

Standards and Practices

INTRODUCTION TO

Assessing Your Organization

Do you want to take your land trust to the next level of excellence? Ensure your projects and your land trust are prepared for the future? Implementing *Land Trust Standards and Practices* (the Standards), the ethical and technical guidelines for the responsible operation of a land trust, is the best way to ensure that your conservation projects — and the larger land conservation movement — will stand the test of time. But how do you know where to start? You start, with an assessment of your organization.

Assessing Your Organization (the AYO) is a series of assessment tools designed to complement the 2017 Standards. While there are many different types of assessments, we designed the AYO for land trusts and other groups that wish to evaluate their progress toward implementing the Standards.

General information on the Standards and related Land Trust Alliance publications can be found on the [Alliance website](#). Alliance member land trusts and affiliates can find additional information, such as details about each practice and how land trusts can meet them, on the [Learning Center](#).

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 will help members of the organization gain greater familiarity about its operations. Together, land trust personnel can develop a pathway to implement identified changes in practices and celebrate strengths and accomplishments.

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 an experienced land trust professional. 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 questions ask 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. Preparation will vary depending on the assessment sections or Standards the organization elects to complete.

Complete

You can complete the AYO following the Standards and practice elements 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 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. Never fear, they are simply 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 practice elements that are also accreditation indicator elements, Terrafirma eligibility requirements or both. The accreditation indicator elements are identified in **blue** font, and additional information on the requirements for accreditation is available from the **Land Trust Accreditation Commission**. The Terrafirma eligibility requirements are identified in **green** font; land trusts can find more information about Terrafirma on the **Terrafirma website**. Those practice elements that are both accreditation indicator elements and Terrafirma eligibility requirements are identified in **red** 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
- ? – don't know

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 "don't know." 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 Standard or grouping of Standards, 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 Standards. 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.

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 the Learning Center, the most current, authoritative and comprehensive information on private land conservation, to improve its practices. The information on the Standards includes detailed background narratives on each practice, online courses and sample policies and other materials from land trusts. The Learning Center also hosts discussion forums where you can get your questions answered. The Land Trust Alliance also offers [webinars](#) and other trainings, including [Rally](#), an annual conference that is the largest gathering of conservationists in the nation. [Find an Expert](#) and [RFP Depot](#) are good places to find experts ready to assist you in implementing the Standards.

Accreditation

The Land Trust Accreditation Commission, an independent program of the Land Trust Alliance, does not require an applicant seeking first-time accreditation or renewal to complete an assessment.

However, we *strongly recommend* an assessment against the full suite of the Standards to identify readiness to complete a successful accreditation application. The AYO is one tool available for this purpose. Accreditation is a process of continuous improvement and periodic assessments support this process.

For more information and/or assistance in using *Assessing Your Organization*, please contact the Land Trust Alliance program in your region or send an email to SandP@lta.org.

Thank you for your commitment to excellence in conservation!