First-Time Applicant Handbook

A Land Trust's Guide to the First-Time Accreditation Process

Excellence · Trust · Permanence

All current applicant information is on our website. This First-Time Applicant Handbook compiles essential instructions from the website in one location for your convenience.

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

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

36 Phila Street, Suite 201, Saratoga Springs, NY 12866

Last Updated April 2016

Table of Contents

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 more than 75% of all land under conservation easement or owned in fee by land trusts, ensuring the promise of perpetuity.

Land trusts seeking to achieve or renew accreditation submit detailed documentation to the Commission. Applications are rigorously reviewed by professional accreditation staff and volunteer commissioners from the land trust community.

The Commission awards accreditation to land trusts that meet national standards for excellence, uphold the public trust and ensure that conservation efforts are permanent. 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.

Get to know the Commission

- Commissioners and Staff
- Notice of Accreditation Decisions
- List of Accredited Land Trusts
- Annual Reports
- Start the Conversation
- Success Stories

"The success of every charity depends on public trust, and this is especially important for the land conservation groups that handle billions each year in tax incentives, public funds, and charitable gifts. The new land trust accreditation program gives land trusts, like universities, hospitals, and museums, the opportunity to be publicly recognized for their excellence and ethics.'"
— Diana Aviv, President and CEO, Independent Sector

Not all of our donors care if we are accredited, but some definitely do. They want to be associated with high-functioning non-profits that deliver results. Yes, accreditation is a huge investment in time and effort, but it an investment that pays back on many levels.

— Doug Sensenig, Executive Director, Coastal Mountains Land Trust

The Accreditation Seal

A mark of distinction in land conservation

The accreditation seal is a mark of distinction in land conservation. 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.

Excellence

Accredited land trusts meet national quality standards for protecting important natural places and working lands forever. These land trusts demonstrate their commitment to excellence by adopting *Land Trust Standards and Practices,* the ethical and technical guidelines for the responsible operation of a land trust, and meeting the accreditation requirements drawn from them.

Trust

Nonprofit organizations, including land trusts, are increasingly called on to demonstrate their accountability to the public. Accredited land trusts have voluntarily submitted their organizations to an external, independent review of their practices. As a result, accreditation provides the public with the assurance that the land trust displaying the accreditation seal meets established standards for organizational quality and permanent land conservation.

Permanence

Land trusts help conserve land that is essential to our health and well-being. When land trusts agree to protect land for the benefit of the public, in most cases they do so by promising that the protection is forever. The accreditation program verifies that the land trust has the policies and programs in place to keep this promise, either by caring for the land itself or transferring the land to an entity that can.

"When people see that the Gallatin Valley Land Trust has once again earned the seal of accreditation, they have a deeper respect and confidence in us and our work. This is important for the success of our organization and our ability to conserve land in our region. The seal represents the very best of who we are and what we do."

Penelope Pierce, Executive Director, Gallatin Valley Land Trust

Benefits of Accreditation

The accreditation seal is a mark of distinction among the more than 1,200 Alliance-member land trusts across America. 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."

As the public demands more accountability from government and nonprofit organizations, including land trusts, independent accreditation provides third-party assurance of quality and permanence of land conservation. That is what the public and donors look for: public recognition of a land trust's ability to protect important natural places and working lands forever.

Applying for accreditation affords land trusts the opportunity to review and implement policies and procedures that help streamline operations and lead to more effective land conservation. Renewing accreditation fosters continuous improvement and enables organizations to confirm they are consistently following national standards and meeting current requirements.

Recent surveys of accredited and renewed land trusts noted the following with respect to accreditation:

- 100% report the process strengthened their land trust.
- 100% report it strengthened their organizational and transaction records.
- 100% report accreditation helps the land trust community maintain the trust of Congress, the Internal Revenue Service and the public.

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 some of the following tangible benefits.

"Accreditation ensures that the special places we have and will conserve in the future will be preserved for the next generation. And we believe if these places are important enough for us to protect, then they are important enough for us to do it right."
- Freshwater Land Trust (AL)

Click here for PDF of the latest infographic detailing the value of accreditation renewal for accredited land trusts.

"Accreditation is important in showing the communities we serve that our organization has a solid foundation and delivers a professional program. It will give landowners additional confidence to work with us to permanently conserve their land, and assure donors that their support is well-placed."
- Coastal Mountains Land Trust (ME)

Policies

Below are links to policies that have been adopted by the Commission.

1	**Accreditation Application Final Decisions**
2	**Appeals**
3	**Commission Research on Applicants and Accredited Land Trusts**

4	**Compliance Confirmation**
5	**Confidentiality**
6	**Conflict of Interest**
7	**Deadlines and Exceptions for Catastrophes**
8	**Disciplinary Action**
9	**Feedback, Comments and Complaints**
10	**Gift Acceptance**
11	**Land or Easements Accepted from Other Organizations**
12	**Mergers and Affiliations**
13	**Multiple Corporations and Accreditation**
14	**Requirements for Land Trusts with Multiple Corporate Structures or Corporate Combinations**
15	**Site Visits**
16	**Website Privacy**

The Requirements Manual

The *Accreditation Requirements Manual: A Land Trust's Guide to Understanding Key Elements of Accreditation* 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 requirements are based on indicator practices 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.

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 a subset of practices called "indicator practices." Each indicator practice has its own subset of requirements; requirements are the verifiable elements of an indicator practice that must be met by each applicant at either first-time accreditation, first renewal, and/or each subsequent renewal.

The *Requirements Manual* is a compendium of all requirements, and lets land trusts know how they are going to be evaluated at each point in the application process and for each indicator practice, 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 indicator practice or other practices 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 confirming compliance with the indicator practices. The process starts with a committee looking at comments from the land trust community as well as issues identified in applications throughout the year. The Commission approves the annual *Requirements Manual* edition each spring.

We announce the availability of the newest edition with emails, webinars and other outreach, highlighting changes and giving advance notice for changes that will 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.

How do the requirements account for flexibility?

Each accredited land trust must show how it meets each indicator practice; 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 often saves applicants time by avoiding additional information requests during the accreditation 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.

First-Time Accreditation Process and Instructions

Welcome to first-time accreditation! We have been told that the process of applying for accreditation can sometimes be overwhelming, and yet gratifying once accreditation is achieved. In this section of the website we strive to make it as easy as possible to explore and understand the process and requirements. Take a look around, and if you still have questions, contact us today.

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.

Getting Ready and Registration

You've done the hard work, and now it is time to receive the recognition! Through the voluntary land trust accreditation program your land trust can have external verification that it is meeting national quality standards.

Preparing and applying for first-time accreditation will take a significant commitment of time from the board and staff (if applicable). Each land trust should consider when it would be most appropriate for their organization to apply for accreditation and balance accreditation with their other program activities. In many cases this may mean incorporating accreditation into a long-term strategic plan and/or planning to apply after more immediate organizational or program needs are met.

Organizations should not apply until they are able to complete the entire application and assemble all documents. Substantially incomplete applications will be returned and the fees forfeited. Organizations should expect that it will take several months of internal review and discussion before the application is complete and ready to submit. Applicants should plan accordingly.

Note: Land trusts that submit an application in one year will have a decision from the Commission no earlier than the following year, as the process takes 8-10 months from the time the application is submitted. Please factor this into your planning process.

Eligibility and Requirements

Applying for accreditation, whether for the first time or as applicant for renewal, is a decision your land trust should not make lightly. Accreditation is an investment in your land trust’s operations and is also a commitment to the entire land trust community that you will do your part to uphold Standards and Practices and to foster public confidence in land conservation.

To know when accreditation might be right for your land trust it helps to understand the basic requirements for each step.

Registration

Registration is the first step in the accreditation process (read more). Potential applicants must demonstrate that they meet the eligibility and registration requirements in order to proceed to the pre-application step.

Registration eligibility requirements:
Accreditation is available to all U.S.-based 501(c)(3) tax-exempt public charities and quasi-governmental organizations that:

- actively acquire and/or steward conservation land or conservation easements,
- have been incorporated (or formed as a trust) for at least two years, and
- have completed at least two direct land or easement acquisition projects. *In a direct land or easement acquisition project the applicant organization was included in the chain of title on a fee parcel or was the grantee of a conservation easement.*

Pre-Application

At the time of pre-application a land trust must provide a detailed Land Conservation Project List as well as basic information about the organization and a number of required attachments. Applicants must demonstrate that they meet pre-application requirements in order to proceed to the application step. Read more >>

Pre-Application Requirements:
A complete pre-application and all required attachments.

- In addition, an applicant must demonstrate the following at the time of pre-application:
  - That each conservation easement has a baseline documentation report.
  - That each conservation easement has a record of at least two consecutive years of annual monitoring or a record of at least three years of calendar-year monitoring.
  - That each fee property has a management plan or management summary.
  - That each fee property has been periodically inspected.

The *Requirements Manual* describes how a land trust can demonstrate that it meets these pre-application requirements.

Application

The application is the culmination of a land trust's efforts to complete the application questionnaire and gather all supporting documentation. Details on the application requirements can be found in the *Requirements Manual* and in the application itself. Read more >>

Application Requirements:
A complete application questionnaire.

- Evidence that the applicant is meeting each of the indicator practices by including:
  - All required attachments indicated on the Master Attachment Checklist, and
  - The project documentation indicated on the Project Documentation Checklist.

The *Requirements Manual* describes how a land trust can demonstrate that it meets application requirements for each indicator practice.

Frequently Asked Questions

We are ready to apply now, but our land trust is only a year old. Why do we have to wait?

The eligibility requirements clarify for applicants, funders and the public that it takes time for new organizations to create the systems needed to carry out the indicator practices and that there is no expectation that new organizations will earn accreditation right away. While an applicant must have completed at least two direct land conservation projects to be eligible and have documentation for the Commission to verify the applicant's practices, no applicant that has only completed two projects has been awarded accreditation.

Preparation

If you're thinking about accreditation, below is a general overview of what is involved.

The land trusts that have achieved accreditation say the process is challenging, but a smart investment. They say that they are stronger and more efficient, have improved the confidence of landowners and funders, gained recognition from their communities, and ensured the long-term success of their organizations.

Phase I: Conduct an Assessment

A first step in implementing *Land Trust Standards and Practices* and eventually applying for accreditation is conducting the required assessment against the full set of standards. It helps to be frank and honest in the assessment. Implementing an action plan that charts a course to the improvements identified by the assessment is essential. Many land trusts are using the Pathways to Accreditation website to do the assessment online. Read more >>

Phase II: Test Yourself with the *Requirements Manual*, Application and Checklists

When the improvements identified in the assessment are complete and/or your land trust thinks it can demonstrate compliance with the accreditation indicator practices, test this assumption with a careful review of the Application, Master Attachment Checklist and Project Documentation Checklist, available here. Read each indicator practice and the lists of required documentation you will be asked to submit. Identify if each document exists, where it is, and if it is of sufficient detail to demonstrate compliance. Most groups who go through this the first time find gaps. The next step is to develop and implement a plan to fill those gaps.

Phase III: Put Your Application Team Together and Register to Apply!

When an organization is confident that it can demonstrate that it is meeting the practices, it should begin the process by registering to apply. Next you can put together the accreditation team and start pulling all the materials together!

If you are ready to apply, the *Applicant Handbook* is a must-read. It provides detailed information on the program requirements and application process. If your organization needs information on how to document implementation of the indicator practices, the Requirements Manual is essential. For assistance with assessments or advice on how to implement the indicator practices, the Land Trust Alliance's online tool, The Learning Center, is a good place to start.

The Commission also hosts free webinars throughout the year on the accreditation process and makes those presentations available for download on our website.

Wherever your land trust is on its journey, we wish you success. Please contact us if you have questions about the accreditation program.

Start the Conversation

Looking for a way to start a conversation at your land trust about applying for accreditation? Then check out our new video featuring accredited land trusts discussing the benefits of accreditation. The video features several land trusts that have successfully navigated the accreditation process and have emerged stronger and more effective as a result. We hope that land trusts across the nation will show the video at their board and staff meetings to start the conversation about accreditation.

- Download the video to take to your next meeting [right-click and select 'Save Link As': Windows Media Player file]
- Share the video by visiting our YouTube channel.

Once you've watched the video, read our Getting Started fact sheet to help guide your land trust's journey to accreditation and view the recorded Introduction to Accreditation webinar designed to familiarize your staff and/or board members with the accreditation process.

The Importance of Accreditation: A Discussion with Volunteer-Led Land Trusts

New to our suite of tools for land trusts considering accreditation: a PowerPoint presentation “The Importance of Accreditation” and companion script . This downloadable presentation is intended for use by board members of volunteer-led land trusts to generate interest in and support of pursuing accreditation (or renewal) while recognizing the unique challenges that volunteer-led land trusts face. Much of the content is based on conversations with several volunteer-led land trusts that have successfully completed the process.

Top 3 Pieces of Advice from Applicants

1.Take the self-assessment seriously.

2.Do not apply until you are fully compliant and have set up and implemented your policies, practices and files accordingly.

3.Make sure you have the time, money and right people to tackle the application.

For more advice from accredited land trusts, click here.

Registration

Registration for available slots in a round for first-time accreditation is generally open in the spring of the year prior.

1. **For complete details about the information requested on the registration form, payment methods, etc., click here.**
2. **For the "Are You Ready" checklist, click here.**
3. **For the Benefits of Accreditation fact sheet, click here.**
4. **Ready to register? Click here.**

Before Registering

Before completing the registration form, someone from your organization should be familiar with the first-time accreditation sections of following documents:

- *Applicant Handbook (includes information on eligibility and readiness, tips for getting started, how to complete the application, what to expect once an organization has applied, and Commission policies and procedures)*
- *Requirements Manual (includes information on how to document implementation of the indicator practices; this is updated annually)*
- Accreditation Fee Schedule *(the accreditation fee schedule includes details regarding the both the registration and the application fees)*
- Are You Ready checklist

Application Rounds and Due Dates

Click here for information about specific application rounds and due dates.

Note: Land trusts that submit an application in 2016 will have a decision from the Commission no earlier than 2017, as the process takes 8-10 months from the time the application is submitted. Please factor this into your planning process.

Expressing Informal Intent for Future Years

Organizations that would like to express their intent to register for a future year may do so by completing a short online survey. For complete details about the letter of intent process see page 2 of the Commission Fact Sheet. *Note: Land trusts that submit an application in one year will have a decision from the Commission sometime in the following year, as the process takes 8-10 months from the time the application is submitted. Please factor this into your planning process.*

Renewal Registration

If your organization is already accredited and is preparing for renewal, note that the Commission will send registration information specific to your organization generally six months of its pre-application due date. The information on this registration page does not apply to your organization if it is already accredited and it is applying for renewal of accreditation; please do not try to register or submit a letter of intent using these systems. Click here for more information about the renewal process.

Pre-Application and Attachments

Each applicant for first-time accreditation is required to submit a complete pre-application questionnaire with all required attachments. The pre-application materials enable the Commission to verify that applicants meet basic program requirements before they submit a complete application. Data from the pre-application is used by the Commission to select projects for which the applicant will need to submit detailed documentation with its application. Applicants for accreditation submit a pre-application approximately 10 weeks before their complete application is due.

Pre-Application Questionnaire

Pre-Application Attachments

Submitting Your Pre-Application

Commission Review of Pre-Application

Frequently Asked Questions

Pre-Application Questionnaire

The Pre-Application Questionnaire asks basic questions about your organization. Review the pre-application questionnaire and secure the requested information.

> *Tip: If applying with related entities, also review and prepare the relevant pre-application Addendum for Multiple Corporations (see sidebar).*

Now is a great time to download the Time Tracking Form and start tracking the time you are spending on preparing your pre-application and application materials.

Pre-Application Attachments

- **PreApp1** Page 1 of the most recently filed Form 990 (or Form 990-EZ or Form 990-N, as applicable) [Please include page 1 of the actual form, not the e-file or accountant cover page.]
- **PreApp2** Evidence of the completion of an assessment against the full *Land Trust Standards and Practices* - Read more >>
- **PreApp3** Land Conservation Project List(s) - The Commission requires that the LCPL data be no older than three months prior to the pre-application due date. Read more >>
- **PreApp4** Schedule of Dedicated and Restricted Funds - Read more >>
- **PreApp5** Accreditation Agreement - (Last three pages of the Pre-Application Questionnaire). *The Accreditation Agreement obligates the organization to abide by the terms and conditions of the accreditation program. It should be signed by an individual with the authority to enter into contracts on behalf of the organization.*
- **PreApp6** Articles of Incorporation - *Include your organization's recorded, original Articles of Incorporation and all amendments and/or restatements.*
- **PreApp7** Final tax determination letter from the Internal Revenue Service
- **PreApp8** (If applicable) If your organization is not a land trust member of the Land Trust Alliance, provide a board resolution adopting the 2004 version of *Land Trust Standards and Practices*. Please use the resolution included in Standards and Practices.

Submitting Your Pre-Application

Your organization's Pre-Application Questionnaire and all attachments must be received by the Commission no later than the due date. *This is not a postmark deadline – please plan ahead to make sure your submission arrives in the Commission's office by that date.* Applicants must provide the Pre-Application Questionnaire and all attachments electronically on a CD/DVD/USB. Mail or ship your organization's pre-application materials to the Commission's office : Land Trust Accreditation Commission, 36 Phila Street, Suite 2, Saratoga Springs, NY 12866.

> *TIP: If you are submitting your pre-application or project documentation data electronically on CD, files must have path names of no more than 64 characters, whereas files on hard drives and networks can have path names exceeding 200 characters!*

When submitting your organization's pre-application, check to ensure that it includes the following documents in the format indicated.

- **Pre-Application Questionnaire** Format: Microsoft Word
- **Land Conservation Project List(s)** Format: Microsoft Excel
- **Schedule of Dedicated and Restricted Funds** Format: Microsoft Excel
- **Other Required Attachments** Format: PDF

Commission Review of Pre-Application

The Commission reviews each pre-application for first-time accreditation. The review evaluates the pre-application with respect to the pre-application requirements and is not predictive of future success in the application process. The pre-application materials are used by the Commission to:

- confirm that an applicant meets specific program requirements before it is allowed to proceed and submit a complete application
- select projects for which the applicant will need to submit detailed documentation. Read more >>

Pre-Application Acceptance and Project Documentation Request
Applicants are notified at least five weeks before the application due date whether their pre-application was accepted and will at that time receive a list of projects for which the Commission will need to see project documentation. The project documentation is submitted along with a complete application and all attachments. An invoice for the balance of the fee will also be sent at this time; fees are due at the same time as the application.

Public Notice
Once the pre-application is accepted, an applicant must notify key stakeholders that they are applying for accreditation and provide copies of the notice(s) with their complete application. Read more >>

Project Selection and Documentation

Every applicant must provide project documentation as part of the application. The projects are selected by the Commission and shared with the applicant in the pre-application acceptance letter. Each set of project documentation must include a Project Documentation Checklist; the checklist is an integral part of the project documentation.

Overview

The number of projects selected depends on how many projects in each category – conservation easements or fee properties – your organization holds at time of pre-application.

Number of Projects Selected

The number of projects selected for an application 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.

We will cap the number of projects we select at six, unless there is an extraordinary circumstance, and select the number of projects as follows. For each category of holding (conservation easement and/or fee ownership):

1–25 holdings = up to 2 project files in this category
26–50 holdings = up to 3 project files in this category
51–100 holdings = up to 4 project files in this category
101–200 holdings = up to 5 project files in this category
>200 holdings = number determined on a case-by-case basis

Project Documentation Checklist

The documents requested for each project are listed in the Project Documentation Checklist. Read more >>

Frequently Asked Questions

Can we redact confidential landowner information from our project documentation?

Documentation for practice 10B includes Forms 8283. The Forms must include the landowner's name, but the Commission strongly encourages you to redact the social security or tax identification number. If the land trust has a copy of the supplemental statement filed with the Form 8283, please include it as well.

When would the Commission select the maximum number of projects for a category (fee or easement)?

The Commission may select the maximum number of projects in a category for a variety of reasons, such as when organizations have 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 our land trust did not complete any new projects in the past ten years, will it have to provide any project documentation at all?

Yes. If your organization did not complete any recent transactions, it will have to provide limited documentation as described on the project documentation checklist. Should your organization be awarded accreditation, you may be required to notify the Commission if you complete a transaction and submit project documentation for review under our compliance confirmation process.

When do we find out which projects were selected for inclusion in our application?

Within five weeks of the application due date.

Can we select an additional project?

We choose projects that we believe illustrate a range of your conservation properties. However, you are welcome to 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.

Pre-Application Frequently Asked Questions

Why would an organization's pre-application be rejected?

The Commission may decide that an applicant should not proceed if the Commission determines any of the following:

- the applicant does not meet the eligibility and registration requirements;
- the applicant does not meet the pre-application requirements;

- the applicant is not primarily engaged in the active acquisition or stewardship of conservation land or conservation easements;
- the applicant would not be able to document compliance with the indicator practices and/or is not a strong candidate for accreditation;
- the pre-application documents are in unacceptable condition; or
- the pre-application is not otherwise able to be processed effectively.

Applicants will be notified of this decision at least five weeks before the application due date. If the Commission determines that an applicant will not proceed, the organization will need to reregister when it is ready to apply. The registration fee is nonrefundable and nontransferable.

When were the pre-application materials most recently updated?

The pre-application materials for accreditation were last revised February 2015, and the changes apply to land trusts pursuing accreditation in 2015 round 2 onward. Click here for a tracked-changes version. The changes involved removing the requirement for a map, dropping the request for certificate(s) of good standing and replacing with an attestation that the organization is in good standing, and no longer requiring Alliance land trust members to provide the board resolution adopting *Land Trust Standards and Practices*. In addition, the pre-application questionnaire was modified to remove several questions that required unnecessary time-intensive research on behalf of applicants.

How do you use the time-tracking information we will provide with our follow-up materials?

Although this form is optional, we appreciate the efforts of land trusts who track the time it takes to complete the renewal process; aggregate data is shared with accredited land trusts and others to help provide guidance on how long it may take to complete the process. We will request a copy of the completed form at the conclusion of the renewal process, and it need only be provided if the land trust opted to track the time.

Documenting an Assessment against *Land Trust Standards and Practices*

All applicants for accreditation must demonstrate that they completed an assessment against all *Land Trust Standards and Practices*. Why?

- Assessments conducted in advance of applying for accreditation will help land trusts identify areas they may need to work on before submitting their application.
- Completing periodic assessments against the full set of practices helps land trusts set benchmarks for continuous improvement.
- If your land trust's assessment is more than three years old, a new assessment will help measure progress against your past benchmarks and meet the application requirements for accreditation.

Overview and Tips

Conducting the Assessment

Documenting the Assessment

Read Frequently-Asked-Questions

Overview and Tips

A land trust seeking accreditation must show that it has completed an assessment against all of the Standards and Practices. For first-time applicants the assessment date of completion must not be older than three years from the date of the pre-application, and the assessment must be documented as part of the pre-application (acceptable documentation is further described below).

Conducting the Assessment

There are a number of ways to approach the assessment process; a few possible approaches are outlined below. *In all instances, the Commission will want to know that the board was involved in the assessment or at least reviewed the results.*

- Your land trust can complete a self-assessment independently or use a trained facilitator.
- If your land trust has staff, a team of staff members might complete the assessment first and share the results with the board in a facilitated discussion.
- The land trust may use existing board committees to assess the land trust against practices related to the function of the committee.
- The land trust may complete an assessment against one standard and associated practices at each board meeting, continuing until it has completed the assessment against all Standards and Practices.

The most commonly-used tool available to land trusts is Assessing Your Organization (AYO), a workbook published by the Land Trust Alliance. *See "Frequently Asked Questions" below if using another tool.*

TIP: The assessment must be against all practices from *Land Trust Standards and Practices*, not just the indicator practices or other subsets.

TIP: Alliance member land trusts can access an online version of the AYO on Pathways to Accreditation. (A download of the AYO is also available from The Learning Center.) The AYO can also be ordered online or by calling the Alliance at 202-638-4725.

Documenting the Assessment

There are a number of ways to approach the assessment process. Your land trust can complete a self-assessment or use a trained facilitator. If your land trust has staff, they might complete the assessment first and share the results with the board in a facilitated discussion. The Commission will want to know that the board was involved in the assessment or at least reviewed the results.

If your land trust used the AYO as the basis for its assessment, evidence that the assessment was completed may be one of the following:

- Minutes from the board meeting recording the discussion about the results of the AYO and the date of completion.
- The agenda from a retreat where the AYO was discussed.
- The AYO summary pages and the date of completion.
- A report or statement from a consultant (if a consultant was used to conduct the assessment) indicating when and how the AYO assessment was conducted.
- A board resolution indicating when and how the AYO assessment was conducted.

See "Frequently Asked Questions" below if AYO was not used.

Frequently Asked Questions

Do we have to use the Alliance's AYO tool to conduct the assessment?

Applicants are not restricted to conducting the assessment with the AYO and may use any tool that includes an assessment against the full Standards and Practices. If your land trust did not use the AYO, the Commission will need to see a copy of the completed assessment tool (including an indication of the date it was completed and who was involved) along with a cover page that identifies how the assessment addressed each of the practices in Standards and Practices.

When do we have to complete the assessment?

Applicants for first-time accreditation must include evidence of the assessment with the pre-application.

In our application materials do we give you the date the assessment was started, or the date it was finished?

Please provide the date the assessment was finished (i.e., presented to the land trust or the land trust's board).

We completed an assessment just recently, but it will be "too old" by the time we submit our application. Do we have to do it all again from scratch?

No. Your land trust can simply review the results of the previous assessment, note any changes in practices since that time, and update the assessment to reflect current information and new date of completion.

Schedule of Dedicated and Restricted Funds

A completed Schedule of Dedicated and Restricted Funds ("SDRF"; Excel file) must be submitted with each first-time pre-application; a copy is also requested as part of the application.

Overview and Tips

Download the SDRF Template and Instructions

Watch the SDRF Video Tutorial

Frequently-Asked-Question

Overview and Tips

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 first-time 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: Detailed instructions for completing the SDRF are located in the Excel file.

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 I realize some of the data on my submitted SDRF is out-of-date or wrong?

We examine the pre-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 pre-application we cannot confirm that your land trust meets the funding requirements, we will let you know as part of the pre-application acceptance letter to give you the opportunity to confirm that the data in your pre-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 total of funds available for general stewardship of holdings without property-specific funds.

Do we have to meet stewardship funding requirements for our non-conservation properties (such as tradelands with no conservation values)?

No.

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

Applicants must notify key stakeholders that they are applying for accreditation and provide copies of the notice(s) with their complete application.

Overview

Conducting Public Notice

Template Public Notice Form

Documenting Public Notice

Read Frequently Asked Questions

Overview

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. 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 the indicator practices.

The Commission accepts comments from the public on pending applications; comments on pending applications 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.

Conducting Public Notice

Below are commonly-considered stakeholders and possible outreach methods to meet the public notice requirements. Your land trust may choose to implement one or more of the outreach methods listed below (or other methods not listed) for each category of stakeholder (internal and external).

We will review the notice materials to determine that the applicant made a reasonable effort to inform stakeholders about their application for accreditation.

Internal Stakeholders	**Possible Outreach Methods**
Board and advisory committee members	Broadcast email, printed newsletters, meetings, webpage item coupled with outreach directing readers to website, other methods that achieve the same outcome
Staff	
Key volunteers	
General members and/or donors	

External Stakeholders	Possible Outreach Methods
Elected officials	Press release to area newspapers, printed newsletters, postings on appropriate listserves, webpage item coupled with outreach directing readers to website, personal letters or meetings, public notices, other methods that achieve the same outcome
Public agencies	
Area residents	
Community organizations	
Conservation groups	
Land trust networks or coalitions	
Abutters to actively managed or highly used land trust properties	

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 the indicator 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

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, 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.

Frequently Asked Questions

When should we conduct our public notice?

Notice must be completed by the time the complete application is submitted. The notices sent by applicants must include information on how interested parties can comment, a reminder that comments must relate to the indicator practices and a target due date – 45 days after the application due date. Download a template public notice form

When do we document that we completed our public notice?

Include copies of the notices, along with a short summary of who was notified and when, in your application. The Commission will review the notices to confirm that one or more stakeholder groups were notified. The application is not complete without copies of the notices.

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

Applicants do not need to go to great expense to meet this requirement. For example, paid notices and/or advertisements, special color-printed notifications, etc., are not required.

What if a negative comment is received about our land trust?

The following principles guide the Commission's public comment process.

- Comments are only accepted in writing, via email, or through our website.
- All comments must be attributed. If the comment is shared with the land trust, the name of the commenter is kept confidential.
- Comments must relate to the land trust's implementation of *Land Trust Standards and Practices* and accreditation requirements. The Commission does not intervene in internal disputes within accredited land trusts, disputes between land trusts, and disputes between land trusts and other individuals or agencies.

All comments are shared with the review team. If a comment indicates that a land trust may not be in compliance with the indicator practices, the substance of the comment is shared with the applicant and the applicant is given an opportunity to respond. Public comments are not the sole determining factor in an accreditation decision but may lead to a request for additional information and follow-up depending on the substance and nature of the comment.

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.

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

Application and Project Documentation

A complete application and all required attachments must be provided from each applicant to demonstrate that the organization is meeting all of the accreditation indicator practices and program requirements.

- Application Questionnaire
- Application Attachments
- Project Documentation
- Submitting Your Application
- Frequently Asked Questions

Application Questionnaire

The application questionnaire and corresponding Master Attachment Checklist are designed to gather information on how an applicant carries out the indicator practices from *Land Trust Standards and Practices*. The application questionnaire is an Adobe PDF form. It consists of a series of questions (short-answer or yes/no). An applicant's responses to those questions will either result in no action or result in a request for an attachment.

TIP: Please note that if your organization has a related entity, such as a supporting organization or an LLC, there is important information about the application for accreditation from your organizations. An organization should understand the application requirements prior to registering to apply for accreditation. More details and application addenda are available in the Application Toolkit to the right.

Application questions requiring a response are preceded by a question-mark icon in the questionnaire for first-time application; the questionnaire is an Adobe Acrobat PDF form.

Application Attachments

Master Attachment Checklist

The Master Attachment Checklist is a guide for applicants to organize application attachments. Like the application, the checklist is an Adobe PDF form. The checklist should be the first document in the binders you submit, and it will serve as the Table of Contents for your application. It is organized as your application binders should be organized, including tabs for the following:

- **Tab: Application Questionnaires** This section has your completed questionnaires. Reviewers will repeatedly go back and forth between this section and the attachments. Being able to easily find the questionnaires helps the reviewer.
- **Tab: Preliminary Attachments** These attachments provide introductory information about your land trust and its conservation work.
- **Tab: Master Policy Documents** If your organization has a large policy manual, such as a board manual or land protection manual, that you refer to often throughout the application, you may prefer to include it in this section in its entirety. This is optional, however it may also make it easier for you to refer back to the document's location in your written answers.
- **Numbered Tabs 1–12** (for Attachments for Standards 1–12) These sections contain all of the material required to document compliance with the indicator practices, organized by standard.
- **Completing the Checklist** In the column labeled "Check," applicants should check off those items that are included in their application. In the column labeled "Location," applicants should note the tab where the attachment is located. If the title of the actual document is different from the one on the checklist, there is space for you to indicate the proper title on the checklist under "Document Name." Unless noted as if applicable (in response to a question on the application questionnaire), all documents on the checklist are required unless it would be clear to a reviewer that they do not apply to your organization.

Numbering and Labeling Attachments

Each attachment has been assigned a standard number by the Commission. Please do not change the numbering system! The document number on the Master Attachment Checklist should appear on your corresponding attachment. There are a number of ways applicants can label the attachments.

- Pre-formatted and numbered labels are available for download from the Commission's website.
- Applicants may type or hand-write the name and date of the document and the relevant practice(s) on a sheet of paper just before the attachment. (This may also serve as a divider; see below.)
- You may simply hand-write on the top of the attachment the name and relevant practice(s).

Separating Attachments
Materials related to each standard should be separated by numbered tabs 1-12. Within each standard, applicants should signal to reviewers that an attachment is in response to a new question or the next practice. The simplest way to do this is to use colored sheets of paper as dividers. Applicants may wish to use numbered mini-tabs to separate practices, but this can increase expenses.

TIP: It is preferred that attachments not be stapled as staples make it more difficult for reviewers to flip between documents.

Documents That Apply to More than One Practice
Your organization may have some policies, procedures or checklists that contain information that applies to more than one question in the application or indicator practice. There is no need to attach them twice. For subsequent references to the same document, simply note the tab location and title of the document in the appropriate location of the Master Attachment Checklist. This is helpful, for instance, if a document in Tab 3 is also used by your organization to demonstrate implementation of standards 6 and 11. You only need to attach it once in Tab 3; in standards 6 and 11 you would refer back to Tab 3.

TIP: The application requests copies of appraisals for practices 9J and 10B. To reduce copying expenses, you may include the appraisal summary in the application itself and provide the full appraisal on a CD/DVD/USB. For more information on formatting electronic submissions, click here.

TIP: Documentation for practice 10B also includes Forms 8283. The Forms must include the landowner's name, but the Commission encourages you to redact the social security or tax identification number. If the land trust has a copy of the supplemental statement filed with the Form 8283, please include it as well.

Project Documentation Checklist

The Project Documentation Checklist contains a list of all possible required documentation that should be available for a specific type of conservation project. The checklist, a stand-alone form, serves as the table of contents for each set of project documentation and should be duplicated for each project.

To compile your project documentation, review the checklist and identify the documents on the checklist that you have for the project in question. Note on the checklist any comments that will help reviewers understand the project. Here are a few examples of how the checklist helps identify the documents that should be provided for a project.

- A donated conservation easement completed in the past year should have documentation for the following practices on the checklist: practice 3F, practice 5A, practice 8B, practice 9H, practice 10B (if the donor had claimed a tax deduction), practice 11A, and practice 11B.
- A purchased conservation fee property completed in the past year should have the following documentation for the following practices on the checklist: practice 3, practice 5A (if the donor had claimed a tax deduction in the case of a bargain sale), practice 8B, practice 9H, practice 9J, practice 10B (if the donor had claimed a tax deduction in the case of a bargain sale), practice 12A, and practice 12C.
- In addition, projects completed within the past five years will have more robust documentation than projects completed twenty years ago.

Once you have identified the list of documents that are available for the project, secure each document and indicate the corresponding indicator practice number on the cover.

Please provide the documents that exist for the property at the time of your application. Land trusts should not create new documents for the purposes of augmenting the application! Falsification of documents (such as presenting recently-completed documentation as a contemporaneous to an older project) will result in accreditation not being awarded.

- Project Documentation Checklist (***for best results, right-click and save to your computer; once saved, open Adobe Acrobat Reader and navigate to the file to open it) then open from within Adobe Acrobat***) (updated 9/2/14). Note: a completed Project Documentation Checklist is required for each selected project.

Submitting Your Application

Maximum Binder Size
When it comes to binders, commissioners and staff have learned that bigger is not necessarily better! Large binders often become unwieldy and are more likely to break during shipping or use. As a result, the Commission has set the maximum allowed binder size (ring size) at three inches. Please do not overstuff binders.

Paper versus Electronic
Unless otherwise noted, all material submitted to the Commission must be submitted on paper. In those cases when the Commission encourages electronic submissions (the pre-application, appraisals for 9J and 10B in the application, project documentation and follow-up materials), applicants may submit the requisite number of copies on a CD/DVD/USB. We generally do not accept material via email.

Contents of a Complete Application
Check to make sure your application is complete! Previous applicants recommend having a non-team member review the entire application and all attachments once it is ready for submission to the Commission. Three copies of the application questionnaire, statements and attachments must be submitted on paper.

TIP: The application does not need to be printed in color; color is used in the application simply for applicants' benefit.

TIP: Did you copy all the pages of your attachments? For example, make sure you do not submit just the odd-numbered pages of your bylaws!

Shipping
Complete applications must be delivered to the following address:

Land Trust Accreditation Commission
36 Phila Street, Suite 2
Saratoga Springs, NY 12866

You may send your application using whichever method of shipping is most economical and convenient for your organization. Plan ahead to ensure that your application arrives at the Commission office by the application due date. It is strongly recommended that you select packaging that is sturdy and secure and use a shipping method that allows you to track the package. You should keep a copy of the entire application for your reference.

Fees
The accreditation fee is also due at this time but will be invoiced separately by the Land Trust Alliance. Please follow the payment instructions on the invoice; payment is mailed directly to a lockbox and <u>not</u> to the Commission office.

Frequently Asked Questions

When was the first-time application last revised?

In April 2013 the Commission revised the first-time application materials, as a result of program developments and feedback from applicants. That was the second time since the program's inception that the materials were revised.

Do you have any sample copies of the types of correspondence we should expect to receive from the review team?

To help better prepare applicants for the process, the Commission released three sample documents you might expect to receive during the first-time accreditation process. The first is a sample agenda for the applicant's call with the Commission review team; the second is a sample follow-up letter requesting additional information (this letter is typically sent within a few weeks after the call); and the third is a sample award letter to a newly accredited land trust, including expectations for improvement. These documents are not intended to reflect the length of actual call agendas, follow-up letters or award letters, but are intended to show questions, requests and expectations that have appeared in actual documents. View the sample documents (PDF):

- Sample Agenda for Applicant Call with Commission Review Team
- Sample Follow-up Letter
- Sample Accreditation Award Letter

Review Process and Commission Decision

A review team of one or more commissioners and a Commission staff member reviews each complete application in detail. Most of the information evaluated by the review team will be provided by the applicant; additional information may be provided by the public and still other information may be the result of research conducted by the Commission. This additional information may relate to the review of more than one indicator practice. Relying on multiple sources of information helps ensure credible decisions that maintain the integrity of the accreditation program.

- Commission Research
- Application Review
- Applicant Call

- Follow-Up Request
- Commission Decision

Commission Research

The review team may conduct research regarding an applicant. This research may include Internet 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 in the application 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 each indicator practice. The review team not only examines an applicant's written policies (for example, a conflict of interest policy or amendment policy), but also looks for evidence that the policy and indicator practice are actually followed.

The review team may find the applicant is meeting each indicator practice, or it may find that it needs more information or that the applicant would need to take corrective action to be in compliance. *See our guidance on demonstrating compliance in the* Requirements Manual.

- **In making its findings, the review team keeps flexibility in mind.** There is a wide diversity of approaches that land trusts use to implement the standards.
- **Commissioners reflect the diversity of the land trust community** and use their extensive knowledge to help ensure that applicants are meeting the practices 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 "Consistency Checks" diagram.

Applicant Conference Call

The review team will hold one phone call with the applicant to give the applicant an opportunity to answer questions the review team may have about the application.

While the review team may have questions related to a particular practice, it does not necessarily mean that the applicant needs to provide additional information or take further action! In many cases, only verbal clarification of information submitted is needed.

> *TIP: This call will be scheduled in advance at a date and time that works for all parties.*
>
> *TIP: Applicants will receive a detailed call agenda approximately one week prior to the scheduled call detailing the questions the review team would like to discuss.*
>
> *TIP: One the call is scheduled, the applicant may want to block some time about six days prior to the scheduled date to review the call agenda and assign the appropriate people to join the call and respond to specific questions. Participation from board members is strongly encouraged and appreciated.*

<u>Site Visit</u>: The Commission uses site visits as a check on the document-based process and to verify organizational practices or land conservation work on the ground. The site visit may replace the applicant conference call. No site visits are planned at this time.

Follow-Up Letter

After the conference call, the review team will follow up with the applicant in writing. The follow-up letter provides applicants with a limited opportunity (generally one to three months) to provide additional information or to take corrective action necessary to confirm compliance. Once the follow-up information from the applicant has been received, the review team will complete its review and it will make a recommendation on the application to the full Commission.

- If applying with related entities, any additional information requests for the related entities will be included in the one follow-up letter described above.
- At this time we will also request a copy of the First-Time Applicant Time Tracking Form. *This form is optional; it need only be provided if the applicant opted to track the time. We appreciate the efforts of land trusts who track the time it takes to complete the application process; aggregate data is shared with accredited land trusts and others to help provide guidance on how long it may take to complete the process.*

Commission Decision

The Commission can make one of three decisions at the conclusion of the first-time application process: not award accreditation, table an application (in limited circumstances) pending further information, or award accreditation. For more information about each of these, click here.

Useful Documents

Land trusts planning and preparing for accreditation must download and read each of the following documents prior to beginning, and **have a copy of each readily available** throughout the application process:

- The *Applicant Handbook* (revised June 2012), which includes information on the renewal process
- The *Requirements Manual* (revised April 2014), which augments and replaces the information previously published in the Commission's *Guidance Documents* and now provides, all in one manual, information on the elements the Commission evaluates for every indicator practice
- The Application for Accreditation (***for best results, right-click and save to your computer; then open from within Adobe Acrobat***) (revised April 2013), which outlines all questions and describes each statement and attachment requested in the application for first-time accreditation

For your convenience in completing forms required for accreditation, below are individual templates for your use:

- Pre-Application for Accreditation (due approximately three months prior to the application)
- Land Conservation Project List (required as part of the pre-application and application)
- Schedule of Dedicated and Restricted Funds (required as part of the pre-application and application)
- Master Attachment Checklist (***for best results, right-click and save to your computer; then open from within Adobe Acrobat***) (required as part of the application)
- Project Documentation Checklist ***(for best results, right-click and save to your computer; then open from within Adobe Acrobat)*** (updated 9/2/14; one is required for each project selected by the Commission)
- Time Tracking Form (this form is optional; it will be requested by the Commission and need only be provided if the land trust opted to track the time.
- (If applying with related entities) Addenda for related entities
  - Addendum for Multiple Corporations – Basic
  - Addendum for Multiple Corporations – Intermediate
  - Addendum for Multiple Corporations – Complete

Interested in examples of what might be provided in a statement? View our Sample Application Statements examples.

To assist you in preparing and assembling your application, we have provided the following templates for your convenience.

- Template Application Attachment Labels (Avery 5160/8160)
- Template Application Statements (formatting)

Sample Review Correspondence from Commission to Applicant

To help better prepare applicants for the process, the Commission released three sample documents you might expect to receive during the first-time accreditation process. The first is a sample agenda for the applicant's call with the Commission review team; the second is a sample follow-up letter requesting additional information (this letter is typically sent within a few weeks after the call); and the third is a sample award letter to a newly accredited land trust, including expectations for improvement. These documents are not intended to reflect the length of actual call agendas, follow-up letters or award letters, but are intended to show questions, requests and expectations that have appeared in actual documents.

- Sample Agenda for Applicant Call with Commission Review Team
- Sample Follow-up Letter
- Sample Accreditation Award Letter

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.

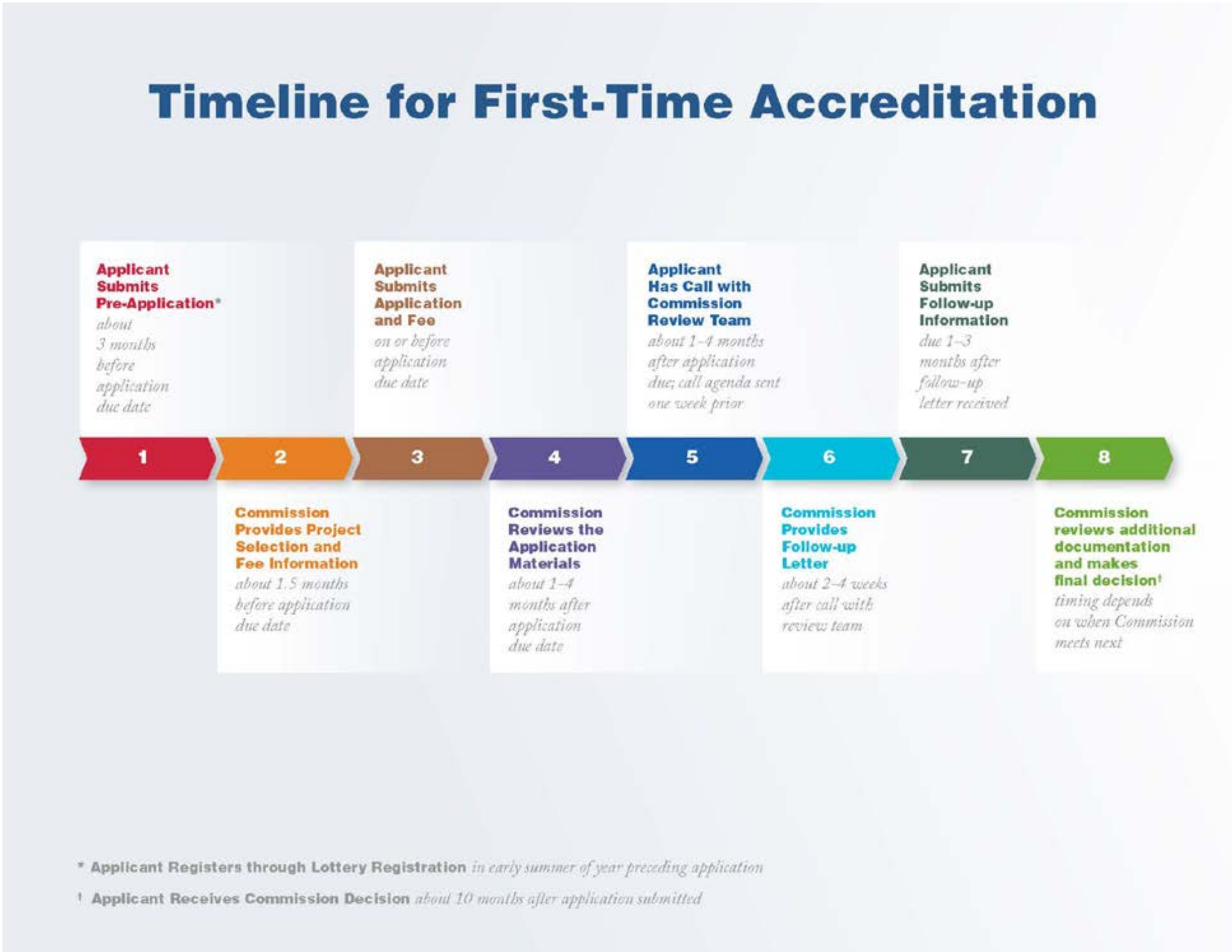
Click here to select the accreditation fee schedule below for the year in which you plan to apply; each year's fee schedule is typically announced in the spring of the year prior.

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

A dedicated review team comprised of commissioners and staff with extensive experience in land conservation who will evaluate your land trust's practices on board governance, land and easement acquisition, stewardship, defense, and more! After the review team finishes reviewing your application materials and ensures that it has a complete picture of your practices, each applicant receives a detailed additional information request (sometimes referred to as an improvement plan) that, once implemented, will help your land trust achieve accreditation and the right to display the accreditation seal.

See additional frequently asked questions about accreditation fees »

> *"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*



Timeline and Costs

Thinking of applying for accreditation? Before you begin, check out the "Are You Ready" checklist. For specific information about the costs of accreditation and the timeline, see below.

Costs

Click here for specific information about accreditation fees and other direct costs.

Timeline

Prior to committing to accreditation, each land trust should ensure it has a team of people who can dedicate the time to prepare and complete the pre-application, the application, and requested project documentation. Also, ensure that your accreditation team is available during the accreditation application process (at least through the response to the follow-up information request), which takes 8-10 months from the time the application is submitted. For instance, land trusts that submit an application in 2016 will have a decision from the Commission no earlier than 2017. Please factor this into your planning process.

Commission Training Resources

Online Training Opportunities

The Commission strives to provide informational and training opportunities to land trusts that are pursuing accreditation, on topics ranging from how to prepare an effective and complete application to how to meet the documentation requirements for the indicator practices. It is important to note that the Commission's training opportunities generally focus on the accreditation processes and documenting your organization's implementation of the indicator practices (as described in the *Requirements Manual*). The Land Trust Alliance's training opportunities are more vast and diverse, providing people involved in conservation work with opportunities to advance their success through unique learning and networking programs in communities all across the country.

Scheduled Webinars and Conference Calls

Webinars are workshops on the web; they allow participants to view a slideshow over the internet while also participating in a conference call. All you need to participate is a phone line and a reliable internet connection. Most webinars are 60 minutes in length. Click here.

Webinars Available On Demand

The Commission has recorded a number of webinars that are available on demand. Each webinar is about 60 minutes and consists of a narrated PowerPoint presentation that can be advanced or replayed as needed. Viewers can also see the text chat history of each webinar and see the responses to some commonly asked questions. Select any topic of interest to you, below, to get started. Click here.

Video Tutorials

NOW AVAILABLE: video tutorials for renewal applicants.

In-Person Training Opportunities

The Commission strives to provide informational and training opportunities to land trusts that are pursuing accreditation on topics ranging from how to prepare an effective and complete application to how to meet the documentation requirements for the indicator practices. Some of these opportunities are provided in person (at Rally: The National Land Conservation Conference and at regional land trust conferences) but most are provided online via webinars and conference calls. Whether you are already registered to apply or are just learning about the accreditation program, we hope to provide useful information on the program through these activities and to provide an opportunity for you to ask your burning questions. We also welcome your ideas; please send suggestions for future informational and training topics to info@landtrustaccreditation.org.

It is important to note that the Commission's training opportunities generally focus on the accreditation processes and documenting your organization's implementation of the indicator practices (as described in the *Requirements Manual*). The Land Trust Alliance's training opportunities are more vast and diverse, providing people involved in conservation work with opportunities to advance their success through unique learning and networking programs in communities all across the country. The Alliance's training focuses on all of the practices from *Land Trust Standards and Practices* (not just the indicator practices) in addition to convening land trusts for training and learning about other, cutting edge topics.

Click here for in-person events that are presented by the Commission.

Fact Sheets

Download these fact sheets for more information on the Commission. All fact sheets are downloadable PDF documents unless otherwise noted.

- Benefits of Accreditation

- List of Accredited Land Trusts
- About the Accreditation Seal
- Frequently Asked Questions about Expectations for Improvement
- Land Trusts and Quasi-Governmental Organizations
- Land or Easements Accepted from Other Organizations (Web Page)
- Mergers and Affiliations (Web Page)
- Multiple Corporations and Accreditation (Web Page)

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 indicator practice. Read Frequently Asked Questions about EFIs. To see trends on commonly issued EFI's, please see the 2014 Report on Expectations for Improvement. For information on the elements the Commission evaluates for every indicator practice, please download and read the *Accreditation Requirements Manual: A Land Trust's Guide to Understanding Key Elements of Accreditation*.

Each month in 2012 the Commission introduced a commonly issued EFI and discussed factors that might result in an EFI at accreditation. Since renewing land trusts need to show that they have met any EFIs they received at first-time accreditation, we also discussed documentation accredited land trusts might provide at renewal to show how the expectation was addressed.

Common Expectations for Improvement

- Practice 2C. Tax Exemption
- Practice 3F. Board Approval of Land Transactions
- Practice 4A. Dealing with Conflicts of Interest
- Practice 5A. Legal and Ethical Practices
- Practice 6B. Financial Records
- Practice 7A. Capacity
- Practice 8B. Project Selection and Criteria
- Practice 9J. Purchasing Land
- Practice 10B. Appraisals
- Practices 11A. Funding Easement Stewardship and 12A. Funding Land Stewardship

Note that each accredited land trust is expected to comply with all of the accreditation indicator practices and to maintain documentation of compliance throughout its accreditation term, to conduct periodic assessments against the full set of *Land Trust Standards and Practices* and to use them as a guide for the organization, to stay aware of and demonstrate compliance with current program requirements (as identified in the Commission's *Requirements Manual),* and to abide by the terms of the Accreditation Agreement submitted at the time of pre-application.

Land Trust Alliance Resources

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

The Alliance also offers workshops, seminars, and courses through the Land Conservation Leadership Program, Rally: The National Land Conservation Conference, and Regional Conferences.

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:

- 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 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 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.

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*

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.

The Learning Center also contains presentations from conferences, as well as numerous other documents, publications, worksheets, and more. Visit the Learning Center at http://tlc.lta.org.

For more information or to ask questions, email info@lta.org or call 202-638-4725.

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 result in not meeting one of the indicator practices 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 learn and 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 indicator practices 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 indicator practices 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 indicator practices or program requirements. *See more below*.

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 program 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 program requirements.

We also request that accredited land trusts notify the Commission of any changes to the land trust's contact information.

Confirming Compliance

The Commission can request additional information from an accredited land trust during its term of accreditation to confirm compliance with *Land Trust Standards and Practices* and program requirements. The ability to confirm compliance enables the Commission to assure the public that all accredited land trusts meet the program 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.

Working with the Adobe PDF Form

Introduction
The *Application for Land Trust Accreditation* is available as an Adobe PDF form. This sheet provides information on the technical aspects of using the form. Detailed instructions for answering the application questions, compiling the application and understanding the application process is found in the *Applicant Handbook.*

MAC Users
The Adobe PDF form was created using Adobe LiveCycle, and is not compatible with the MAC operating systems. Until Adobe solves this incompatibility, please see the section below, "Where to Go for Help."

PC Users: Required Software
To successfully view and use the Adobe PDF form, **you will need Adobe Acrobat Reader 9.1 or later**. This is a free program that can be downloaded at: http://get.adobe.com/reader/.

Accessing and Saving the Required Adobe PDF Forms
The first-time Accreditation Application, Master Attachment Checklist, and Project Documentation Checklist are available on the Commission's website. You need to download and save each to your computer's hard drive or organization's network so that you may work on them over time. Print and include your final Application Questionnaire with your application.

> To download each file, right-click on the application's link and select the "Save target as…" option [or "Save Link As…" in Mozilla Firefox Internet browser] and save it to your desired location. (Depending on how your individual computer is set up, it may download to your desktop or other location automatically.)

Using the Forms
You can only enter text inside the form fields. To more easily view the form fields on your computer, select the "Highlight Fields" option in the upper right-hand corner of your screen and each form field will be lightly highlighted.

Position your cursor inside a form field to enter text or check a box. You may use the tab key to move from field to field, or simply use your mouse to click inside the field in which you wish to enter information. The way the form works, the data you enter is not actually accepted into the form until you go the next field.

<u>To Advance to the Next Field</u>
- Press Tab to accept the form field change and go to the next field; OR
- Using your mouse, position your cursor in the next form field and left-click once.

<u>To Go Back to the Previous Field</u>
- Press Shift+Tab to go to back to the previous field.

<u>To Escape</u>
- Press Escape to reject the form field change and deselect the current form field.

Tips for Using the Adobe Forms
- Adobe PDF forms can get large in size. As a result, tasks like tabbing and pasting from other documents may take longer than you expect. Have patience! Saving your work often is recommended. You may also want to consider routinely printing your application, or saving an electronic backup to another location.

- If you enter a lot of text into a field it will scroll down as you type and it will look like your data does not fit in the field. However, once you move to the next field the previous field will expand.

- You can copy text from other sources (such as Microsoft Word documents) and paste the text inside the form fields.

- You cannot use formatting functions inside the form fields (such as bold, italics, tables, justification, etc.), nor will formatting appear once it is pasted inside the form fields. Bullets may be pasted into the form fields; however, any indenting will not work.

- You can make hard returns inside the form fields to separate paragraphs.

- To check the spelling in your responses, simply right-click in the field and select “Check spelling.” Be sure to click “Done” otherwise your changes will not appear. You must spell-check each individual field; you cannot check the entire document.

- If you lose your place in the form, you can use the Edit→Find function. A small window will appear on the toolbar and you can enter the practice number or other text you wish to find and hit Enter.

- If you find that a text box simply won’t work for you, simply type up your response on a separate sheet of paper and include it with your application.

Master Attachment Checklist
The Master Attachment Checklist will be the first document in your first-time application binder. It serves as the Table of Contents for your application. This is a separate stand-alone form. Download the form and save it to your hard drive or network, as you did the application. You are free to add items not listed on the checklist. If you have additional attachments, click on “Add Another Document” and another row will appear.

Project Documentation Checklist
You will need a completed Project Documentation Checklist for each project requested by the Commission. This is also separate stand-alone form. Download the form and save it to your hard drive or network, as you did the application. To create a copy of the checklist for another project, either save a Project Documentation Checklist for each project, or click on the “Add Another Project Checklist” button. It will add a blank checklist to the end of the document. Be sure to enter the name of each project after “Project Name.” If you wish to add additional documents or offer explanations on the checklist, use the form field at the end of each section.

Where to Go for Help
The Commission provides these Adobe PDF forms to make entering data easier for applicants. If you have trouble working with the form, please let us know right away. You may also try contacting Adobe support (http://www.adobe.com/support/contact/). If you are simply not able to work in Adobe, we have a Microsoft Word version available. However, this version has no formatting or form fields and pilot applicants found it difficult to work with. You can reach us at info@landtrustaccreditation.org or 518-587-3143.