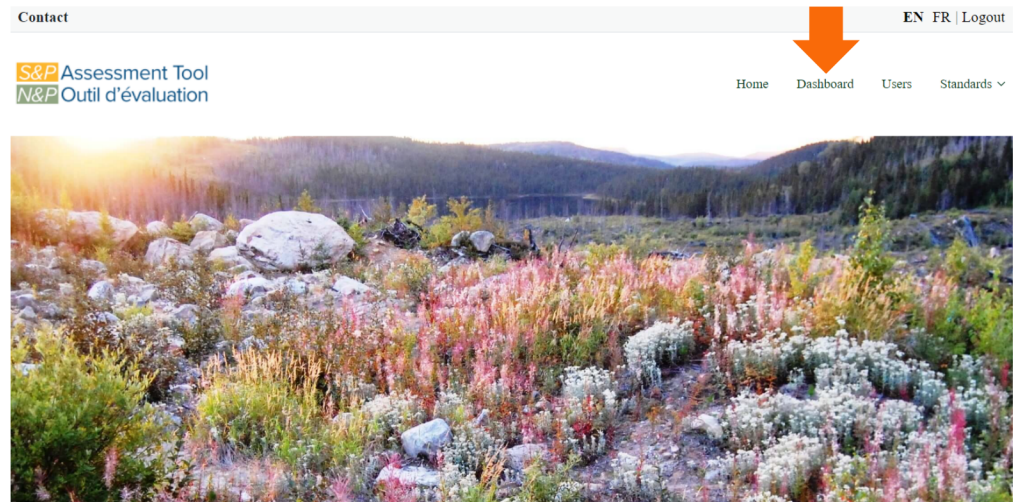
It is recommended to add the associated prefix to all file names uploaded so files will be organized effectively and easy to locate.

Appropriate prefix Example: "Standard1A_..." for form submissions under Standard 1.A – Ethics.

It is recommended to include an underscore before the remainder of the file name. Examples: "Standard1A_revised2024.docx", "Standard1A_presentation2024.ppt", "Standard1A_final2024.pdf"

Using the Dashboard to view Form Submissions

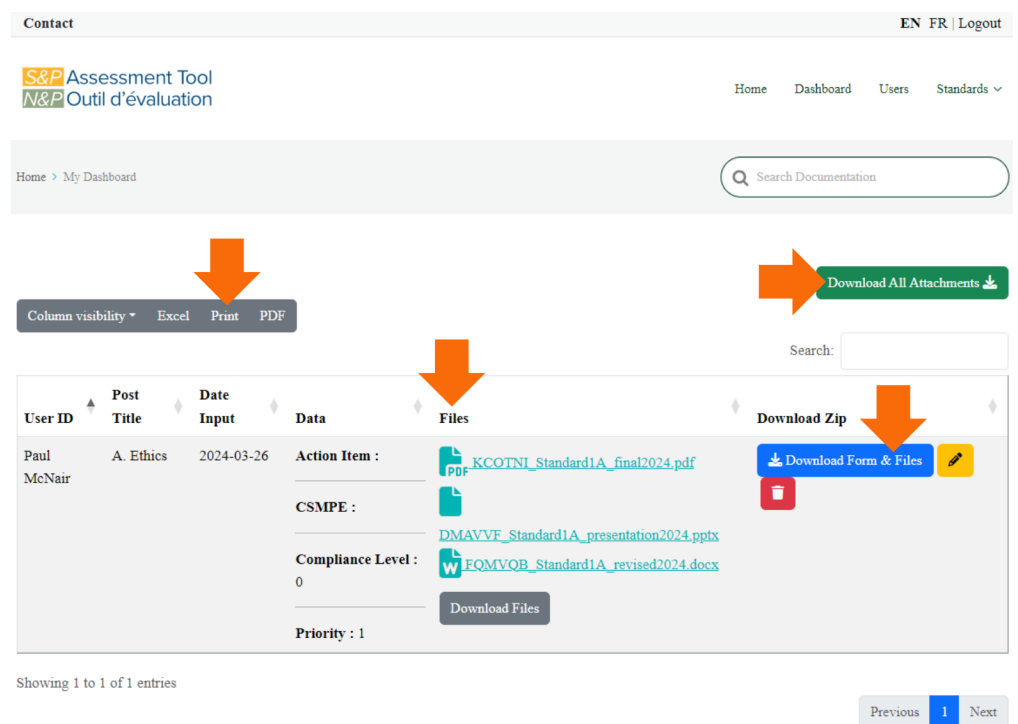
To review your submissions, click on the **Dashboard** menu located in the upper right. Here you will find all of your form submissions and associated file uploads available for viewing or for download.



Files can be viewed or downloaded individually by clicking on the documents listed under **Files**.

Files can also be download as a collection in a compressed .zip file format by clicking on the blue **Download Form & Files** button for all documents pertaining to a specific practice, or by clicking on the green **Download All Attachments** button to download all files uploaded as an entirety.

Options to **Print** or export dashboard submission data as a **Excel** spreadsheet or **PDF** are available in the menu on the upper left.



Benefits of completing a Self Assessment:

- Understand the best practices used to achieve excellence in governance and conservation.
- Develop efficient planning and compile a detailed information resource to support decision making.
- Build a strong framework for recruiting outstanding board members, staff, and volunteers.
- Facilitate strong leadership, promote program improvements, and adherence to industry standards.
- Foster team building, staff development, and organizational excellence.
- Maximize the effectiveness and efficiency of internal processes.
- Promote the stability and longevity of your organization.
- Create a secure record of your organizations progress and files.