Renewal Applicant Handbook

A Land Trust's Guide to the Renewal Accreditation Process

Excellence • Trust • Permanence

As of April 2016
All current applicant information is on our website. This Renewal Applicant Handbook compiles essential process information 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
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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.

A Mark of Distinction

The accreditation seal AFFIRMS national quality standards are met.

- ✓ Sound Finances
- ✓ Strong Transactions
- ✓ Excellent Land and Easement Stewardship
- ✓ Effective Governance

> *"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.

Renewal Process and Instructions

Welcome to renewal of accreditation! The process for applying for renewal is different than the process used for first-time applicants. This section of our website provides a step-by-step introduction to renewal.

We know that the process of applying for renewal can sometimes be confusing. 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.

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.

Purpose of Renewal

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

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

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

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

Curious about how the renewal process and requirements have evolved since inception in 2012? Click here for information about program improvements and lessons learned, and how they shaped the current program.

Getting Ready and Registration

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

This section of the website explores how and when to prepare for renewal, and also provides information on how the registration process works as your accreditation renewal nears.

Getting Ready

When to begin preparing for renewal

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

- **Immediately**: Most land trusts that achieve accreditation for the first time are also issued "Expectations for Improvement" (EFIs); some land trusts are issued EFIs as part of a compliance confirmation process. It is never too soon to think about how your land trust will address EFIs! Review any EFIs your land trust received; address right away any EFIs for creating templates, updating templates, etc. and create a strategy for identifying opportunities to address any other EFIs that are more situational. Document when progress is made to address them. View the Expectations for Improvement web page.
- **Immediately**: Sign up for and read our eNewsletter, which contains important news and tips on particular standards and practices.
- **Annually**: Read the Requirements Manual annually to become aware of and better understand changes to the indicator practices and requirements that were published after your land trust was accredited (for example, practice 6D. Financial Review or Audit and practice 9H. Title Investigation).
- Download a more comprehensive "Workplan for Renewal".

Starting the Conversation

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

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

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Registering for Renewal

Registration serves many purposes:

- Confirms your organization’s intent to renew.
- Ensures the Commission has your land trust's current contact information.
- Identifies any related corporations that will be part of your pre-application and application.

Registration for a renewal round generally opens six months prior to the application due date.

Required Registration, Pre-Application and Application Dates

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

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

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

The Registration Process

The following are key points about the registration process for renewal.

- **It's online!** The entire renewal process (including registration) is completed entirely online via http://landtrust.civicore.com. For your convenience, we have created a User Manual you can download and review; the User Manual describes the registration process in detail. Watch the short tutorial: Introduction to Civicore and Application Registration.
- **It's easy!** The specific information asked for in the renewal registration form is detailed in the User Manual referenced above. At registration, your land trust also pays the renewal registration fee.
- **We will send a reminder!** Four months prior to your land trust's pre-application due date, the primary accreditation contact for your organization will receive an email to alert him or her to begin the renewal process and with a link required for registering.

Frequently Asked Questions

How will our land trust know approximately when it will have to register for renewal?

Here is a general rule; contact the Commission for specific dates.

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

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

To confirm or change your accreditation contact send an email with the updated information to the Commission.

If you have questions, please email the Commission or call 518-587-3143.

Let Us Know What's Changed...

Please notify the Commission of any major changes in your land trust's structure or operation. Why? Because some changes could affect your land trust's ability to be successful at renewal, or prevent you from receiving important information about your renewal.

Complete this form to let us know about changes to your organization name, structure, accreditation contact, etc. and we'll be in touch.

Pre-Application and Attachments

The renewal pre-application is part of the online application system. Each applicant for renewal is required to complete a pre-application questionnaire and submit the required pre-application attachments electronically. Applicants for accreditation submit a pre-application approximately 8 weeks before their complete application is due.

- Pre-Application Questionnaire
- Pre-Application Attachments
- Submitting Your Pre-Application
- Video Tutorial: Completing the Pre-Application Questionnaire and Attachments
- Commission Review of Pre-Application
- Project Documentation and Attestation Verification Items Request

Pre-Application Questionnaire

The Pre-Application Questionnaire asks basic questions about your organization's land conservation activities, related entities (if any), and potential conflicts of interest with current staff and commissioners. (For your planning purposes, a reference copy of the pre-application questionnaire is an appendix in the User Manual.)

Tip: If applying with related entities, it is important to review the reference copies of the Addendum for Multiple Corporations – Basic and the Addendum for Multiple Corporations – Intermediate (as applicable). Each applicable entity must submit the required information as part of the primary applicant's pre-application in accordance with the Commission's policy.

Tip: Now is a good time to start tracking your time for the Renewal Time Tracking Form. 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.

Pre-Application Attachments

The pre-application requires the following attachments.

- **Your land trust's most recent Form 990** (or Form 990-EZ, or Form 990-N).
  - Used to determine the accreditation application fee, and is also evaluated as part of the application review process.
  - Please include all completed Schedules, Statements and Attachments that accompanied your organization's Form 990 (or Form 990-EZ) filed with the Internal Revenue Service (not the public inspection version).
- **Renewal of Accreditation Agreement.** Your land trust must download, sign and submit a scanned copy of the signed Accreditation Agreement as part of your pre-application.
  - The Accreditation Agreement obligates the organization to abide by the terms and conditions of the accreditation program. It also obligates the Commission to abide by its confidentiality policy.
  - It should be signed by an individual with the authority to enter into contracts on behalf of the organization.
- **Land Conservation Project List (LCPL).** The LCPL must be submitted electronically as part of your pre-application.
  - Read more >>
  - Video Tutorial: Completing the Land Conservation Project List

Submitting Your Pre-Application

Details on how to submit a pre-application using the online system can be found in the User Manual and in this Video Tutorial: Completing the Pre-Application Questionnaire and Attachments.

Failure to submit a complete pre-application by the deadline will make your organization ineligible to participate in that accreditation round. *Click here for information about penalties for failure to meet required due dates prior to the expiration of your organization's accredited status.*

Commission Review of Pre-Application

The Commission reviews each renewal pre-application to a) select projects and attestation verification items for inclusion in the main application, and b) calculate the accreditation application fee due at time of application. Staff may also review the LCPL and contact your land trust to try to resolve gaps in LCPL data prior to the application due date.

Project Documentation and Attestation Verification Items Request

At least five weeks before the application due date, applicants receive a list of projects for which the Commission will need to see detailed documentation, and the list of attestation verification items. These documents are submitted along with a complete application and all attachments. An invoice for the balance of the application fee will also be sent at this time; fees are due at the same time as the application.

TIP: At this time applicants must notify key stakeholders that they are applying for accreditation, and be prepared to provide copies of the notice(s) with their complete application. Read more >>

Land Conservation Project List

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

- Overview and Tips
- Download the LCPL Template and Instructions
- Watch the LCPL Video Tutorial
- Frequently-Asked-Questions

Overview and Tips

The LCPL provides the information we need to:

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

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

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

TIP: The LCPL data provided must be no older than three months prior to the pre-application due date.

TIP: If your land trust maintains its own database, it may be more convenient for you to download the data from your database and use that as the foundation for your LCPL information. In that instance, you can bypass using the Commission's LCPL template; however, you must ensure that your data is presented in an Excel spreadsheet and contains the same columns as indicated on the Commission's LCPL template.

Frequently Asked Questions

What if some of the data on my submitted LCPL does not demonstrate that we meet the requirements?

We examine the pre-application data closely as part of our review in part to identify issues that would result in your pre-application not being accepted; particularly, we are confirming:

- 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 conservation fee property has a management plan or management summary.
- That each conservation fee property has been periodically inspected.

If we cannot confirm all of the above statements as described in the *Requirements Manual*, we will contact you and give you the opportunity to confirm that the data in your pre-application is accurate, or to provide updated, accurate information. If you do not meet the pre-application requirements, the pre-application may not be accepted.

What if we have easements other than conservation easements?

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

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

No, you do not.

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

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

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

If your organization does not currently hold any conservation fee properties or conservation easements, but meets the eligibility requirements for accreditation because it has been in the chain of title on at least two projects, you need to complete a modified LCPL, available upon request from the Commission. *This requirement applies only to those organizations that hold no properties or easements at the time of pre-application but otherwise meet the eligibility requirements because of involvement in the chain of title on past projects.* Please note that the number of projects selected will correspond to the volume of transactions completed and the length of time the properties were held. Your organization will have to show compliance with all applicable indicator practices.

Project Selection and Documentation

Every applicant must provide project documentation as part of the application. The projects are selected by the Commission, and applicants are encouraged to provide one additional project that it believes represents its best work during its accredited term. Each set of project documentation must include a Project Documentation Checklist; the checklist is an integral part of the project documentation.

- Overview
- Number of Projects Selected
- Project Documentation Checklist
- Frequently Asked Questions

Overview

The number of projects selected at renewal depends on how many projects in each category – conservation easements or fee properties – your organization completed during its accredited term. Because many requirements at renewal are verified with project documentation, the Commission may select a larger number of projects to review at the time of application for renewal than it did for first-time accreditation. However, generally we will not select more than six projects and will use the following to guide the number of projects selected. Projects will be chosen from those completed, or for which there were amendments or violations acted on, during your land trust's accredited term.

Number of Projects Selected

The number of projects selected for an application for renewal will generally be capped at four (two easements and two fee properties); additional projects may be selected if the land trust had a large volume of acquisitions during its accredited term.

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 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.

Would the Commission ever select more than six projects?

The Commission may select more than six projects for a variety of reasons, such as when organizations have completed a large number of projects over their accredited term, have a variety of unique projects or have multiple interlocking corporations holding land. The review team may also request documentation for more projects if it believes this information is needed to make an accreditation decision. Note: additional fees may apply for the review of more than six projects.

If our land trust did not complete any new projects during our accreditation term, will it have to provide any documentation at all?

If your organization did not complete any transactions during its accredited term, the Commission will not review project documentation as part of your application for renewal. It will, however, confirm stewardship of older projects through selection of monitoring reports and baseline documentation reports. Should your organization be awarded accreditation for a subsequent term, you will be required to notify the Commission if you complete a transaction. The Commission may review project documentation from the transaction under its 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, along with any attestation verification requests.

Can we select an additional project?

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

Attestations and Verification

To reduce applicant time and costs accreditation renewal relies on attestation and self-disclosure, which is verified through documentation submitted during the process. However, data from the first two years of renewal application reviews show that nearly 70% of renewal applicants had one or more areas where their application responses could not be verified in the supporting documentation. Read below for information on how you can help ensure your land trust's renewal application is accurate and save your land trust substantial time in the application process.

- Overview
- Disclosure: An Easy Path or a Rocky Path
- Verification of Application Responses
- Watch the Attestations and Verification Video Tutorial
- Frequently Asked Questions

Overview

When an applicant submits its renewal application, it attests that "the material provided in this application is an accurate reflection of our organization’s policies and operations." The process utilizes this attestation and corresponding verification to evaluate a number of indicator practices. Attestations help reduce the amount of documents an applicant must submit with the application and are used when statements are readily verifiable.

There are two types of attestations:

- Questions that require the land trust to confirm that current documents of a certain type (baseline documentation reports, management plans, monitoring reports, etc.) do or do not contain specific required elements.
  - If your land trust can confidently respond "yes" or "always": great!
  - If you cannot, you have two options:
    - Update the document(s) in question to add the missing elements and then respond "yes" to the question.
    - Respond "no" or "not always" to the question and upload a supporting statement explaining what required elements are missing and why, and any actions you are taking to address the missing elements. This will greatly help the review team and save you time later - see the examples below.
- Questions that require the land trust to disclose instances, since it last applied for accreditation, whether or not it followed Standards and Practices and/or accreditation requirements. Again, please see the examples below.

Tip: Keep track of instances during your accredited term when Standards and Practices were not followed; this will make it easier to prepare for renewal.

Disclosure: An Easy Path or Rocky Path

The renewal process works best when a renewal applicant accurately responds to each attestation and, as needed, provides explanations and documentation related to noncompliances over its accredited term. On the flip side, the renewal process is substantially more tedious and time-intensive when renewal applicants inaccurately complete attestations and the review team has to follow up to understand why and how deep the issues are.

Let's explore what can happen when an attestation is accurately answered and when the same attestation is answered inaccurately by another applicant. We will use the question at practice 9H: "Since its last application for accreditation, has your organization always investigated title prior to each acquisition of a conservation easement or fee property?"

Disclosure: An Easy Path	Non-Disclosure: A Rocky Path

A land trust did not investigate title for one project during its accredited term. The land trust responded "not always" to the question, then it explained in a statement that it had one project completed without title investigation, why the title was not complete, that the land trust had since completed an investigation of title retroactively, and that it now has internal procedures that ensure title is investigated before closing for every project. By chance, that project had also been selected for review. The review team could see that the title investigation was completed retroactively and prior to the selection of the project. Since this had been disclosed in the application, there were no questions. The other projects were reviewed and all had contemporaneous title investigations that met the requirements. The land trust did not havd to provide any additional documentation.	A land trust did not investigate title for one project during its accredited term. It responded "always" to the question and did not include any additional information. By chance, that project had been selected for review, and the review team had noticed that the title investigation had not been completed and that there was no explanation or rationale. The other projects requested as part of the application all had contemporaneous title investigations that met the requirements. Because the land trust did not disclose or address the noncompliance, the review team had to request the following documentation from the land trust. a. Please provide documentation of title investigation for [MISSING projects]. b. If the organization did not obtain a title investigation for these projects at the time of acquisition, please complete the following: i. Review all transactions completed since accreditation was last awarded to determine how many fee properties and/or conservation easements were acquired without completing a title investigation at or before acquisition. ii. For all of the projects missing title investigations, complete a retroactive title investigation identifying the legal owner and mortgages, mineral leases or other elements specified in the practice 9H as shown above. iii. Provide the retroactive title investigations for [MISSING] projects. iv. Provide a list of the other projects that were missing documentation of title investigation, along with the date that title was completed. v. As part of the retroactive title investigation, if title issues are identified that might impair the ability of the organization to enforce a conservation easement or to protect the conservation values of a conservation easement or fee property, then also provide documentation that the organization examined the risk the title issues pose to the conservation values on the specific properties and that it determined whether any corrective action could or should be taken. vi. Provide a policy or procedure that documents how the organization will ensure compliance with the requirement in the future. **Your land trust can avoid this lengthy and complex additional information request by completing each question accurately and with full disclosure.**

Verification of Application Responses

To ensure the attestation and self-disclosure approach yields reliable results, we select the following items for verification in each round of applications. Note that this is in addition to any projects selected for complete review.

- Applicants who hold conservation easements will be required to submit easement monitoring reports and a baseline documentation report for a project(s) selected by the Commission for which there are at least five years of monitoring data available. *This information verifies data in the Land Conservation Project List (LCPL).*
- Applicants who hold conservation fee properties and that had no new conservation fee acquisitions during their accredited term will be required to submit an inspection report and a management plan for a project selected by the Commission that was completed prior to the previous accreditation. *This information verifies data in the LCPL.*
- Applicants who acquired one or more conservation easements/conservation fee properties during their accredited term will also be required to provide title investigation documentation for a project selected by the Commission. *This information verifies the response to application question 9H1.*

Early indications from the first two years of renewal show nearly 70% of applicants have one or more application responses that could not be verified in the application documentation. While these accredited land trusts have all since achieved renewal, the additional documentation required to address potential noncompliances takes an extraordinary amount of additional time for the *land trusts and commissioners, and raised serious questions about the reliance on an attestation and self-disclosure approach at renewal. This will continue to be monitored.*

Frequently Asked Questions

When do I find out what the Commission has selected for verification in my round?

Within five weeks of the application due date the requested verification items will be posted to the "Additional Documents" tab of the online renewal application. The applicant will have to submit the requested documentation as part of its application.

Who should complete the attestation on our land trust's behalf?

The person confirming the final "submittal certification" attestation must be someone familiar with the application and subject matter, who has authority to make the attestation on behalf of the organization, and who has reason to verify that it is true. The final attestation must include the name and title of the person making the attestation.

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
- 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

Applicants for renewal use an online application system to complete and submit an application. A complete application and all required attachments must be provided from each applicant to demonstrate that the land trust continues to meet all of the accreditation indicator practices and program requirements.

- Overview
- Before You Begin
- Completing the Application Questionnaire and Statements
- Project Documentation
- Templates and Sample Documents
- Video Tutorials

Overview

Your land trust is welcome to you may begin working on your online application as soon as it has registered for renewal. However, we require that the responses in your application be no older than 90 days prior to submission so plan to review your responses and uploaded attachments accordingly.

A land trust remains accredited during the renewal application review process, even if its accreditation expiration date has passed. Click here for information about penalties for failure to meet required due dates prior to the expiration of your organization’s accredited status.

Using the Online Application System

Details on how to use the online application system can be found in the User Manual and in these short video tutorials. Unless otherwise noted, all material submitted to the Commission at renewal must be submitted electronically using the online application system. Make sure to plan ahead to ensure that your land trust has all the information needed to ensure the application can be submitted electronically by the application due date.

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

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

TIP: Prior to submitting your application package, review any additional verification requests posted to the "Additional Documents" tab. This additional supporting documentation is required as part of your renewal application to verify compliance with practices 9H, 11B, 11C, 12C, and 12D (as applicable). Read more >>

Before You Begin

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

- **The User Manual (2MB) for the online system renewal application**, which includes information about using the online application system (located online at http://landtrust.civicore.com) to submit your renewal application materials. It also includes a reference copy of the registration, pre-application and application questions and documentation requests. *Note: these are provided for your reference only (all responses and supporting documentation are provided via the online application).*
- **The *Requirements Manual* (revised annually)**, which provides, all in one manual, information on the elements the Commission evaluates for every indicator practice and how to document that your land trust is meeting the requirements.

- **If applying with related entities:** also review the reference copies of the Addendum for Multiple Corporations – Basic and the Addendum for Multiple Corporations – Intermediate (as applicable; updated 9/20/12). Each applicable entity must submit the required information as part of the primary applicant's application in accordance with the Commission's policy.

Completing the Application Questionnaire and Statements

Application Questionnaire

The questionnaire for renewal of accreditation is part of the online system; questions and associated required attachments can be previewed in the User Manual. *Note: these are provided for your reference only (all responses and supporting documentation are provided via the online application).*

Application Statements

The application requires written statements as attachments, generally for detailed narrative responses. You may have written materials (such as policies, procedures, checklists, etc.) that answer the question; these may be included in support of your statement. If the written materials fully describe your response, you do not need to write a separate statement; simply identify the materials accordingly.

How Detailed an Answer?

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

Changed Practices

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

New Policies

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

Samples

For your convenience in writing any statements required for the renewal application, below are individual samples for your use:

- Sample statements for renewal application
- Templates for renewal application statements

Templates and Other Useful Documents

For your convenience in completing forms required for the renewal application, click here for individual templates for your use.

Review Process and Commission Decision

A review team of one or more commissioners and a Commission staff member reviews each complete renewal application in detail. The majority of the information evaluated by the review team will be provided by the accredited land trust; additional information may be provided by the public and still other information may be the result of research conducted by the Commission. 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
- Additional Information Request
- Commission Decision
- Frequently Asked Questions

Commission Research

The review team may conduct research regarding an accredited land trust. This research may include Web or print searches, documented interviews with individuals knowledgeable about the land trust's activities, informal visits to conservation properties and/or review of other data. The Commission is well aware that not all news accounts, websites or other reports are accurate or complete, thus affirmative disclosure and explanation 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 attestation thereof at renewal), but also looks for evidence that the policy and indicator practice are actually followed (such as by reviewing board meeting minutes from the last time the applicant managed a conflict of interest).

The review team may find the applicant is meeting each 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* Applicant Handbook*.*

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

Additional Information Request

If the review team needs additional information from an applicant or the applicant must take corrective action before a final decision is made on the application, the applicant will receive an additional information request (AIR) explaining the additional information/action needed. Applicants will generally be provided with up to three months to respond to the AIR. Download a sample AIR

If the accredited land trust would like clarification of the additional information request, it may request a conference call with the review team. The Commission will do its best to accommodate the request for a call in a timely manner; applicants should plan accordingly as it may take up to several weeks to arrange an acceptable date for the call. On limited occasions the review team may require the applicant to participate in a conference call, in such instances the call record may be part of the response to the additional information request.

- If applying with related entities, any additional information requests for the related entities will be included in the one Additional Information Request described above.
- At this time we will also request a copy of the Renewal Time Tracking Form. *This form is optional; it need only be provided if the land trust opted to track the time.*

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

Commission Decision

The Commission can make one of three decisions at the conclusion of the renewal process: not award renewal, conditionally renew, or award renewal. For more information about each of these, click here http://www.landtrustaccreditation.org/about/policies/312-policy-on-final-decisions-on-applications-for-first-time-and-renewal-of-accreditation.

Frequently Asked Questions

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

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

If you have questions about when your land trust should expect its additional info request please contact the Commission. We may be able to give you a specific timeline once review teams have been assigned.

Useful Documents

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

- The *Applicant Handbook*, which includes information on the renewal process;
- The User Manual (2MB) for the online system renewal application, which includes information about logging into the online application system (located online at http://landtrust.civicore.com), uploading and referencing documents, etc.;
- The *Requirements Manual*, 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; and
- The **reference edition** of the Application for Renewal of Accreditation (released June 2012; updated January 2015), which outlines all questions and describes each statement and attachment requested as part of the online renewal application system (see below).

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

- Land Conservation Project List (required as part of the pre-application),
- Renewal of Accreditation Agreement (required as part of the pre-application),
- Renewal of Accreditation Board Resolution (required for practice 1D documentation). The board of directors of the applicant organization must pass a Board Resolution endorsing the application and agreeing to the terms of accreditation. A template resolution is available for download for both first- time applications and applications for renewal. This step ensures that the entire board understands the commitment the organization is making to the accreditation program.
- Schedule of Dedicated and Restricted Funds (required for practice 6B documentation),

- 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; click here for instructions on how to complete the checklist, and the User Manual for instructions on where and when to upload the checklist and supporting documentation).
- Renewal 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, also review the reference copies of the Addendum for Multiple Corporations – Basic and the Addendum for Multiple Corporations – Intermediate (as applicable; updated 9/20/12).

Accreditation Fees

Accreditation fees are structured to provide land trusts of all sizes the opportunity to participate in accreditation and to support a program that builds strong land trusts, fosters public trust in land conservation and helps ensure the permanence of land conservation. The accreditation fee consists of a registration fee and an application fee.

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

Accreditation Fee Schedule for First-Time Accreditation and Renewal

- Click here

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*

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.

Appendix 1: 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/. Simply upgrading to Adobe 7 or another version will not allow the form to work properly; you must download and install version 9.1 or later.

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 at: http://www.landtrustaccreditation.org/the-process/application. 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.) You may also select the "Open" option and then save it to your computer by clicking on File→Save As once it is opened (this option works best in Internet Explorer). It may take a minute or two to download and save.

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 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.

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