Policy Checklist

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

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We recommend organizing your current policies before beginning the self-assessment process. It is helpful to collect and organize your land trusts' policies into groups before you proceed with an assessment. The checklist below presents the core policies, procedures and guidelines that are often required to achieve full compliance with the Standards and Practices. Please note, some land trusts may have additional policies that go beyond the requirements of the Standards and Practices criteria.

Category	Policy	Standard/Practice
Governance		
	☐ *Code of ethics and/or values statement*	1A
	☐ *Whistleblower policy*	1A
	☐ *Procedures for recruiting and training board members*	3B
	☐ *Expectations for board service*	3C
	☐ *Conflict of interest policy*	4A
	☐ *Contracts for consultants and contractors*	7C
	☐ *Transition process or plan*	7D
	☐ *Job descriptions for each staff member*	7E
	☐ *Personnel policies if the land trust has staff*	7E
	☐ *Records policy*	9G
Finance		
	☐ *Policies or procedures for the responsible and prudent investment, management and use of financial assets*	3A
	☐ *Acknowledgment of all gifts, including land and conservation agreements*	5B
	☐ *Policy or procedure to ensure donor privacy concerns are honored*	5B
	☐ *Internal controls and accounting procedures*	6D
Transactions		
	☐ *Policies or bylaws provisions that define limits to the delegation of decision-making authority if the board delegates decision-making authority on transactions*	3D
	☐ *Full board notification of any completed transactions if the board delegates decision-making authority on transactions*	3D
	☐ *Donor acknowledgment of the land trust's intent to sell before acquiring non-conservation real property*	5D
	☐ *Land and conservation agreement project selection process*	8B
	☐ *Project selection criteria*	8B

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Category		Policy	Standard/Practice
Transactions (continued)			
	☐	*Partnership agreements for joint acquisitions, long-term stewardship project or when co-holding conservation agreements*	8E
	☐	*Recommendation that each party to a land or conservation agreement transaction obtain independent legal, financial and tax advice*	9B
	☐	*Landowner notification for those who may claim a federal or provincial income tax deduction or credit*	10A
	☐	*Baseline documentation report descriptions*	11B
Fee Simple Land Stewardship			
	☐	*Land management plan for each conservation property*	12B
Conservation Agreement Stewardship			
	☐	*Conservation agreement monitoring policy and/or procedure*	11C
	☐	*Information about the conservation agreement and the land trust's stewardship policies and procedures for new owners of conservation agreement land*	11D
	☐	*Conservation agreement enforcement policy and procedures for responding to violations*	11E
	☐	*Procedure for responding to landowner required notices or requests for interpretation or approvals if not specified in the conservation agreement deed*	11F
	☐	*Procedure to guide decision-making regarding approvals and permitted rights*	11F
	☐	*Conservation agreement amendment policy*	11H
	☐	*Land management plan for each conservation property*	12B