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In Depth: Pre-Application for Land Trust Accreditation

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www.landtrustaccreditation.org

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

Webinar Outline

- Registration and Eligibility (briefly)
- Pre-Application Questionnaire and Required Attachments
- Submitting A Pre-Application
- Pre-Application Review and Project Selection
- Notification of Acceptance
- Public Notice Begins
- Additional Resources

Registration

- Register at www.landtrustaccreditation.org
- Registration is now open for 2010 and 2011
- Complete form and pay registration fee
Registration fee is nontransferable and nonrefundable

Registration

Confirm Eligibility (All Required)

- Land conservation mission, 2 years / 2 projects
- Adopted *Land Trust Standards and Practices*
- 501(c)(3) or quasi-governmental
- Adopted all required policies/procedures

“Welcome Letter” Flags Potential Issues

- Assessment within last 3 years
- Conservation easement defense funding (per Alliance guidelines)
- Related entities
- Small number of projects
- New and/or old policies

Pre-Application

- Revised December 2009
- Also used as screening tool, flag new issues or resolve previously identified issues
- Used to select projects
- Related entities might need separate pre-applications



Pre-Application

Two Sections:

- Pre-Application Questionnaire
 - Attachments
- 

Pre-Application Questionnaire

A few pointers:

Question 1: Organization Name and Contact Information

1. Selection of accreditation primary contact important!
 - Must be available
 - Must be comfortable with e-mail, e-mail attachments, and computers in general
2. Include street address in addition to P.O. Box, if applicable

Pre-Application Questionnaire

Question 3. Related Organizations

If your organization has more than one corporation, governing authority or related entity that is legally linked to it:

- Disclose at time of registration
- Contact the Commission to discuss
- Describe it in the Pre-Application Questionnaire as requested

Pre-Application Questionnaire

Question 4: Protected Land

Number and acres of easements and fee properties:

- currently held by your organization
- transferred to another organization or agency
- **additional land conservation activities**

Note:

- The numbers for your current holdings must match your land conservation project list

Pre-Application Questionnaire

Question 8. Financial Overview

“Provide your organization’s operating budget for its current fiscal year.”

- A single dollar amount that represents annual operating expenses
- Reflects overall organizational budget



Required Attachments



Required Attachments

PreApp1

Most recent Form 990 (or Form 990-EZ) as filed with IRS. Include

- Form 990T, *if applicable*
- All completed Schedules
- All Completed Statements
- All Attachments

Required Attachments

PreApp2

Board Resolution adopting the 2004 version of
Land Trust Standards and Practices

- Now requested as part of pre-application
- No longer required in full application

Required Attachments

PreApp3

Evidence of completed assessment against full set of *Land Trust Standards and Practices*

- See pages 8-9 of the *Applicant Handbook*
- Must not be older than 3 years from the pre-application due date
- Note whether and how board of directors was involved
- No longer required in full application

Required Attachments

PreApp3

- Completed *AYO* summary pages 18 and 37
 - Board retreat agenda and notes
 - Meeting minutes showing discussion of results
-

Note: If your organization did not use AYO, provide:

- a copy of the completed assessment tool
- a cover page to the assessment results that identifies how the assessment addressed each of the practices in *Land Trust Standards and Practices*.

Required Attachments

PreApp4

Completing the Land Conservation Project List

- Use the Commission Excel template (preferred)
- One list for easements, one for fee
- List each easement separately
- May list fee properties by preserve or project

Required Attachments

PreApp4

Land Conservation Project List

- Double check data. **Make sure it is accurate!**
- List of projects must be no older than 3 months prior to the pre-application due date
- Number of projects must correspond to data in question 4 of the Pre-Application Questionnaire

PreApp4

Land Conservation Project List (*continued*)

- **Fee property list** must include all fee properties *with notes as applicable regarding conservation status*
- **Conservation easement list** should include co-held easements *with notes as applicable.*
- *Do not list life estates that have not been transferred, easements for which you are third-party beneficiary, or transferred/sold projects.*

Required Attachments

PreApp4

Land Conservation Project List *(continued)*

Data used to confirm pre-application requirements:

- Fee management plans. *Each fee must have management plan or summary.*
- Fee inspection dates. *Each fee must have at least one inspection date.*

Required Attachments

PreApp4

Land Conservation Project List (*continued*)

Data used to confirm pre-application requirements:


- Easement baseline documentation reports. *All completed.*
- Annual monitoring. *Each easement must have*
 - *36-month history of annual monitoring or, if recent practice,*
 - *2 visits roughly 12 mos. apart within past 24 months*


Required Attachments

PreApp5

Schedule of Dedicated and Restricted Funds

- Use the Commission Excel template (**required**)
- Select close of most recent month or quarter as reporting date for all funds
- List each fund separately
- Use Template to identify fund restriction(s)

 Security Warning Macros have been disabled. Options...

D4 

	A	B	C	D
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Schedule of Dedicated and Restricted Funds

See the "Instructions for the 2010 Pre-Application for Land Trust Accreditation" for complete instructions.

Organization Name: *Green Acres Land Trust*

Reporting Date of Data: *03/31/10*

FUND NAME AND CATEGORY	FUND PURPOSE	DOLLARS	
		UR/no	BD

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Operating Reserve or Endowment			
---------------------------------------	--	--	--

<i>Enter name of fund here</i>	Description:		\$0
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	Use(s) of Principal:		
--	----------------------	--	--

	Use(s) of Interest/Dividends:		
--	-------------------------------	--	--

<i>Enter name of fund here</i>	Description:		\$0
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	Use(s) of Principal:		
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	Use(s) of Interest/Dividends:		
--	-------------------------------	--	--

<i>Enter name of fund here</i>	Description:		\$0
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	Use(s) of Principal:		
--	----------------------	--	--

	Use(s) of Interest/Dividends:		
--	-------------------------------	--	--

Conservation Easement Stewardship*			
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<i>Enter name of fund here</i>	Description:		\$0
--------------------------------	--------------	--	-----

	Use(s) of Principal:		
--	----------------------	--	--

	Use(s) of Interest/Dividends:		
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	A	B	C	D	E	F	G	H
7	CATEGORY			UR/no BD	UR/BD	TR	PR	TOTAL
8	Operating Reserve or Endowment							
18	Conservation Easement Stewardship*							
19	<i>Stewardship Endowment</i>	Description:	to manage/defend easements in perpetuity	\$23,000	\$97,000	\$0	\$15,000	\$135,000
20		Use(s) of Principal:	monitoring and stewardship of easements					
21		Use(s) of Interest/Dividends:	defense of easements					
22	<i>Enter name of fund here</i>	Description:		\$0	\$0	\$0	\$0	\$0
23		Use(s) of Principal:						
24		Use(s) of Interest/Dividends:						
25	Conservation Easement Defense*							
26	<i>Enter name of fund here</i>	Description:		\$0	\$0	\$0	\$0	\$0
27		Use(s) of Principal:						
28		Use(s) of Interest/Dividends:						
29	<i>Enter name of fund here</i>	Description:		\$0	\$0	\$0	\$0	\$0
30		Use(s) of Principal:						
31		Use(s) of Interest/Dividends:						
32	Land Management*							
33	<i>Enter name of fund here</i>	Description:		\$0	\$0	\$0	\$0	\$0
34		Use(s) of Principal:						
35		Use(s) of Interest/Dividends:						
36	<i>Enter name of fund here</i>	Description:		\$0	\$0	\$0	\$0	\$0
37		Use(s) of Principal:						
38		Use(s) of Interest/Dividends:						
39	Other**							
40	<i>Enter name of fund here</i>	Description:		\$0	\$0	\$0	\$0	\$0
41		Use(s) of Principal:						

Required Attachments

PreApp6

Paper Map

- *Only attachment required as a hard-copy*
- Provides an overview of conservation work
- Show approx. location of fee lands and easements
- Should be relatively recent
- No smaller than 8 ½ x 11

Required Attachments

PreApp7

Signed Accreditation Agreement

- Now required as part of pre-application
- **No longer required in full application**

Required Attachments

PreApp8

Articles of Incorporation

- Copy of filed Articles
- If applicable, include any subsequent amendments
- **No longer required in full application**

Required Attachments

PreApp9

Certificate of Good Standing

- For state in which you reside
- Available through Secretary of State
- **No longer required in full application**

Required Attachments

PreApp10

IRS Tax-Exempt Letter

- Copy of final IRS letter granting tax exempt status
- **No longer required in full application**

Submitting A Pre-Application

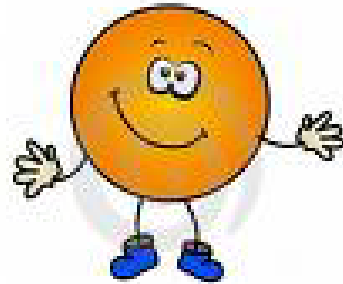
- Must be in Commission office on or before due date (*may be submitted up to one month in advance*)
- **Only one set of pre-application materials required**
- Must be sent together in one package

Submitting A Pre-Application

(continued)

- Map must be hard-copy
- **Land Conservation Project List** and **Schedule of Dedicated and Restricted Funds** must be an electronic copy in Excel
- Other required attachments may be hard copy, PDF, or Word documents, *as applicable*


Now What?





Pre-Application Review


The Commission will review each pre-application to determine:

- Is organization eligible?
 - Are documents provided complete?
 - Highlight any items that might be of issue in the application
- 




Project Selection

The Commission will also use the pre-application to select projects:

- 2-6 projects selected
 - Project documentation checklist
 - Newer projects, current practice
 - Older projects, stewardship focus
- 




Notification of Acceptance

- Within 5 weeks of application due date
 - Electronic notification
 - Includes list of projects selected
 - Includes identification of areas that need addressing in complete application
- 



Public Notice Begins

- Organization should begin notification of stakeholders, both internal and external
 - See pages 27-30 and pages 43-44 of the *Applicant Handbook* for complete details
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Additional Resources

Commission:

- Webinar on the application process
- *Applicant Handbook*
- Application Materials
- Fact sheets
- *Guidance Documents*

Additional Resources

Land Trust Alliance:

- The Learning Center: <http://learningcenter.lta.org>
- *Standards and Practices Guidebook*
- Standards and Practices Curriculum
- Training, conferences, online learning and webinars

Questions?



Thank you!



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