

Santa Fe Conservation Trust

Policies and Procedures Manual

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Number	Document	Adopted	Updated	Reviewed
Chapter 1 - Organizational Documents				
1.1	Mission & Vision Statements		5/14/2019	
1.2	501(c)3 Determination Letter	4/30/1998		
1.3	Certificate & Articles of Incorporation	12/17/1993	1/24/2011	
1.4	Bylaws	12/17/1998	10/17/2019	
1.5	Standing Committee Charters			
1.5.1	Governance & Nominations		4/9/2022	
1.5.2	Finance & Audit		4/9/2022	
1.5.3	Land Review		4/9/2022	
1.5.4	Trails & Community Conservation		4/24/2018	
1.5.5	Marketing & Development		4/16/2019	
1.6	Strategic Plan		10/26/2021	
Chapter 2 - General Management Policies				
2.1	Conflict of Interest Policy	2/4/2012	12/4/2018	
2.2	Equal Employment Opportunity	10/26/2004	12/4/2018	
2.3	Harassment Policy	8/4/2009	12/4/2018	
2.4	Whistleblower Policy	unknown	12/4/2018	
2.5	Donor Privacy Policy	7/25/2017		
2.6	Public Issues Policy	7/29/2014	12/4/2018	
2.7	Board Member Recruitment	7/6/2011	4/24/2018	
2.8	Directors Succession Plan	3/10/2016		
2.9	Executive Director Succession Plan	12/1/2015		
2.10	Employee Manual	1/1/2014	8/23/2022	
Chapter 3 - Fiscal Management Policies				
3.1	Recordkeeping Policies and Procedures	7/19/2011	4/24/2018	
3.2	Investment Policy Statement	4/7/2015	10/15/2019	
3.3	Gift Acceptance Policies and Guidelines	12/1/2011	4/24/2018	
3.3-1	Appendix A: Gifts of Non-Conservation Real Estate	7/7/2015		
3.3-2	IRS Publication 561 - Determining the Value of Donated Property			
3.3-3	IRS Publication 526 - Charitable Contributions			
3.4	Revenue Recognition Procedures	4/29/2008		
3.5	Cash Receipts Procedures	7/11/2012	2/26/2020	
3.6	Cash Disbursement Procedures	7/11/2012	2/26/2020	
Chapter 4 - Land Conservation Policies				
4.1	CE Project Selection Criteria	7/23/2013	10/19/2017	
4.1-1	CE Project Selection Criteria Form			
4.2	Baseline Documentation Policy	1/19/2013	10/15/2019	
4.3	Potential Landowner Engagement	7/19/2011		
4.4	CE Fee Stewardship & Defense Contribution Policy	1/31/2012	10/19/2017	
4.4-1	CE Preparation Cost Estimate with LCIA	10/19/2017		
4.4-2	CE Preparation Cost Estimate no LCIA	10/19/2017		
4.5	CE Monitoring Policy & Procedures	12/1/2011	8/7/2018	
4.6	CE Amendment Policy	4/16/2013	10/19/2017	
4.7	CE Violation Policy & Checklist	4/17/2013	12/4/2018	
4.8	Fee Property Acquisition Policy	1/19/2013	10/19/2017	
4.9	Fee Property Stewardship Policy	1/19/2013	12/5/2017	
4.10	Board Approval of Transactions	4/8/2014		
4.11	Archaeological Procedures	10/25/2016		
4.12	Policy for Uses & Activities	8/25/2020		
4.13	Appraisal and IRS form 8283 Policy	10/26/2021		

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Archived Legacy Policies

DC HC Number	Document	Adopted	Updated	Repealed
4.4	Landowner Commitment Contribution Policy	12/21/2006		12/2/2011
	Note: This policy was replaced by the CE Fee, Stewardship & Defense Policy in 2011			
2.6	Policy Clarifying the Term Limits of Directors	4/17/2012		10/23/2018
2.7	Board Member Responsibility Guidelines	Not a policy, never adopted		
2.8	Policy on Executive Director Compensation	12/1/2011		10/23/2018