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*

Introduction

# 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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# Introduction

OLTA’s Assessing Your Organization Program (AYO) is intended to help strengthen land trusts through a systematic review and discussion of their governance and operating practices in light of the 2019 Canadian Land Trust Standards and Practices (CLT S&Ps).

The AYO was designed for land trusts and other groups that wish to undertake an analysis of their progress toward implementing the CLT S&Ps. The AYO process helps land trust boards meet legal requirements and regulations, recruit and train excellent board members, set priorities for organizational development, as well as secure land efficiently and effectively for conservation and protection.

General information on the CLT S&Ps and related OLTA and OLTA member publications can be found on OLTA’s website. The Assessing Your Organization program was adapted for Canadian land trusts from the Land Trust Alliance’s AYO Program. The LTA has created a short course to support the AYO and how best to use it.

# WHY COMPLETE THE AYO?

Completing the AYO provides a land trust with a snapshot in time of which practices are currently being implemented and what needs improvement or who needs additional education. The AYO includes rankings for each of the practices followed by a series of questions to help a land trust determine where the organization currently falls on a scale of 1 to 4. It is likely that no one person in the organization will know all the information needed to respond independently to all assessment items. Sharing information and knowledge through discussion and dialogue will help members of the organization gain greater knowledge about its operations. Together, land trust personnel can develop a pathway to implement identified changes in practices and celebrate strengths and accomplishments.

To capture the priorities identified through the assessment, each section ends with a “Setting Priorities” section to summarize organizational strengths, weaknesses, and action areas. Organizations may decide to incorporate action steps into organizational strategic and annual plans, and conducting a reassessment approximately every three years. The completed assessment forms will provide an invaluable record of the organization’s growth and development.

# WHO SHOULD COMPLETE THE AYO?

For all-volunteer and small staffed land trusts, the AYO is best completed by the full board (and staff) with the aid of OLTA or other provincial alliance staff or trained AYO Coordinators. Completing the entire assessment can take time – several hours or several days – depending on the amount of advance preparation and the detail and depth of discussion during the assessment meeting(s).

Land trusts with larger staff use several approaches to complete the AYO. Some choose to have staff complete the assessment first and then share the results with the board in a facilitated discussion. In other organizations, the board may review or complete the assessment along with staff. If the board has active committees, each committee may review and report on those standards most applicable to their committee. Those organizations with a very large staff and multiple departments may choose to have a staff leader who delegates completion of specific sections to an appropriate staff person. Because the board has oversight responsibility for the land trust’s operations, its review and consideration of the final assessment report is strongly recommended. The time needed to complete the assessment and to permit board review will vary tremendously.

# HOW TO COMPLETE THE AYO

## Prepare

The AYO assessment asks participants to reflect on governance, finance, transactions and stewardship practices, including written policies and procedures. It is helpful for participants to have access to key organizational documents (see AYO Checklist at the beginning of each workbook). Preparation will vary depending on the assessment sections or CLT S&Ps the organization elects to complete.

## Complete

You can complete the AYO following the CLT S&Ps in numerical order. Alternatively, practice elements are grouped into four separate assessment sections – governance, finance, transactions and stewardship (with separate sections on conservation easement stewardship and fee simple land stewardship), which more closely mirror how land trusts conduct their work. If you work through the AYO in this format, you will notice some practices appeared to have been left out. This is because they are included in a different section. The varying formats allow an organization the flexibility to complete the assessment sections all at once or one at a time.

The AYO identifies core practice elements in green font.

Each participant should answer the questions as honestly as possible and from the individual’s viewpoint of how the organization is implementing the practice today. There isn’t a right or a wrong answer.

The AYO includes rankings for each of the practices and participants are asked to select:

* 1 – not currently meeting the practice
* 2 – sometimes meets the practice
* 3 – usually meets the practice
* 4 – meets or exceeds the practice
* Unsure

When selecting the number, consider the practice carefully as it is written. Sometimes an organization can have written policies, procedures and guidelines but might not implement each element all the time or in accordance with those policies. For most questions, participants also have the option to indicate “unsure.” This is an acceptable and helpful response and can lead to important discussions or identify training needs.

There are also open-ended questions for many of the practices. Participants are encouraged to be as specific as possible. Following each practice, there is an opportunity for general comments to provide additional information, ask questions or share insights. Following each CLT S&P or grouping of CLT S&Ps, there is an opportunity to reflect on strengths, challenges and priorities.

## Analyze

After the organization or individuals complete the assessment, review the responses. The review can be approached in various ways. All-volunteer or smaller staffed organizations may elect to bring all participants together and review the assessment collectively. Together, the group can celebrate its successes and determine the gaps and needs to improve their implementation of the CLT S&Ps. For larger staffed organizations, a team of individuals may review the responses and determine the priorities to share with others for discussion and planning. This process can take time and require several meetings to complete the work.

When evaluating across each participant’s assessment, there may be a wide range of answers that do not align. This is normal and may be based on the participant’s role in the organization. A board member may not fully understand staff procedures, or a person responsible for project due diligence may not know the protocol for implementation of a conflict of interest policy at a board meeting. When responses don’t align, they are opportunities for discussion, awareness and education.

# AFTER THE ASSESSMENT

Once the assessment is complete, it is helpful to prepare a plan and determine the organization’s resources and training needs.

## Implementation Plan

We recommend incorporating action steps into organizational strategic and annual plans and conducting a reassessment approximately every three years. The completed assessment forms will provide an invaluable record of the organization’s growth and development.

## Training and Resources

Once areas for improvement have been identified through the AYO, a land trust can take advantage of the resources available on OLTA’s [S&P Library](https://olta.ca/standards-practices-resource-library/) and webinars for [Education and Training](https://olta.ca/what-we-do/education-and-training/). The Land Trust Alliance’s [Learning Center](https://tlc.lta.org/topclass/topclass.do?expand-esdUserWelcome) offers webinars, other training, and hosts discussion forums where you can get your questions answered.

For more information and/or assistance in using *Assessing Your Organization*, please contact OLTA ([admin@olta.ca](mailto:admin@olta.ca)).

Thank you for your commitment to excellence in conservation!

# Helpful Resources

Government of Canada. 2018. External resources for charities. <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/external-resources-charities.html#prvncl>

Government of Canada. 2018. Financial statements. <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/financial-statements.html>

Government of Canada. 2019. Fundraising by registered charities. <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/fundraising-registered-charities-guidance.html#toc2>

Government of Canada. 2018. T3010 charity return – Overview. <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/t3010-charity-return-overview.html>

Government of Canada. 2020. What is a related business? <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/policy-statement-019-what-a-related-business.html#toc4>