Workshop Overview

• Introductions
• Background & Impact
• Application process
• Start Your Plan
• Tools and Resources
Introductions

• Your name
• Your organization’s name
• The year your land trust needs to renew; if unknown, the year it was most recently accredited
• Your biggest, burning question
Background
Land Trust Accreditation Commission

- Independent program of the Land Trust Alliance
- 19 diverse volunteer commissioners
- 7 staff
Separate Roles

- Sets *Land Trust Standards and Practices* (last updated in 2017)
- Sets accreditation indicators
- Provides general training and educational materials
- Verifies implementation of *Land Trust Standards and Practices* (via indicator elements)
- Develops accreditation application, review process, and requirements, plus associated training
- Makes accreditation decisions
Accredited Land Trusts

• 436 accredited organizations
• 46 U.S. states and territories
• Accredited land trusts hold almost 80% of conservation land and easements held by land trusts
• Founded between 1891 - 2015
Land Trust Standards and Practices Revision
Standards Revision Completed

Thank you for your feedback! The Land Trust Alliance board approved the 2017 edition of Land Trust Standards and Practices at its February board meeting — download the final version (available en español and en français). All Alliance member land trusts must adopt the revised Standards as part of their annual membership renewal beginning with those who are renewing their membership in June 2017.

Highlights of What's New and What to Expect

Here's a brief summary of what's new, what to expect and where to find more information.

Wondering what happened to a practice (or part of a practice) from the 2004 version in the 2017 revised Standards? See this crosswalk comparison for help.

Resources
<table>
<thead>
<tr>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NEW RENEWAL APPLICATION</strong></td>
</tr>
</tbody>
</table>

Renewal applicants use new electronic application that conforms to revised Standards. First-time applications will not be accepted in this year.

To ensure all 2020 first-time applicants have advance notice, the new electronic first-time application will be published in summer 2019.

### Current Status

**Requirements Manual** finalized and in use by applicants

- Download: [www.landtrustaccreditation.org/2018rm](http://www.landtrustaccreditation.org/2018rm)
- Webinar: [www.landtrustaccreditation.org/webinar](http://www.landtrustaccreditation.org/webinar)
- Rally Session B02

**New electronic renewal application available and used by renewal groups in 2019 onward; reference copy available**

**New electronic first-time application used in 2020 onward; reference copy published summer 2019**
Renewal application process
Similarities and Differences with First-Time

• Structure is the same:
  – Questionnaire, Attachments/Statements
  – Schedule of Dedicated and Restricted Funds
  – Land Conservation Project List
  – Project Documentation
• Review by team of staff and commissioners
• Focus is on work over the accredited term
Renewal Process Overview

Total time to decision: **about 10 months** after application is submitted

- **Applicant Receives Login & Registers**
  - Register within 1 mo. of pre-app due date

- **Applicant Submits Pre-Application**
  - ~3 mos. prior to app due

- **Applicant Receives Project Selection, Fee & Attestation Verification Request**
  - ~2 mos. prior to app due

- **Applicant Submits Application & Fee**
  - On or before app due date

- **Commission reviews the application materials**
  - Timing dependent upon position on review schedule

- **Applicant Receives Additional Information Request (AIR)**
  - ~1-4 mos. after app due date

- **Applicant Submits Additional Information**
  - Due ~3 mos. after AIR received

- **Commission reviews additional documentation and makes final decision**
  - Timing depends on when Commission meets next

- **Applicant Receives Commission Decision**
  - ~10 mos. after application submitted
Registration – First Step

• Email invitation with link to register sent about six months prior to application due date
• Email sent to current accreditation primary contact – we update this list a couple weeks before the email goes out
• Registration is due about one month prior to pre-application due date
• Registering unlocks the pre-application and application sections
Pre-Application – Second Step


• Due about 12 weeks prior to application due date

• Consists of:
  – Accreditation Agreement and Pre-app questionnaire
  – Land Conservation Project List [LCPL]
  – Most recent Form 990 and Final tax determination letter
  – Schedule of Dedicated and Restricted Funds
  – Legal Defense Reserves Calculator
  – Disclosures of conflicts, amendments/extinguishments, management/enforcement issues
  – Related entities
Verification Items – Third Step


• Posted about eight weeks prior to application due date

• Consists of:
  – Selected projects (easements and/or fee)
    • Complete project documentation, or
    • Discrete documentation (such as title from a recent project)
  – Selected conflicts
  – Selected amendments/extinguishments
  – Selected management/enforcement issues
Application – Fourth Step


• Consists of:
  – Application questionnaire and associated attachments
    • General
    • Finance
    • Governance
    • Transactions
    • Stewardship
  – Verification items
Application Review – Fifth Step

• Review team (staff and commissioners) evaluates compliance with indicator elements by considering:
  – Pre-application/Application
  – Supporting documents
  – Project documentation
  – Public notice/comments
  – Research
Additional Information Request – Sixth Step

• Follow-up letter with document requests or corrective action
Decision by Full Commission – Seventh Step

- **Renewal**
  - Awarded for 5-year term*
  - Expectations for Improvement
- **Conditional Renewal**
  - Renewed as above, with formal check-in
- **Not Renew**

* Seven years starting at third renewal
• 98%
• 99%
• 20%
Commission’s Review Approach

• Consistency
• Fair but flexible
• All must demonstrate compliance
• No one-size-fits all
• Recognize diversity
Process Opportunities

At each step in the process organizations can provide explanations or additional documentation to show it meets the requirements.
Process Opportunities

• Pre-application (If requested)
• Application (As desired or if requested: to replace previously-provided files)
• Additional Information Request [AIR] (documents and corrective action)
• (Rare) After AIR but before Commission decision (documents)
• Conditional AIR (documents and/or corrective action)
Questions on the Renewal Process?
Start your plan
How Do I Start Preparing for Renewal?

• Build an accreditation team
• Ensure that accreditation contact is up-to-date with Commission
• Conduct an organizational assessment and identify big hurdles
• Review (re-review) any EFIs issued at time of accreditation
• Test your organization
Gathering Information from Five Years

• Land Conservation Project List Data
  o All properties and easements
  o Easement/fee title Inspection dates
  o Baseline/management plan dates
• Conservation easement violations
• Fee ownership challenges
• Conservation easement amendments
• Conservation easement extinguishments
• Conflicts of interest (financial and land/easement)
• Forms 8283 and landowners’ appraisals
## Land Conservation Project List

### Conservation Easements Project List

**COMPLETE THIS WORKSHEET ONLY IF APPLYING FOR RENEWAL OF ACCREDITATION**

*otherwise please select the "First-Time Accreditation CEList" tab for your conservation easements listing (see separate tab for complete instructions, including a description of the contents of each column)*

<table>
<thead>
<tr>
<th>Date Acquired</th>
<th>Project Name</th>
<th>Town, City, or County</th>
<th>Acres</th>
<th>Type (D/B/P/M/O/O)</th>
<th>Baseline Report Date Completed</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Monitoring Dates (mm/yy)**

**Complete if Form 8283**

Enter yes if, since 2016, transaction was a) with a pass-through entity of unrelated parties with an appraised value more than 2.5 times the basis in the property within 36 months of the entity’s acquisition and b) the value of the donation was greater than $1 million. If yes to column “J,” enter appraised FMV.

Notes (also, if “D” or “C” selected in Column F, please describe).
Complete if Form 8283

Enter yes if, since 2016, transaction was a) with a pass-through entity of unrelated parties with an appraised value more than 2.5 times the basis in the property within 36 months of the entity’s acquisition and b) the value of the donation was greater than $1 million.

If yes to column "J," enter appraised FMV.

Notes (also, if "O" or "C" selected in Column F, please describe).
Tools and resources
Accreditation Tools

- Commission’s website
  - Applicant Handbook
  - Online Application
- YouTube tutorials
- Requirements Manual (session E01)
Commission’s Website
www.landtrustaccreditation.org

Explore the assessment and accreditation requirements. Learn more about when and how to register. Go →

Pre-Application and Attachments
Application and Project Documentation
Review Process and Commission Decision

Useful Documents
Timeline and Costs
Already Registered?
Applicant Handbook

Table of Contents

Background Information .................................................................................................................................................. 3

Requirements Manual .................................................................................................................................................. 7

Welcome! ................................................................................................................................................................. 10

Report any Contact or Structural/Operational Changes Prior to Renewal ......................................................... 10

Purpose of Renewal .................................................................................................................................................. 11

Getting Ready and Registration .............................................................................................................................. 12

Starting the Conversation .......................................................................................................................................... 12

Registering for Renewal ............................................................................................................................................ 12

Pre-Application and Attachments ............................................................................................................................ 14

Pre-Application Attachments .................................................................................................................................. 14

Land Conservation Project List ............................................................................................................................... 15

Schedule of Dedicated and Restricted Funds ........................................................................................................ 16

Public Notice ............................................................................................................................................................ 17

Project Documentation and Sample Documentation Request .................................................................................. 18

LAND TRUST ACCREDITATION COMMISSION
Online Application (Preview)

http://ltac.civicore.com
YouTube Tutorials
www.youtube.com/user/AccreditationCommiss/videos
Online Courses

Introduction to Accreditation and the Requirements Manual

CLICK HERE FOR VIEWING INSTRUCTIONS

Introduction to Accreditation and the Requirements Manual

GET STARTED

Land Trust Alliance
Together, conserving the places you love
Other Tools

Alliance
- The Learning Center
- Standards and Practices background narratives
- Training, conferences, online learning and webinars
- Staff

Commission
- Enews
- Factsheets/Policies
- Template Policies and Accreditation Tips
- Staff
E01: Renewing Accreditation 201: Pointers for Preparing your Renewal Application

SATURDAY 1:30 PM – 3:30 PM
• Jennifer Brady-Connor
  jbconnor@landtrustaccreditation.org
• Valerie Roof (Senior Review Specialist)
  vroof@landtrustaccreditation.org
  518-587-3143
• Jessica Whittaker (Senior Review Specialist)
  jwhittaker@landtrustaccreditation.org
  508-763-2053
Final Questions and Thank you!
Renewal Applicant Handbook

A Land Trust’s Guide to the Renewal Accreditation Process

Conservation Excellence

For land trusts applying in 2019 round 3 onward

If you have questions, email info@landtrustaccreditation.org or call 518-587-3143.
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background Information</td>
<td>3</td>
</tr>
<tr>
<td>Requirements Manual</td>
<td>7</td>
</tr>
<tr>
<td>Welcome!</td>
<td>10</td>
</tr>
<tr>
<td>Report any Contact or Structural/Operational Changes Prior to Renewal</td>
<td>10</td>
</tr>
<tr>
<td>Purpose of Renewal</td>
<td>11</td>
</tr>
<tr>
<td>Getting Ready and Registration</td>
<td>12</td>
</tr>
<tr>
<td>Starting the Conversation</td>
<td>12</td>
</tr>
<tr>
<td>Registering for Renewal</td>
<td>12</td>
</tr>
<tr>
<td>Pre-Application and Attachments</td>
<td>14</td>
</tr>
<tr>
<td>Pre-Application Attachments</td>
<td>14</td>
</tr>
<tr>
<td>Land Conservation Project List</td>
<td>15</td>
</tr>
<tr>
<td>Schedule of Dedicated and Restricted Funds</td>
<td>16</td>
</tr>
<tr>
<td>Public Notice</td>
<td>17</td>
</tr>
<tr>
<td>Project Documentation and Sample Documentation Request</td>
<td>19</td>
</tr>
<tr>
<td>Application Questionnaire and Documentation</td>
<td>20</td>
</tr>
<tr>
<td>Application Questionnaire</td>
<td>20</td>
</tr>
<tr>
<td>Application Documentation</td>
<td>21</td>
</tr>
<tr>
<td>Project Selection and Documentation</td>
<td>24</td>
</tr>
<tr>
<td>Review Process and Commission Decision</td>
<td>25</td>
</tr>
<tr>
<td>Where to Go for Help</td>
<td>29</td>
</tr>
<tr>
<td>Maintaining Accreditation</td>
<td>31</td>
</tr>
</tbody>
</table>
Background Information

Why Accreditation Matters

Land trusts across the country permanently protect more than 40 million acres of farms, forests, parks and natural areas that are vital to healthy, vibrant communities. Accreditation advances excellence among land trusts, and provides the public, landowners, and donors with the confidence that these important conserved lands will be protected forever.

Voluntary accreditation provides independent verification that land trusts meet the high standards for land conservation, stewardship and nonprofit management in the nationally recognized Land Trust Standards and Practices. Accredited land trusts now conserve almost 80% of all land under conservation easement or owned in fee by land trusts, ensuring the promise of perpetuity.

How Accreditation Works

Land trusts seeking to achieve or renew accreditation submit detailed documentation to the Commission. Professional accreditation staff and volunteer commissioners from the land trust community review each renewal application to confirm that accredited land trusts adhered to Land Trust Standards and Practices and accreditation requirements over their accredited term.

Accreditation is not a one-time action; it fosters continuous improvement as land trusts maintain their accredited status by applying for renewal every five years. By renewing accreditation, each accredited land trust affirms its commitment to a network of organizations united by strong ethical practices. This trusted network of land trusts has demonstrated fiscal accountability, strong organizational leadership, sound transactions and lasting stewardship of the lands they conserve.

Accreditation Principles

The following principles guide the accreditation program.

- Accreditation is voluntary.
- All information provided by applicants is managed in accordance with the Commission’s confidentiality policy.
- Accreditation is not a one-time action; it is a tool to foster continuous improvement.
- Accredited organizations are united by strong ethical practices and a commitment to the long-term stewardship of land and conservation easements in the public interest.
The Accreditation Seal

The accreditation seal is a mark of distinction in land conservation. It is awarded to land trusts meeting the highest national standards for excellence and conservation permanence. Each accredited land trust completes a rigorous review process and joins a network of organizations united by strong ethical practices. This trusted network of land trusts has demonstrated fiscal accountability, strong organizational leadership, sound transactions and lasting stewardship of the lands they conserve.

The Land Trust Accreditation Commission awards the seal. The volunteers who serve on the Commission represent a diverse group of land conservation and nonprofit management experts from around the country. Because the seal is a registered trademark of the Land Trust Accreditation Commission, the Commission licenses the use of the seal to land trusts only after a rigorous process to verify the organizations meets national standards. The seal identifies land trusts that are accredited and meet national standards for excellence, uphold the public trust and ensure that conservation efforts are permanent.

About the Commission

The Land Trust Accreditation Commission was incorporated in April 2006 as an independent program of the Land Trust Alliance (Alliance) to operate an innovative program to build and recognize strong land trusts, foster public confidence in land conservation and help ensure the long-term protection of land. Read more about the history of the Commission >>

The Commission’s mission is to inspire excellence, promote public trust and ensure permanence in the conservation of open lands by recognizing land trust organizations that meet rigorous quality standards and that strive for continuous improvement.

Core Values

In its actions and in its goals for the land trust community, the Commission aspires to the following values.

- **Integrity.** To be clear and honest in our communications with land trusts, the public and others; to build trust in, and respect for, the accreditation program; to respect the confidentiality of data provided to us.
- **Accountability.** To operate an accreditation program that is fair and makes consistent decisions; to learn from and respond to the land conservation community, the public and other stakeholders.
• **Service.** To manage an accreditation program that is efficient and makes productive use of participants’ time; to work cooperatively with land trusts of all types and sizes as they go through the accreditation process.

**Role of the Commission**

The Commission is an independent nonprofit that serves as a supporting organization of the Alliance. The Commission is governed by a board of diverse land conservation and nonprofit management experts from around the country who serve as commissioners.

Commissioners volunteer their expertise to verify that a land trust is implementing specific accreditation indicators from *Land Trust Standards and Practices*. The Alliance selects the accreditation indicators and the Commission establishes the requirements used to verify the indicators are met. Commissioners use their breadth of experience with large and small and staffed and unstaffed land trusts to ensure the requirements are flexibility enough to apply to all land trusts.

The Commission follows best practices in accreditation.

- It has a comprehensive conflict of interest policy and manages conflicts to ensure fair and consistent decisions.
- It makes independent decisions that are not influenced by political or donor concerns.
- It maintains a help desk and instructional materials to coach land trusts through the accreditation process and how to document compliance, but does not provide training or mentoring in how to meet the requirements.
- It keeps all applicant material confidential, sharing only aggregate data about challenges facing land trusts to help inform the Alliance’s training and technical assistance program. A strict confidentiality policy governs how information is shared between the two organizations.

**Role of the Alliance**

The Alliance is a national conservation organization working to save the places people love by strengthening land conservation across America. The Alliance publishes *Land Trust Standards and Practices* and selects the accreditation indicators; only its board can make changes to them.

The Alliance provides training and technical assistance to help land trusts achieve and maintain accreditation. It elects commissioners to serve on the Commission’s independent board, manages an endowment to keep the program affordable for land trusts, and provides administrative services to the Commission.
Role of the Public

Special places exist in every neighborhood, city and town – the family farm, the urban park, the mountain view. Accredited land trusts are making sure that the places we love today will be loved by generations to come. Public accountability is a key component of the accreditation program; the public is invited to provide information in accordance with the Commission’s “Feedback, Comments and Complaints” policy.

The Commission accepts comments from the public at any time; comments on accredited land trusts (particularly current renewal applicants) may be submitted online, via email, or in writing (mail to Land Trust Accreditation Commission, 36 Phila Street, Suite 2, Saratoga Springs, NY 12866). While comments received by the Commission must be attributed, the name of the commentator is not disclosed to the applicant.

Benefits of Accreditation

The accreditation seal is a mark of distinction, and being accredited helps your land trust to stand out, to say to landowners, funders and other supporters: “Invest in us. We have proven we are a strong, effective organization you can trust to conserve your land forever.”

What Accreditation Means to Land Trusts

100% of surveyed respondents report that accreditation strengthened their organization, and their organizational and transaction records.

What Accreditation Means To Land Trusts, Donors, Government, and the Public

In recent surveys of accredited and renewed land trusts, 100% report accreditation helps the land trust community maintain the trust of Congress, the Internal Revenue Service, and the public. This is proving true: as recently as 2017, the US Fish and Wildlife Service released new internal guidance on mitigation that includes consideration of accredited land trusts. Read more

Once your land trust achieves accreditation you can proudly display the accreditation seal on your accredited land trust’s publications and website. Being accredited also provides your land trust with a number of tangible benefits; see our Benefits of Accreditation fact sheet for examples.

- Conservation Defense Insurance: Accredited land trusts are automatically eligible for an annual premium discount of $11 per insured unit when they enroll in the conservation defense insurance program offered by Terrafirma Risk Retention Group LLC.
- Colorado landowners desiring a state tax credit for a conservation easement donation must work with a holder certified by the state. There is an expedited certification process for accredited land trusts.
• Louisiana land trusts must be certified to hold and conserve certain mineral interests; documentation of land trust accreditation expedites the certification requirement.
• Texas requires land trusts to be accredited to receive matching funds for projects near or adjacent to Texas state parks.
• Doris Duke Charitable Foundation provides funds through Open Space Institute for its resilient landscapes initiative. Extra points are awarded to accredited land trusts or land trusts that are committed to becoming accredited.
• Chester County, PA includes land trust accreditation in its eligibility criteria for funding for its Brandywine Headwaters Preservation Program.
• The Gaylord and Dorothy Donnelley Foundation provides land trusts that have already received support from the foundation with unsolicited grants of $10,000 each when they earn accreditation.
• The 1772 Foundation considers a number of factors when evaluating grant applicants, including whether a land trust has prioritized accreditation.
• When seeking to become LEED-certified, a project proponent may opt to provide financial support to an accredited land trust to obtain credit for the “protecting or restoring habitat” certification element.

Before You Begin
In addition to reviewing the instructions in this handbook, accredited land trusts planning and preparing for renewal must download and read each of the following documents prior to beginning, and have a copy of each readily available throughout the renewal application process:

• A reference copy of the registration, pre-application and application questions and documentation requests. Note: these are provided for your reference only (all responses and supporting documentation are provided via the online application).
• The Requirements Manual (revised periodically), which provides, all in one manual, information on the elements the Commission evaluates for every accreditation indicator and how to document that your land trust is meeting the requirements.
• If applying with related entities, also review the reference copies of the Addendum for Multiple Corporations – Basic and the Addendum for Multiple Corporations – Intermediate (as applicable). Each applicable entity must submit the required information as part of the primary applicant’s application in accordance with the Commission’s policy.
• Learn more about requirements for land trusts that accepted land or easements from other organizations, or that engaged in mergers or affiliations.

Requirements Manual
The Requirements Manual helps land trusts achieve success in the accreditation process. It serves as a guide for land trusts, providing information on each of the requirements evaluated as part of the accreditation process. The 2018 Requirements Manual was released on
March 7th, 2018. Land trusts that are applying for or renewing accreditation in 2018 onward will be evaluated against the 2018 Requirements Manual for their application.

**Background on Updating the 2018 Requirements Manual**

- In August 2017, the Commission released a 2018 draft Requirements Manual and held a public comment period on new accreditation requirements.
- The final 2018 Requirements Manual was released on March 7th, 2018.
- The Commission will use the 2018 Requirements Manual to evaluate applicants beginning in 2018. Find out what this means for your land trust. Learn more about the updates to the accreditation requirements and application materials.
- Questions? Watch and listen to the 2018 Requirements Manual Release Webinar to help you understand the updates to the Manual and accreditation requirements.

The requirements are based on indicator elements from *Land Trust Standards and Practices* and the evolving field of land conservation as well as our experience reviewing over 400 applications for land trust accreditation and renewal. The requirements are reviewed annually, and we work closely with the Alliance and the land trust community on each edition. Click here for more information on how the requirements are established.

The requirements let land trusts know what an application must show. While each applicant must comply with each requirement, how the land trust demonstrates compliance varies greatly! Click here for more information about how the requirements are designed to allow for this flexibility. Click here for information about past editions

**Frequently Asked Questions**

*What are the requirements and how do they relate to Land Trust Standards and Practices?*

The accreditation program verifies if a land trust is meeting Land Trust Standards and Practices by sampling documentation related to a number of “indicator elements.” Indicator elements are broken down further into requirements; requirements are things that can be verified and must be met by each applicant at either first-time accreditation, first renewal, and/or each subsequent renewal. Download infographic

The Requirements Manual is a compendium of all requirements, and lets land trusts know how they are going to be evaluated for compliance at each point in the application process, helping ensure applicants have the guidance needed to be successful in the accreditation process. Download and review the Requirements Manual.

*How are the requirements created?*

We follow best practices in accreditation by establishing the specific requirements used to make fair and consistent decisions. While our bylaws give us this responsibility, in practice we work closely with the Alliance when setting requirements. These five criteria guide the development of each requirement.
• Consistent with the language of the specific indicator element in *Land Trust Standards and Practices*.
• Consistent with Alliance materials, published law, other published sources, and/or other professional advice (e.g., accountants, appraisers, etc.).
• Essential to land trusts and the land trust community (high risk).
• Equitable, fair, and feasible for all land trusts.
• Verifiable at a reasonable cost.

*How often is the Requirements Manual revised and how will I know?*
Requirements are reviewed annually to ensure they reflect current practice in the land trust community and they remain practical for verifying compliance with accreditation requirements. The process starts with a committee looking at comments from the land trust community as well as issues identified in applications throughout the year. This is followed by a public comment period. We announce any public comment periods followed by the availability of the newest edition, via emails, webinars and other outreach, highlighting changes and giving advance notice for changes that take effect in the future. Our website has the current version, redline versions of past editions, and a summary of changes over time. You can provide your comments about the manual and give any other feedback about the program using the comment button on our website.

The Commission released the 2018 *Requirements Manual* after a public comment period held in 2017.

*How do the requirements account for flexibility?*
Each accredited land trust must show how it meets the accreditation requirements; however, “one size does not fit all” in land conservation. The requirements let land trusts know what the application documentation must show. The Learning Center has many examples of how land trusts of all sizes and scope implement the practices. In addition, some of the requirements have “such as” lists showing the variety of ways the requirement can be met.

Your land trust may have an isolated or rare situation that prevents it from having the required documentation. In those instances:

• **You Can Help:** We strongly encourage land trusts to provide additional documentation with their application to fully explain an isolated or rare event and relevant facts and circumstances. This additional information in the application will saves applicant time by avoiding unnecessary questions later in the application review process.
• **Context Matters:** We review the additional information you submit and evaluate the risks posed, severity or frequency of the issue, the ability to address the issue in timely manner, etc. These facts are considered by commissioners who use their experience in land conservation to evaluate the issue. Depending on the requirement and the facts and circumstances, the Commission may request additional information, require corrective action, issue an expectation for improvement or take other actions. This ensures that every accredited land trust meets the requirements while accounting for flexibility and diversity.
Providing Feedback

The Commission welcomes feedback on the Requirements Manual at any time from the land trust community and other stakeholders. Comments for next year’s edition are most useful by October to ensure that they are considered as part of the annual review process. We recently sought feedback on the draft 2018 Requirements Manual during a public comment period open from August 23 - September 30, 2017.

The Renewal Process

Welcome!

Welcome to renewal of accreditation! Here is an overview of the renewal process.

Renewal Process Overview

Total time to decision: about 10 months after application is submitted

Report any Contact or Structural/Operational Changes Prior to Renewal

Please notify the Commission of any major changes in your land trust’s structure or operation. Why? Because some changes could affect your land trust’s ability to be successful at renewal, or prevent you from receiving important information about your renewal. Complete
this form to let us know about changes to your organization name, structure, accreditation contact, etc. and we’ll be in touch.

Somewhat common changes that require written notification include the following.

- Change of scope in activities (such as accepting a conservation easement whereas you only held fee properties when first accredited).
- Transformation of governance structure (such as mergers, changes in a parent organization, etc.).
- Significant changes in mission (such as taking on activities that are counter to land conservation or eliminating the organization’s land conservation program).
- Settlement of legal actions taken against the land trust.
- Change of tax-exempt or charitable status.
- Other changes that may result in the land trust’s no longer implementing Standards and Practices and program requirements.

Purpose of Renewal

Renewal of accreditation is important for several reasons and purposes including the following:

- To foster continued implementation of all of Land Trust Standards and Practices.
- To reflect evolving best practices in the field.
- To confirm compliance with current accreditation indicators and program requirements.
- To verify an accredited land trust’s action on expectations for improvement.
- To identify and evaluate major changes in accredited land trusts.

There are several principles that guided the development of the renewal program.

- Renewal is on a five-year cycle to best meet the purposes identified above. (Some accreditation programs are annual; some extend as long as ten years. The longer-cycle programs tend to involve complete re-accreditation.)
- Renewal is intended to focus on the accredited land trust’s activities during its five-year accredited term.
- The renewal process has fewer checkpoints and opportunities for corrective action than the process for first-time accreditation; the Commission expects that accredited land trusts have been following Land Trust Standards and Practices and program requirements throughout their accredited term.
- The renewal process involves an online application and review system.
Getting Ready and Registration

You've achieved accreditation, committed to following Land Trust Standards and Practices, and now you are ready to demonstrate your continued commitment to excellence, trust and permanence.

As soon as your land trust is accredited it can begin to take steps to help prepare for renewal. For instance:

- **Immediately**: Sign up for and read our eNewsletter, which contains important news and tips.
- **Immediately**: Most land trusts that achieve accreditation for the first time are also issued “Expectations for Improvement” (EFIs); some land trusts are issued EFIs as part of a compliance confirmation process. It is never too soon to think about how your land trust will address EFIs! Review any EFIs your land trust received; address right away any EFIs for creating templates, updating templates, etc. and create a strategy for identifying opportunities to address any other EFIs that are more situational. Document when progress is made to address them. See the end of this Handbook for more information about EFIs.
- **As Needed**: Keep track of instances during your accredited term when Standards and Practices were not followed, and the circumstances, so you can readily document this at renewal.
- **Annually**: Read the Requirements Manual at least annually to become aware of and better understand changes to the accreditation indicators and program requirements that were published after your land trust was accredited.
- **Two Years Prior to Renewal**: Download a more comprehensive “Workplan for Renewal”.

Starting the Conversation

The Commission is pleased to provide the following presentation materials for use by land trust staff and boards considering renewal of accreditation:

- Benefits of Accreditation Fact Sheet
- PowerPoint presentation
- Script for PowerPoint presentation
- Handouts: overview for your board
- Infographic about the impact of renewal and ensuring permanence

Registering for Renewal

Registration serves many purposes:

- Confirms your land trust’s intent to renew.
- Ensures the Commission has your land trust’s current contact information.
- Identifies any related corporations that will be part of your pre-application and application.
Registration for a renewal round generally opens six months prior to the application due date. At that time the Commission will send your accreditation contact an email to start the registration process.

**Required Registration, Pre-Application and Application Dates**

Your accredited land trust must register for renewal, submit a renewal pre-application, and submit a complete renewal application prior to its accreditation expiration date. **As long as those three key deadlines are met, your land trust will remain accredited until the Commission makes a final decision on your renewal application.**

There will generally be two rounds each year for renewal applications. Your land trust will be contacted about two years prior with general information about the year and round it must renew, and again within six months of your application due date with more specific details. Plan accordingly and make sure your land trust registers and meets all associated deadlines.

- Registering one round earlier than scheduled.
- Information on penalties related to failure to register and meet subsequent deadlines.
- Deadlines and Exceptions for Catastrophes.

**The Registration Process**

- **It’s online!** The entire renewal process (including registration) is completed entirely online via [http://ltac.civicore.com](http://ltac.civicore.com).
- **It’s easy!** A reference copy of the renewal registration form is available online. At registration, your land trust also pays the renewal registration fee.
- **We will send a reminder!** Six months prior to your land trust’s application due date, the primary accreditation contact for your organization will receive an email to alert him or her to begin the renewal process and with a link required for registering.

**Frequently Asked Questions**

*How will our land trust know when it will apply for renewal?*

Here is a general rule for how renewal rounds are assigned (contact us for the specific year and round assigned to your land trust).

- If your accreditation expiration date is August – your application is due in the Spring Round of the same year.
- If your accreditation expiration date is January – your application is due in the Fall Round of the previous year.

*How do we confirm who the Commission has on file for our accreditation contact?*

To confirm or change your accreditation contact send us an email with the updated information or call 518-587-3143.
Do we have to show that we completed an assessment during our accredited term?

Renewal applicants do not have to demonstrate that they completed an assessment against all *Land Trust Standards and Practices*. However, conducting an assessment remains a great way to prepare for renewal:

- Assessments conducted before applying for renewal may help land trusts identify areas that need more work before submitting the renewal application.
- Completing periodic assessments against the full set of practices helps land trusts set benchmarks for continuous improvement.
- A new assessment helps measure progress against your past benchmarks.

Pre-Application and Attachments

NOTE: Be sure you are using the most current renewal pre-application and application for a reference; a reference copy is available online.

The renewal pre-application is part of the online application system. Each applicant for renewal is required to complete a pre-application questionnaire and submit the required pre-application attachments electronically. Applicants for accreditation submit a pre-application approximately 12 weeks before their complete application is due.

Details on how to submit a pre-application using the online system are located in the online application system. Click here for information about penalties for failure to meet required due dates.

Pre-Application Questionnaire

The Pre-Application Questionnaire asks basic questions about your land trust’s land conservation activities, related entities (if any), and potential conflicts of interest with current staff and commissioners.

Tip: If applying with related entities, information on each applicable entity is requested as part of the primary applicant’s pre-application in accordance with the Commission’s policy.

Tip: Learn more about requirements for land trusts that accepted land or easements from other organizations, or that engaged in mergers or affiliations.

Pre-Application Attachments

The pre-application requires a number of attachments including the following.

- **Your land trust’s most recent Form 990** (or Form 990-EZ, or Form 990-N).
  - The Form 990 is used to determine the accreditation application fee, and is also evaluated as part of the application review process.
- Please include all completed Schedules, Statements and Attachments that accompanied your organization’s Form 990 (or Form 990-EZ) filed with the Internal Revenue Service (not the public inspection version).

- **Accreditation Agreement.** Your land trust must download, sign and submit a scanned copy of the signed Accreditation Agreement as part of your pre-application.
  - The Accreditation Agreement obligates the organization to abide by the terms and conditions of the accreditation program. It also obligates the Commission to abide by its policies.
  - It should be signed by an individual with the authority to enter into contracts on behalf of the organization.

- **Land Conservation Project List (LCPL).** The LCPL must be submitted electronically as part of your pre-application. Read more about the LCPL below.

- **Schedule of Dedicated and Restricted Funds (SDRF).** The SDRF must be submitted electronically as part of your pre-application. Read more about the SDRF below.

## Land Conservation Project List

A completed Land Conservation Project List (LCPL; Excel file) must be included for all conservation easements and conservation fee properties held by your organization, and must be submitted with all pre-applications.

Download the LCPL Template and Instructions  
Watch the LCPL Video Tutorial

### Overview and Tips

The LCPL provides the information we need to:

- Select projects that accompany your application as part of project documentation
- Confirm that the land trust meets the requirements for easement monitoring, baseline documentation reports, fee property inspections, and/or fee property management plans (as described in the Requirements Manual).
- Determine whether your land trust meets the minimum stewardship and defense funding requirements for accreditation.

**TIP:** Applicants must list all conservation fee properties and conservation easements held at the time of pre-application.

**TIP:** Detailed instructions for completing the LCPL are located in the Excel template. One set of instructions accompany the conservation easement worksheets; a second set of instructions accompany the conservation fee properties worksheet.

**TIP:** The LCPL data provided must be no older than three months prior to the pre-application due date.
TIP: If your land trust maintains its own database, it may be more convenient for you to download the data from your database and use that as the foundation for your LCPL information. In that instance, you can bypass using the Commission’s LCPL template; however, you must ensure that your data is presented in an Excel spreadsheet and contains the same columns as indicated on the Commission’s LCPL template.

Frequently Asked Questions

What if we have easements other than conservation easements?

You do not need to list agreements that were not created according to the state’s conservation easement enabling law, such as trail agreements, restrictive covenants, etc.

Do we have to list conservation easements where we hold only a third-party right of enforcement?

No, you do not.

Do we have to list conservation easements where we are listed as a co-holder?

Yes. If your organization co-holds conservation easements with another entity, these must be listed. Please make a note in the “Notes” field indicating this is a co-held easement and any relevant details.

How do we complete the LCPL if we do not hold any conservation fee properties or conservation easements at time of pre-application?

If your organization does not currently hold any conservation fee properties or conservation easements, but meets the eligibility requirements for accreditation because it has been in the chain of title on at least two projects, you need to complete a modified LCPL, available upon request from the Commission. Please note that the number of projects selected will correspond to the volume of transactions completed and the length of time the properties were held.

Schedule of Dedicated and Restricted Funds

A completed Schedule of Dedicated and Restricted Funds (“SDRF”; Excel file) must be submitted with each renewal pre-application.

Download the SDRF Template and Instructions
Watch the SDRF Video Tutorial

The SDRF is used by the Commission to understand the financial reserves and dedicated or restricted funds your organization has available for the following purposes.

- Operating expenses
- Conservation easement stewardship
- Conservation easement defense
- Land management
Based on this information, the review team confirms that the land trust meets the funding requirements for easement stewardship and defense and/or for fee land management (as described in the Requirements Manual).

*TIP:* For renewal applications, the SDRF data must be no older than three months prior to the pre-application due date. *Compare the SDRF with your most recent external evaluation for consistency in reporting.*

*TIP:* You do NOT need to report on funds for specific projects for acquisition, special projects such as internships, etc. that are not related to stewardship, defense or land management.

**Frequently Asked Questions**

*What if our land trust unintentionally submits information on our SDRF that is out-of-date or wrong?*

We examine the application data closely as part of our review in part to identify issues that would jeopardize your ability to become accredited. If at time of application we cannot confirm that your land trust meets the funding requirements, we will let you know as part of the Additional Information Request to give you the opportunity to confirm that the data in your application is accurate, or to provide updated accurate information, or to submit a funding plan as described in the Requirements Manual.

*What if we have property-specific funds for our fee properties or easements?*

If your organization maintains property-specific funds, list them individually and provide a separate total of funds available for general stewardship of holdings without property-specific funds.

*Should we list pledges or anticipated gifts in kind?*

No, please include only cash or cash equivalents; do not include funds pledges or other promises to give.

**Public Notice**

As part of a complete application, applicants are required to provide evidence that they have notified key stakeholders that the organization is applying for accreditation or renewal. Most organizations complete their public notice around the time they submit their pre-application.

**Template Public Notice Form**

The notice to stakeholders must include information on how interested parties can comment, when comments are due and the requirement that comments must relate to Land Trust Standards and Practices. For your convenience we have provided a template public notice form that your organization can use to announce its application for accreditation and the
opportunity for the public to submit comments. You may edit the language, but the key components – how to comment, that comments must relate to national quality standards, and a target due date – must be included. Download template public notice form

**Documenting Public Notice**

Notice must be completed by the time the complete application is submitted. Include copies of the notice(s), along with a short summary of who was notified and when, in your application. The application is not complete without copies of the notice(s).

**Conducting Public Notice**

Land trusts interact with a wide array of groups and individuals, and there is no one-size-fits-all list of stakeholders. Each land trust must determine who its most important internal and external stakeholders are and the best way to reach them. Consider people knowledgeable about your organization or its work who might have comments relevant to accreditation. Some specific options your land trust might consider:

- Newsletter: If you run an article in your newsletter, send us a copy of the newsletter along with general information on the size and type of list it was sent to, not the actual list (for example, “sent to 750 dues-paying members and local town council members”).
- Targeted letter to knowledgeable colleagues: If you send a more targeted letter to a small group of stakeholders, we would like to see a copy of the letter and the list of names and/or affiliations of the people it was sent to.
- Press releases or letters to the editor: You may also consider sending a press release or letter to the editor to local or regional newspapers. You may send us a copy of the release and a list of newspapers it was sent to.
- Website: Many organizations have posted information on how to submit a public comment on their websites. You may simply indicate in a cover note to us that information was posted on your website and how you let people know it was posted.

Your land trust may choose to implement one or more of the outreach methods listed (or other methods not listed). We will review the notice materials to determine that the applicant made a reasonable effort to inform stakeholders about their application for accreditation.

**Frequently Asked Questions**

*Do we have to send a mailing, or pay for legal notices in the newspaper?*

No. Paid notices and/or advertisements/mailings are not required or encouraged.
Do you have any examples of public notice strategies from other applicants?

We secured permission to share the following public notice strategy from Triangle Land Conservancy (NC). It is simple, and follows the guidance above.

<table>
<thead>
<tr>
<th>Outreach Method</th>
<th>Stakeholders Reached</th>
<th>Documentation for Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadcast Email</td>
<td>TLC Email list (~4,500 community members)</td>
<td>Copy of email and specific # of emails sent</td>
</tr>
<tr>
<td>Targeted Email</td>
<td>Board and advisory committee members, staff, volunteers, conservation groups, land trust networks, partner community organizations, public agencies</td>
<td>Copy of email and mailing list</td>
</tr>
<tr>
<td>Press Release</td>
<td>Area residents, public agencies, elected officials</td>
<td>Copy of release and distribution list</td>
</tr>
<tr>
<td>Spring Newsletter article</td>
<td>Members, corporate supporters, property neighbors, partner organizations</td>
<td>Copy of newsletter and description of mailing list (size and type)</td>
</tr>
<tr>
<td>Webpage and social media</td>
<td>Members, community members, community organizations</td>
<td>Note about posting and associated outreach</td>
</tr>
</tbody>
</table>

What if the Commission receives a negative comment about our land trust?

While all public comments are shared with the review team, public comments are not the sole determining factor in an accreditation decision. A negative comment may lead to a request for additional information and follow-up depending on the substance and nature of the comment, particularly if a comment indicates that a land trust may not be complying with the Standards or accreditation requirements.

Project Documentation and Sample Documentation Request

The Commission reviews each renewal pre-application to a) select projects and select sample documents for inclusion in the main application, and b) calculate the accreditation application fee (due at time of application). Commission staff may also do a preliminary review of the LCPL data and contact your land trust to try to resolve gaps in LCPL data prior to the application due date. The Commission selects projects from those completed during your land trust’s accredited term.* You will receive the list of selected projects within eight weeks of the application due date, along with any additional verification requests.

The number of projects selected at renewal will generally be capped at four (two easements and two fee properties); additional projects may be selected if the land trust had a large volume of acquisitions during its accredited term. The Commission may select more than four projects for a variety of reasons, such as when organizations have completed a large number of projects over their accredited term, have a variety of unique projects or have multiple interlocking corporations holding land. The review team may also request documentation for more projects if it believes this information is needed to make an accreditation decision.

*If your organization did not complete any transactions during its accredited term, the Commission will only confirm stewardship of older projects through selection of monitoring reports, baseline documentation reports, and/or land management plans. Should your organization be awarded accreditation for a subsequent term, you will be required to notify the Commission when you complete a transaction. The Commission may review project documentation from the transaction under its compliance confirmation process.
Application Questionnaire and Documentation

NOTE: Be sure you are using the most current renewal pre-application and application for a reference; a reference copy is available online.

You are welcome to begin working on your online application as soon as you have registered for renewal. However, we require that the responses in your application be no older than 90 days prior to submission so plan to review your responses and attachments accordingly.

A land trust remains accredited during the renewal application review process as long as it meets all assigned deadlines for renewal, even if its accreditation expiration date has passed. Click here for information about penalties for failure to meet required due dates.

All material submitted to the Commission at renewal must be submitted electronically using the online application system. Make sure to plan ahead to ensure that your land trust has all the information needed to ensure the application can be submitted electronically by the application due date.

TIP: Previous applicants found it helpful to review the application questionnaire and list of attachments in advance of logging onto the system. Click here for a reference copy of the renewal application questionnaire and required documents.

TIP: The application fee is also due on the application due date. It is invoiced separately. See the current accreditation fee schedule for details. Read more >>

Application Questionnaire

Your responses to the application questionnaire determine the list of supporting documentation that will be required from your organization. Accreditation involves a mix of required documents and sampled documents to confirm that the land trust is following Land Trust Standards and Practices and meets the accreditation requirements. Some documents are required from all renewal applicants (such as policies); some documents are required depending on a land trust’s application responses (see example, below); and some documents are sampled as requested by the Commission (such as a baseline documentation report and easement monitoring reports from an older project).

Tips for Responding to Application Questions

When an applicant submits its renewal application, it attests that “the material provided in this application is an accurate reflection of our organization’s policies and operations.” When reviewing an application, the Commission review team compares the application responses to the supporting documentation. There are two types of application questions to pay particular attention to when you are filling out the application.
• Questions that require the land trust to confirm that current documents of a certain type (baseline documentation reports, management plans, monitoring reports, etc.) do or do not contain specific required elements.
  o If your land trust can confidently respond “yes” or “always”: great!
  o If you cannot, you have two options:
    ▪ Update the document(s) in question to add the missing elements and then respond “yes” to the question.
    ▪ Respond “no” or “not always” to the question and upload a supporting statement explaining what required elements are missing and why, and any actions you are taking to address the missing elements. This will greatly help the review team and save you time later – see the examples below.

• Questions that require the land trust to disclose instances since it last applied for accreditation of whether or not it followed Land Trust Standards and Practices and/or accreditation requirements. Again, please see the examples below.

Application Documentation
The application requires written statements as attachments, generally for detailed narrative responses. You may have written materials (such as policies, procedures, checklists, etc.) that answer the question; these may be included in support of your statement. If the written materials fully describe your response, you can provide those in lieu of a separate statement.

How Detailed an Answer?
Your statements and answers to the questions in the application should be clear and candid. You should do what you can to help a reader who does not know about your organization understand the work you are doing. Do not be concerned about getting the “right” answer. The Commission recognizes that there is a diversity of approaches in how each land trust implements the accreditation indicators. The key is that they are being implemented and you can show us how it is done in your land trust.

Changed Practices
A land trust may have substantially changed its practices in the last few years. If this is the case, you may want to note when substantial changes were made so that reviewers can understand differences between application answers and project documentation. It helps to be candid; if you have past projects that would not be done the same way today, explain what would be different.

New Policies
If your organization recently adopted new policies, your application must include evidence that the policies are being implemented. You may either provide documentation that your practices were in place before being formalized in a policy or show documentation of how the new policy is implemented.
**Disclosure: An Easy Path or Rocky Path**

As part of a renewal application we sample projects and other documentation to verify compliance with a number of accreditation requirements. The renewal process works best when a renewal applicant accurately responds to each question and, as needed, provides any explanation and documentation related to unique circumstances or lapses. On the flip side, the renewal process is substantially more tedious and time-intensive when a renewal applicant inaccurately (knowingly or not) responds to a question, at which point the review team has to follow up to understand what and how deep the issues are.

Let’s explore what can happen when a question is accurately answered and when the same question is answered inaccurately by another applicant. We will use the following question as an example: “Since its last application for accreditation, has your organization always investigated title prior to each acquisition of a conservation easement or fee property?”

<table>
<thead>
<tr>
<th>Disclosure: An Easy Path</th>
<th>Non-Disclosure: A Rocky Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>A land trust did not investigate title for one project during its accredited term. The land trust responded “not always” to the question in the application about title, then it provided an explanation in the associated required statement: that it had one project completed without title investigation, why the title was not complete, that the land trust had since completed an investigation of title retroactively, and that it now has internal procedures that ensure title is investigated before closing for every project. By chance, that project had also been selected for review. The review team could see that the title investigation was completed retroactively and prior to knowing that this project was selected. Since this had been disclosed in the application, there were no further questions on this particular project’s title. The other projects sampled all had contemporaneous title investigations that met the requirements. The land trust did not have to provide any additional documentation.</td>
<td>A land trust did not investigate title for more than one project during its accredited term. It responded “always” to the question to the question in the application about title and did not include any additional information. By chance, two of those projects were selected for review, and the review team noticed that the title investigations had not been completed and that there were no explanations or rationale. Because the land trust did not disclose or address the lack of title investigations, the review team had to issue the following complex documentation request to the land trust.</td>
</tr>
<tr>
<td>- Please provide documentation of title investigation for [PROJECT NAMES].</td>
<td></td>
</tr>
<tr>
<td>- Alternatively, if the organization did not obtain a title investigation for either of these projects at the time of acquisition, please complete the following:</td>
<td></td>
</tr>
<tr>
<td>- Review all transactions completed since accreditation was last awarded to determine how many fee properties and/or</td>
<td></td>
</tr>
</tbody>
</table>
conservation easements were acquired without completing a title investigation at or before acquisition.

ii. For all of the projects missing title investigations, complete a retroactive title investigation identifying the legal owner and mortgages, mineral leases or other elements specified in the practice 9H as shown above.

iii. Provide the retroactive title investigations for [NAME OF PROJECTS].

iv. Provide a list of the other projects that were missing documentation of title investigation, along with the date that title was completed.

v. As part of the retroactive title investigation, if title issues are identified that might impair the ability of the organization to enforce a conservation easement or to protect the conservation values of a conservation easement or fee property, then also provide documentation that the organization examined the risk the title issues pose to the conservation values on the specific properties and that it determined whether any corrective action could or should be taken.

vi. Provide a policy or procedure that documents how the organization will ensure compliance with the requirement in the future.

Your land trust can avoid this lengthy and complex additional information request by completing each question accurately and with full disclosure.
Project Selection and Documentation

Every applicant must provide project documentation as part of the application; the Commission selects these based on information provided in the pre-application.

Project Documentation and Targeted Verification Checklists

In addition to the main application documentation, the accreditation application includes documents from specific projects selected by the Commission based on information you provide in the pre-application. The documents show how your land trust meets the requirements in the context of your actual work. There are two types of documentation: project documentation and targeted verification documentation.

Project Documentation

With full project documentation, the Commission selects specific conservation easements or fee properties listed on the Land Conservation Project List provided in your pre-application. Your land trust then provides a full suite of documentation for that project.

The Commission has created a project documentation list that contains the potentially-required documentation for any type of conservation project (easement, fee, purchase, donation, mitigation, etc.). This list can be found online (see “Targeted Verification Item Checklists”). To compile your project documentation, review the list and identify the documents on the checklist that you have for the project selected by the Commission. Once you have identified the list of documents that are available for the project, compile the documentation and upload them to the online application system as prompted.

Targeted Verification Documentation

Targeted verification includes a narrow set of documents to show how the land trust met the requirements in a specific area. Based on your land trust’s pre-application answers and documentation, the Commission may request specific documents be uploaded for transactions or activities identified as being higher risk (i.e., a routine conservation easement amendment to add acreage would not be selected for additional documentation, but an amendment to add a building envelope likely would). The list of documents that could be requested for each type of targeted verification item can be found online.

Frequently Asked Questions

Can we redact confidential landowner information from our project documentation?

While documentation must include the donor or landowner’s name, as applicable, we require you to redact social security or tax identification numbers.

Can we select an additional project?

We choose projects that we believe illustrate a range of your conservation properties. However, you may choose one additional project and provide the requested documentation.
for it. Please note that this would be in addition to the documentation for projects we have chosen and not in lieu of it.

**Review Process and Commission Decision**

A review team of one or more commissioners and a Commission staff member reviews each complete renewal application in detail. The majority of the information evaluated by the review team is from the accredited land trust; additional information may be provided by the public and still other information may be the result of research conducted by the Commission’s review team. This additional information may relate to the review of more than one accreditation indicator. Relying on multiple sources of information helps ensure credible decisions that maintain the integrity of the accreditation program.

**Commission Research**

The review team may conduct research regarding an accredited land trust. This research may include Web or print searches, documented interviews with individuals knowledgeable about the land trust’s activities, informal visits to conservation properties and/or review of other data. The Commission is well aware that not all news accounts, websites or other reports are accurate or complete, thus affirmative disclosure and explanation of publicly-known issues will assist the Commission in its work.

**Application Review**

The review team examines all of the information it has to determine if the applicant is implementing *Land Trust Standards and Practices* and meeting the accreditation requirements. The review team not only examines an applicant’s written policies (for example, a conflict of interest policy), but also looks for evidence that the policy and accreditation indicators are actually followed (such as by reviewing board meeting minutes from the last time the applicant managed a conflict of interest).

The review team may find the applicant is meeting each accreditation indicator, or it may find that it needs more information and/or that the applicant needs to take corrective action to be in compliance.

- **In making its findings, the review team keeps flexibility in mind.** We are aware that one size does not fit all in land conservation and that there is a wide diversity of approaches that land trusts use to implement the standards. For example, an all-volunteer organization with a board that meets monthly and discusses each project in detail will have different evidence of board review of projects than a staffed organization with an active land committee. Each organization will need to provide evidence of project review, but the Commission expects their approaches to be very different. Commissioners reflect the diversity of the land trust community and use their extensive knowledge to help ensure
that applicants are meeting the accreditation indicators and that the review is flexible and practical.

- **The Commission uses a variety of systems to ensure consistency** in the review process including having staff and commissioners serve on a variety of review teams, using the *Requirements Manual* as a reference, and having feedback systems between staff, commissioners, Commission committees and the full Commission. For more information see the *Saving Land* article, “Collaboration and Consistency: Ensuring Fairness in the Accreditation Process” and the Commission’s “Consistency Checks” diagram.

- **Accredited land trusts commit to implementing the accreditation indicators during their accredited term.** The Commission a) expects compliance with the express parameters of clearly worded indicators throughout the accredited term; and, b) expects compliance at least by the time of renewal with the Commission’s published requirements in effect at renewal. The Commission also expects that an applicant will have met any expectations for improvement received during its initial accreditation or through the compliance confirmation process. If an applicant failed to implement an item identified in the Commission’s current published requirements as being required “at renewal,” depending on the severity of the failure and ability to take corrective action promptly, the Commission may allow an applicant a limited opportunity to correct the noncompliance during the review process. If the applicant has failed to consistently maintain the “at initial accreditation and thereafter” requirements, the Commission may make a decision not to award accreditation. More on “Demonstrating Compliance at Renewal”

**Additional Information Request**

If the review team needs additional information from an applicant or the applicant must take corrective action before a final decision is made on the application, the applicant will receive an additional information request (AIR) explaining the additional information/action needed. If applying with related entities, any additional information requests for the related entities will be included in the one Additional Information Request described above. Applicants will generally be provided with up to three months to respond to the AIR.

If the accredited land trust would like clarification of the additional information request, contact the Commission staff member that is on the review team. On limited occasions the review team may require the applicant to participate in a conference call; in such instances the call record may be part of the applicant’s response to the additional information request.

*If the applicant meets all of the requirements for awarding renewal at the time of application, the review team may recommend that the application proceed to a decision to accredit (with or without expectations for improvement) without an additional information request or additional review steps.*
**Commission Decision**

The Commission makes final decisions on each complete application based on the review team’s evaluation of the applicant’s compliance, during its accredited term, with *Land Trust Standards and Practices* and published program requirements.

The Commission can make one of the following three decisions at the conclusion of the renewal process: award renewal, conditionally renew, or not award renewal. For more information about each of these, [click here](#).

A land trust may appeal a Commission decision to not renew accreditation by following the Commission’s Appeals Policy and Procedures.

**Frequently Asked Questions**

**How soon after the renewal application deadline should we expect an additional information request from the Commission?**

The elapsed time between the application due date and receiving a formal “Additional Information Request” letter from the Commission can range from 6 weeks to four months. Renewal reviews take place according to an internal docket developed after all applications have been submitted for a round; the location of your land trust in that docket determines when the review takes place and when the AIR is sent.

If you have questions about when your land trust should expect its additional information request please contact the Commission. We will give you a specific timeline once our review of your application has begun.

**Accreditation Fees**

Accreditation fees are structured to provide land trusts of all sizes the opportunity to participate in accreditation and to support a program that builds strong land trusts, fosters public trust in land conservation and helps ensure the permanence of land conservation. The accreditation fee consists of a registration fee and an application fee. Please select the accreditation fee schedule below for the year in which you plan to apply; each year’s fee schedule is typically announced in the spring of the year prior. [Click here](#) for the current accreditation renewal fee schedule.

**What will our land trust get from the Commission in return for its accreditation fees?**

Accreditation fees cover much of the costs related to accreditation, including your land trusts’s review. Applying for accreditation motivates land trusts to review and implement procedures to streamline operations and lead to more effective land conservation. Renewing accreditation motivates organizations to confirm they are consistently following national standards and, if needed, to adjust procedures accordingly. A review team of land conservation professionals evaluates your application and provides an information request detailing where...
information or improvement is needed for your land trust to be successful in the accreditation process. Click here for list of many accreditation benefits.

“The Land Trust knew accreditation was an important mark of distinction that would move it to the next level of professionalism. What we didn’t expect were the innovations that came out of the process and how exciting and rewarding the work was when it finally all came together.”

– Patricia Powell, Whidbey Camano Land Trust executive director

How much time does it take a renewal applicant and what are the other costs?

Renewal takes substantially less time than first-time accreditation.

- There are at least 30% fewer attachments requested in the renewal application than in the first-time application.
- Only about half of the attachments in the application for renewal are required for all applicants; the remainder are “if applicable” and depend upon the following:
  - The complexity of the land trust, and
  - Its compliance with the requirements during its accreditation term.
- Documents are uploaded to an online system, rather than copied and shipped.
- On average, fewer projects are examined.

Regarding the time invested by organizations in the renewal process, few organizations provided any data. The information below from recent rounds of applicants is a general guide and your land trust’s experience may vary. Land trusts have also reported costs for other expenses such as having an attorney review policies, temporary staff to complete documents such as land management plans, etc.

- Average Hours: 311
- Range of Hours: 128 – 485

How can my organization minimize the time spent at renewal?

Recently-renewed land trusts offer the following guidance on how to minimize the time needed.

- Address any expectations for improvement as soon as possible and keep documentation of how the EFIs were addressed.
- Review the Requirements Manual and the renewal application at least annually to ensure that the land trust continues to meet all requirements (or to document when and why it did not).
- Participate in continuing education opportunities presented by the Commission, the Land Trust Alliance and land trust service centers.
• Maintain an electronic recordkeeping system for creating and storing records that may be requested as part of the renewal application. (Note: maintaining electronic records is not a requirement for accreditation.)

Why and how often does the Commission adjust the accreditation fees?
Commissioners monitor and review the costs of the land trust accreditation program on an annual basis, and fees are adjusted accordingly to meet anticipated operating expenses. Changes in the fees are approved by the Commission and the Land Trust Alliance. The accreditation program is supported by accreditation fees from applicants supplemented by a small amount of revenue from an endowment established by the Land Trust Alliance (the Commission is prohibited from fundraising).

How do land trust accreditation fees compare to other voluntary accreditation programs?
Land trust accreditation fees are in line with other national voluntary accreditation programs, although there is no direct comparison due to the timing and type of fees assessed. For example, in most accreditation programs the applicant must pay the costs for a visiting site examination team. In the land trust accreditation program, commissioners volunteer approximately 4,000 hours a year reviewing documents and holding “virtual” site visits by telephone in order to keep accreditation fees affordable.

Expectations for Improvement

“Expectations for Improvement” (EFI) may be issued by the Land Trust Accreditation Commission to an accredited land trust as part of the accreditation award letter or through the compliance confirmation process. Expectations are used to foster continuous learning and quality improvement when the Commission determines that an organization needs to do additional work to fully comply with one or more elements of an accreditation requirement. For information on the elements the Commission evaluates for every accreditation indicator, please download and read the Commission’s Requirements Manual.

Renewing applicants must document that the organization has complied with all EFIs issued at the previous accreditation/renewal and any compliance confirmation actions since becoming accredited. Applicants must provide a written statement of how the organization addressed any EFIs as well as provide documentation of implementation for each. The appropriate type of documentation will depend on the specific details of the EFI.

Where to Go for Help

Commission Materials

• Requirements Manual
• The “Help and Resources” section of the Commission website
• Advice from land trusts that have achieved accreditation
Land Trust Alliance Resources

Training
The Land Trust Alliance has developed an affordable curriculum related to *Land Trust Standards and Practices* with special focus on the accreditation indicators. Study can be done online, in person, or with a consultant. Find out more.

The Alliance also offers workshops, seminars, and courses through the Land Conservation Leadership Program, Rally: The National Land Conservation Conference, and Regional Conferences. See the Alliance’s website for more details.

The Learning Center
This is the place to go if you want to hone your conservation skills and grow your organization to its full potential. And it’s free to Land Trust Alliance members. At the Learning Center, you can:

- Review the accreditation indicator elements and narratives
- Learn all the essentials for land conservation
- Take courses on *Land Trust Standards and Practices* or prepare for accreditation
- Design your own learning path on topics such as Governance, Strong Organizations, Land Protection, and Stewardship
- “Ask The Experts” in moderated forums
- Access reference materials in the conservation library (formerly LTAnet)

The Learning Center also contains presentations from conferences, as well as numerous other documents, publications, worksheets, and more. Visit the Learning Center.

Saving Land Magazine
The Alliance’s magazine, entitled *Saving Land*, is the nation’s leading land conservation magazine. Available as a member benefit when you join the Land Trust Alliance, the quarterly magazine offers in-depth stories on the latest land conservation issues, innovations and trends. The magazine also features columns on accreditation, fundraising, board tips, profiles of conservation leaders, resources and timely news, to help you save land even better. From the technical to the inspirational, *Saving Land* magazine presents not just the “how” of what we do, but also the “why.”

Expert Link
*Expert Link* is the Alliance’s online directory in which members of the land trust community can seek out professional assistance from Alliance-member companies. Expert Link is divided into three categories for quick and easy access to a professional partner that best suits your needs: Appraisers, Attorneys, and Consultants.
Publications
The Alliance offers an extensive selection of publications for land trust practitioners. A sample of the selection offered is below:

- Appraising Easements
- The Conservation Easement Handbook
- Doing Deals
- Federal Tax Law
- Land Trust Standards and Practices

See the complete catalog.

State Service Centers
Land trust service centers - also known as councils, service bureaus, coalitions, alliances, and compacts - work closely with the Land Trust Alliance and land trusts to deliver services and technical assistance that strengthen local and regional organizations that conserve open space. Visit www.landtrustalliance.org/state-associations to find a service center in your region.

Maintaining Accreditation
Here are a few steps to help your land trust maintain its accreditation and prepare for its next renewal.

- Implement any Expectations for Improvement.
- Annually review the Requirements Manual.
- Keep track of any unique set of facts and circumstances that resulted in not meeting one of the accreditation indicators or accreditation requirements throughout the accredited term.
- Contact the Commission’s Help Desk if you have questions.

Continuous Improvement
The accreditation program was designed to foster continuous improvement. Accredited organizations are expected to implement Land Trust Standards and Practices. Accredited organizations are also expected to stay current in the field of land conservation, to review annual updates to the Requirements Manual and to continually refine their programs.

Conditions for Maintaining Accreditation
Land trusts applying for accreditation or renewal sign a formal Accreditation Agreement accepting conditions for maintaining accreditation, including the following.

- To comply with the accreditation indicators and program requirements.
- To implement Land Trust Standards and Practices, to be aware of any changes to them, to stay current in the field of land conservation.
• To provide the Commission with information, upon request, regarding your organization’s compliance with the accreditation indicators and program requirements.
• To notify the Commission in writing of major changes in your structure or operation that could potentially affect your organization’s intent and ability to comply with the accreditation indicators or accreditation requirements.

Notification
A land trust must notify the Commission in writing of any major change in its structure or operation that could potentially affect its intent and ability to comply with Land Trust Standards and Practices and accreditation requirements. Changes that require written notification include the following:

• Change of scope of activities (such as when an organization that only accepted fee properties at the time of accreditation takes on conservation easements, or when an accredited land trust that had not completed any new transactions during its accredited term completes a new transaction after having been awarded renewal).
• Transformation of governance structure (such as mergers, changes in a parent organization, etc.).
• Significant changes in mission (such as taking on activities that are counter to land conservation or eliminating the organization’s land conservation program).
• Legal actions taken against the land trust or settlement of actions pending at the time of accreditation.
• Change of tax-exempt or charitable status.
• Other changes that may result in the land trust’s no longer implementing Land Trust Standards and Practices and accreditation requirements.

Other changes that may trigger the need to inform the Commission would include circumstances such as expanding the land trust’s service region from a small area to a much larger area, completing a series of transactions during the accredited term (either easement or fee) when the land trust had not completed a recent transaction for evaluation prior to being awarded accreditation, or otherwise substantially expanding the scope of the organization.

Finally, accredited land trusts must notify the Commission of any changes to the land trust’s contact information, particularly the accreditation contact information.

Confirming Compliance
The Commission can request additional information from an accredited land trust during its accreditation term to confirm compliance with Land Trust Standards and Practices and accreditation requirements. The ability to confirm compliance enables the Commission to assure the public that all accredited land trusts meet the accreditation requirements. For more information see the Commission’s Compliance Confirmation Policy and Procedures.
**Disciplinary Action**

While extremely rare, an accredited land trust can be placed on probation and accreditation can be revoked according to the Commission’s Disciplinary Action Policy and Procedures. This policy helps maintain the integrity of the accreditation program for all participants.
Accredited land trusts qualify for a growing list of valuable discounts and benefits

A sampling of federal, state, and county benefits to accredited land trusts from across the nation:

- Funding from project proponents seeking LEED certification using the credit for “protecting or restoring habitat” certification element
- Option for recognition as a “certified entity” for the USDA Agricultural Land Easement Program when certain criteria are met
- Automatic eligibility to hold easements with California’s Sustainable Agricultural Land Conservation Program (supported by the Greenhouse Gas Reduction Fund)
- Expedited certification in Louisiana where land trusts must be certified to hold and conserve certain mineral interests
- Expedited certification in Colorado when working with landowners desiring a state tax credit for a conservation easement donation
- Exclusive access to funding when leveraging the Buffer Lands Program in Texas for projects near or adjacent to Texas state parks
- Exclusive access to easement funding when leveraging the Marin County, CA, farmland protection program
- Automatic eligibility to apply for funding in Chester County, PA, for its Brandywine Headwaters Preservation Program

GuideStar Recognition:
Accredited land trusts receive an external review with a five-star rating from the Commission. You can also list your accreditation in GuideStar and specify that you received your accreditation from the Land Trust Accreditation Commission.
Alliance-member accredited land trusts qualify for valuable discounts:

**Conservation Defense Insurance:** Accredited land trusts are automatically eligible for an annual premium discount of $11 per insured unit when they enroll in the conservation defense insurance program offered by Terrafirma Risk Retention Group LLC. The average accredited land trust has 93 units; if it insures all with Terrafirma over the accredited term it will receive a Terrafirma discount of $5,115 ($1,023 annually).

**Directors & Officers Insurance:** Accredited land trusts that are Alliance members will receive an additional 7% renewal premium credit (subject to the applicable rates filed in each jurisdiction) in addition to the preferred rates already enjoyed by those with standard membership status when they secure Directors & Officers liability insurance from the Chubb Group of Insurance Companies.

“Blue Hill Heritage Trust has expanded rapidly, both in acres conserved and organizational capacity, over the last few years. The accreditation process gave us the foundation—the institutional structures—we needed to be successful during this growth.”

*Hans M. Carlson, executive director, Maine*

“Knowing the accreditation process is comprehensive and reliable gives us confidence that a land trust accreditation applicant is a good long-term investment.”

*Mary Anthony, executive director of the 1772 Foundation*

See the full list of known public and private benefits and funding incentives for accredited land trusts:
http://www.landtrustaccreditation.org/about/benefits-of-accreditation

Thank you to the Land Trust Alliance for its investments in the accreditation program and in building the capacity of its land trust members, including accredited land trusts.

Front page (l-r): Kachemak Heritage Land Trust; Jerry and Marcy Monkman, EcoPhotography, Society for the Protection of New Hampshire Forests; Back page (l-r): Tar River Land Conservancy; Sagebrush Steppe Land Trust
Your investment in accreditation strengthens the land trust movement

- Shows your land trust’s commitment to sound finances, ethical conduct, responsible governance and lasting stewardship
- Connects your land trust to a select network of land trusts committed to excellence
- Builds partner and donor confidence in the land trust community

“Our land trust is glad to be a part of the accredited land trust community. We are all stronger together, aligned in our approach, and able to relate to each other better knowing we speak the same language of best practices.”

Joe Rising, Communications Coordinator, The Prairie Enthusiasts, Wisconsin

“When the movement was young, the systems were invented on the fly. There’s been a natural progression over time: develop, promote, then require Standards and Practices. It’s part of the maturation of the movement.”

Foundation Executive

Accredited Land Trusts

Better positioned to protect, defend and steward land

8x more money set aside for stewardship and defense*

Your investment in accreditation keeps you on the leading edge

- Strengthens your land trust
- Engages your board and staff
- Ensures your land trust stays current with best practices
- Better positions your land trust to defend and steward its land

“The process itself will make your organization stronger, better, and more focused. Be bold and never look back!”

Jill Bays, President, Transition Habitat Conservancy, California

Accreditation is both a roadmap for how to do things right, and an affirmation that we’re working at the leading edge of land conservation.”

Steve Cook, General Counsel, Columbia Land Trust, Washington

The Impact of Land Trust Accreditation

In 2003 the Land Trust Census revealed the land trust community was unprepared to meet its promise of perpetuity. Only 16% of land trusts had conservation defense funds and many did not annually monitor their land and easements. In 2004 Congress became concerned, leading the Land Trust Alliance to create the Land Trust Accreditation Commission in 2006.

Today, the network of more than 400 accredited land trusts is made up of strong, respected leaders in their communities with the resources to forever steward the conservation lands entrusted to them.
“'In perpetuity' is a weighty responsibility. Staying true to the accreditation standards gives peace of mind that we can deliver on that promise. Accreditation is not an end point; it is a continuous learning process for our staff and board of directors, and lets our conservation easement landowners, supporters, and the public know that we hold ourselves to the highest standards.”

Cathy Dombi, Executive Director, Southern Oregon Land Conservancy, Oregon

“‘Our acres conserved headed sky high after we were accredited. This speaks to the virtues of accreditation.’

Bob Stokes, President, Galveston Bay Foundation, Texas

Your investment in accreditation pays you back

• Save more land
• Raise more money
• Attract more volunteers
• Qualify for valuable discounts and benefits

Accredited Land Trusts

Raise more money

55% more financial supporters*

$ double their budgets*

Attract more volunteers

3X more volunteers*

*As compared with eligible not-yet-accredited land trusts. Data is based on the Land Trust Alliance’s 2005, 2010, and 2015 Land Trust Census.

Contact us for more information on partnering with the Land Trust Accreditation Commission, the impact of accreditation and the process.

36 Phila St, Suite 2
Saratoga Springs, NY 12866
info@landtrustaccreditation.org
www.landtrustaccreditation.org
518.587.3143

Front cover (l-r): Linda Besler, Mountain Area Land Trust; Southwest Michigan Land Conservancy; Back cover (l-r): Rosemary Mosco, Mass Audubon; Douglas Land Conservancy; The Nature Conservancy Pine Butte Swamp Preserve

Land Trust Accreditation Commission
An independent program of the Land Trust Alliance