



FIRST-TIME ACCREDITATION INFORMATION SESSION

LAND TRUST 
ACCREDITATION
COMMISSION

Road Map

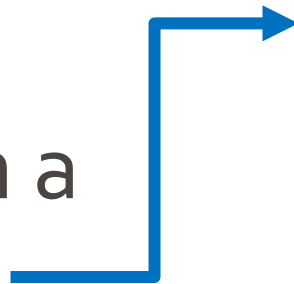
- “Forest View” of Accreditation
- First-Time Application Process
- Tools in your Toolbox
- Questions and Tips





Accredit...

"b: to recognize or vouch for as conforming with a standard"

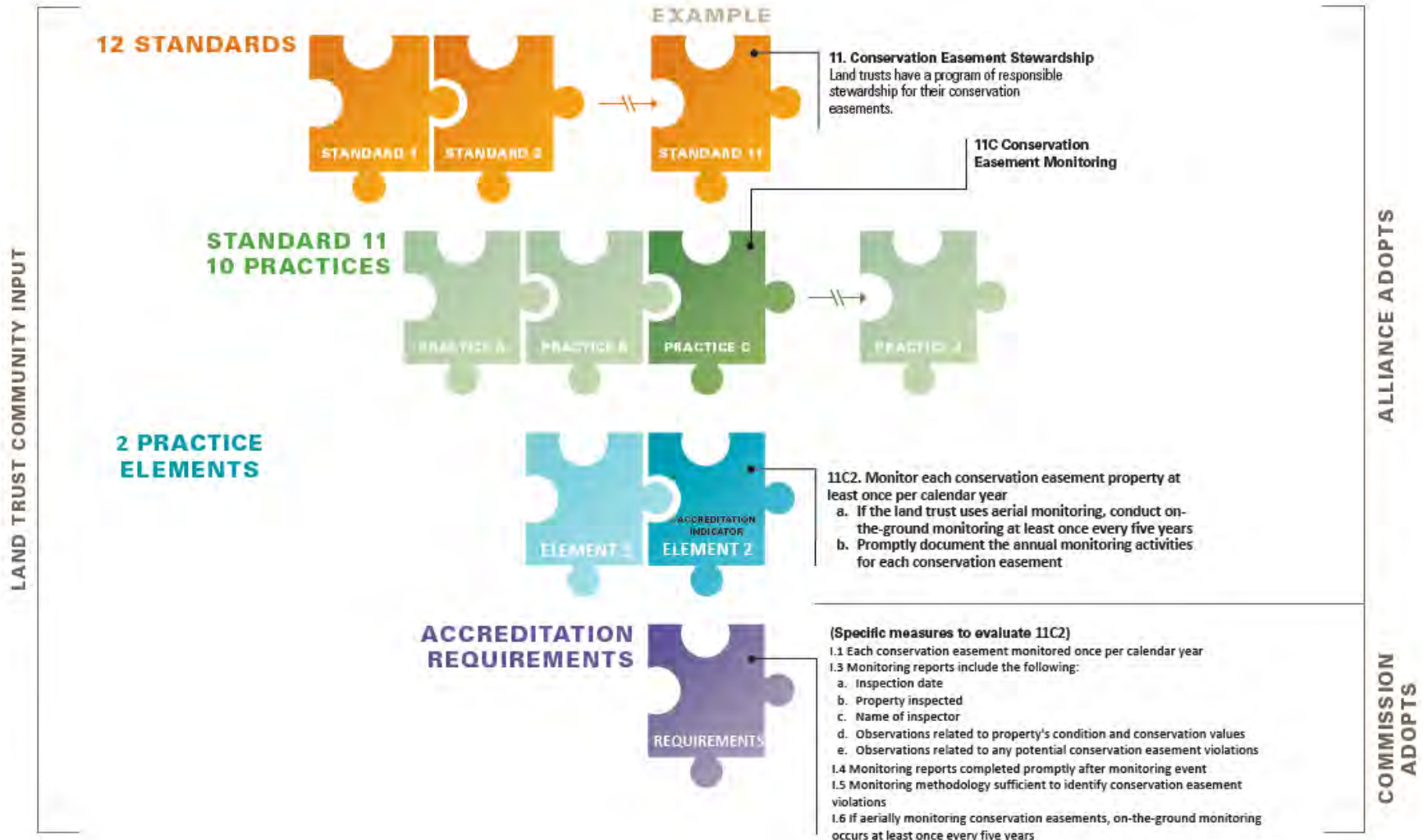


2017 Standards



Land Trust Standards and Accreditation Requirements

Your guide to how standards, practices, elements, and accreditation indicators (adopted by the Alliance) and accreditation requirements (adopted by the Commission) fit together and build strong land trusts.



Stewardship

Indicator Elements

11B3. When there are significant changes to the land or the conservation easement (such as a result of an amendment or the exercise of a permitted right), document those changes in an appropriate manner, such as through monitoring reports, a baseline supplement or current conditions report

11C2. Monitor each conservation easement property at least once per calendar year; (a) If the land trust uses aerial monitoring, conduct on-the-ground monitoring at least once every five years, (b) Promptly document the annual monitoring activities for each conservation easement

11E2. Investigate potential violations in a timely manner and promptly document all actions taken

11F3. Maintain a permanent record of all notices, approvals, denials, interpretations, and the exercise of any significant permitted rights

11H1. Adopt and follow a written procedure addressing conservation easement amendments that is consistent with the Land Trust Amendment Principles

easement deed, (b) Ensure there is no private inurement or impermissible private benefit, (c) Take steps to avoid or mitigate harm to conservation values and/or use any proceeds in a manner consistent with the conservation easement deed, (d) Consider the land trust's actions in the context of its reputation and the impact on the land conservation community at large

12B1. Develop a written land management plan for each conservation property within 12 months after acquiring the land to: (a) Identify the property's conservation values, including significant cultural and natural resources or those that have significant community value, (b) Identify the overall management goals for the property, (c) Identify actions to achieve the goals and to address risks or threats to the conservation values, (d) Specify the values appropriate for the property with the property's conservation values, any restrictions or funder requirements

12C2. Inspect properties at least once per calendar year for potential management problems and document the inspection findings

12C3. Address management problems identified during inspections

Requirements

I. Conservation Easement Monitoring and Conservation Property Inspections ^{11C2, 12C2}

1. **Each conservation easement monitored once per calendar year.** (Monitoring shown over accredited term at renewal; shown over last three years at first-time.)
2. **Each conservation property inspected once per calendar year.** (Inspections shown over accredited term at renewal; shown over last three years at first-time. ^{Starting in 2021 for first-time})
3. **Monitoring or inspection reports include the following:** ^{Started in 2020 for fee inspection reports}
 - a. **Inspection date**
 - b. **Property inspected**
 - c. **Name of inspector**
 - d. **Observations related to property's condition and conservation values**
 - e. **Observations related to any potential conservation easement violations or conservation property ownership challenges**
 - f. **Date report completed** ^{Starting in 2022}
4. Monitoring or inspection reports completed generally within three months of the monitoring or inspection date.
5. Monitoring or inspection methodology sufficient to identify conservation easement violations or conservation property ownership challenges.
6. If aerially monitoring conservation easements, on-the-ground monitoring occurs at least once every five years.

Registration	Pre-Application	Main Accreditation Application		
		Questions & Documents	Project Documents: Conservation Easements & Conservation Fee Properties	Targeted Verification Documents

A Mark of Distinction

The accreditation seal **AFFIRMS** national quality standards are met.



- ☒ SOUND FINANCES
- ☒ ETHICAL CONDUCT
- ☒ RESPONSIBLE GOVERNANCE
- ☒ LASTING STEWARDSHIP

www.landtrustaccreditation.org

Accreditation = Strength

ACCREDITATION & STRENGTH

100%

Accredited land
trust average
increase in

ACRES CONSERVED

2005–2015



87%

of accredited land trusts said accreditation
motivated them to make
ORGANIZATIONAL
IMPROVEMENTS



107%

Accredited land trust
average increase in

OPERATING
BUDGET

2005–2015



160%

Accredited land trust
average increase in

NUMBER OF
VOLUNTEERS

2005–2015



Accreditation = Public Trust

ACCREDITATION & TRUST

79%

of foundation and government stakeholders said **accreditation** factored into their organization's **DECISION-MAKING**



83%

of landowners said **accreditation** increased their confidence that their land would be

PROTECTED IN PERPETUITY



85%

of public agencies and foundations said **accreditation** increases their

CONFIDENCE IN LAND TRUSTS



80%

of landowners said they **considered** **accreditation** when deciding to

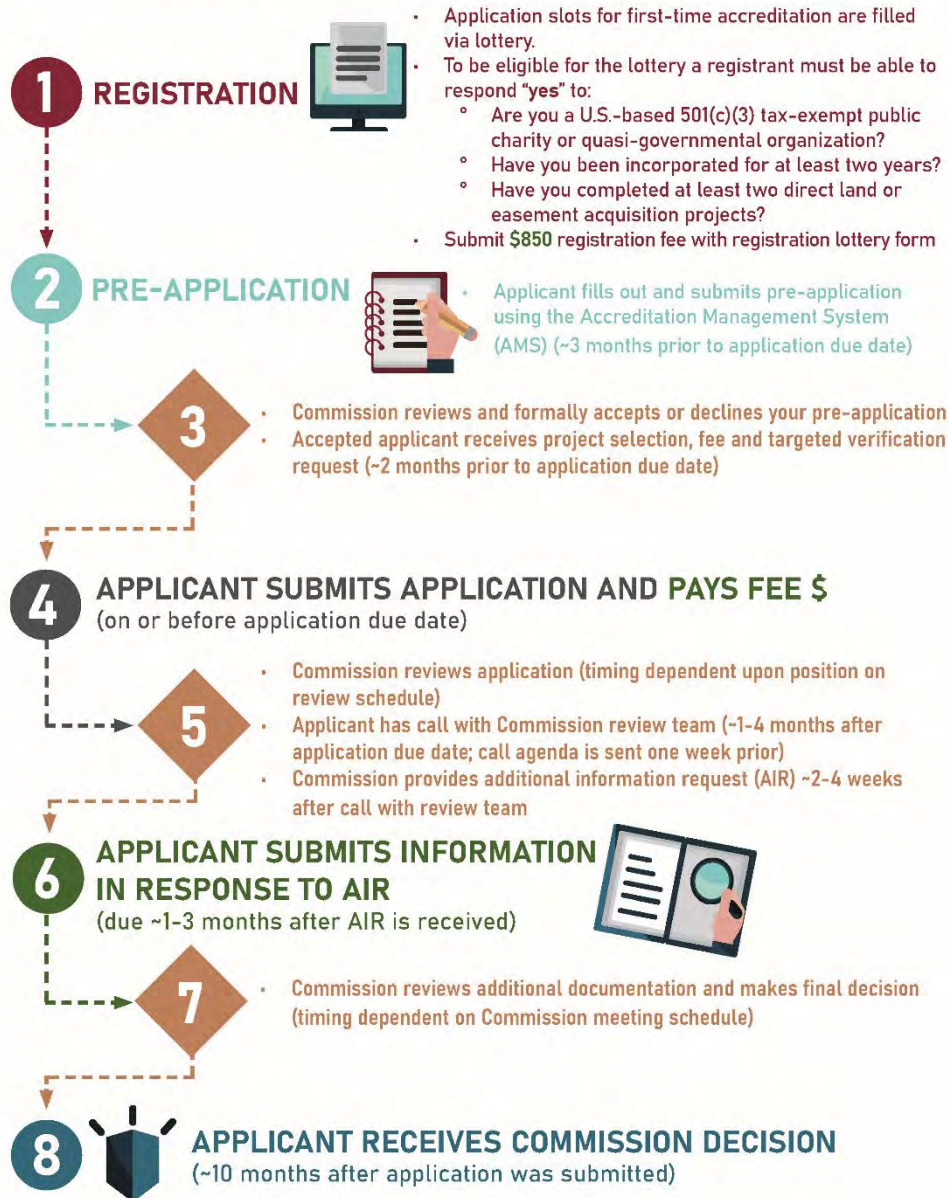
WORK WITH A LAND TRUST





What can we expect
during the application
process?

First-Time Accreditation Process



1

REGISTRATION



- Application slots for first-time accreditation are filled via lottery.
- To be eligible for the lottery a registrant must be able to respond “yes” to:
 - Are you a U.S.-based 501(c)(3) tax-exempt public charity or quasi-governmental organization?
 - Have you been incorporated for at least two years?
 - Have you completed at least two direct land or easement acquisition projects?
- Submit **\$850** registration fee with registration lottery form

Registration Period:

June 30 – August 11, 2022

Notification:

Early September 2022

Interested in Future Years? Submit a Notice of Intent

2 PRE-APPLICATION



- Applicant fills out and submits pre-application using the Accreditation Management System (AMS) (~3 months prior to application due date)

3

- Commission reviews and formally accepts or declines your pre-application
- Accepted applicant receives project selection, fee and targeted verification request (~2 months prior to application due date)

What do we submit at this step?

- Accreditation Agreement
- Land Conservation Project List
- Schedule of Dedicated and Restricted Funds
- Legal Defense Reserves Calculator
- Descriptions of specified activities (verification statements)

Pre-Application Due:	February 28, 2023
Pre-Application Review:	March
Notification:	April 2023

What are the special forms we have to complete?

Land Conservation Project List

CONSERVATION EASEMENTS PROJECT LIST COMPLETE THIS WORKSHEET ONLY IF APPLYING FOR FIRST-TIME ACCREDITATION <i>Renewal applicants, please select the Renewal CEList tab</i> <i>(see separate tab for complete instructions, including a description of the contents of each column)</i>													
ORGANIZATION NAME:													
DATE COMPLETED:													
Conservation Easement Land Conservation Project List													
A	B	C	D	E	F	G	H			I	J	K	L
Date Acquired (Recorded)	Project Name	Grantor	Town, City, or County	Acres	Type (D/B/P/M/O/C)	Baseline Report Date Completed (Signed)	Monitoring Dates (mm/yy)			Form 8283 (check if in last 5 years)	Complete if Form 8283		Notes (also, if "O" or "C" selected in Column F, please describe)
							most recent year completed	year prior	two years prior		Enter "yes" for transactions since 2016 if: transaction was a) with a pass-through entity of unrelated parties with an appraised value of more than 2.5 times the basis in the property within 36 months of the entity's acquisition and b) the value of the donation was greater than \$1 million.	If yes to column "J," enter appraised FMV	

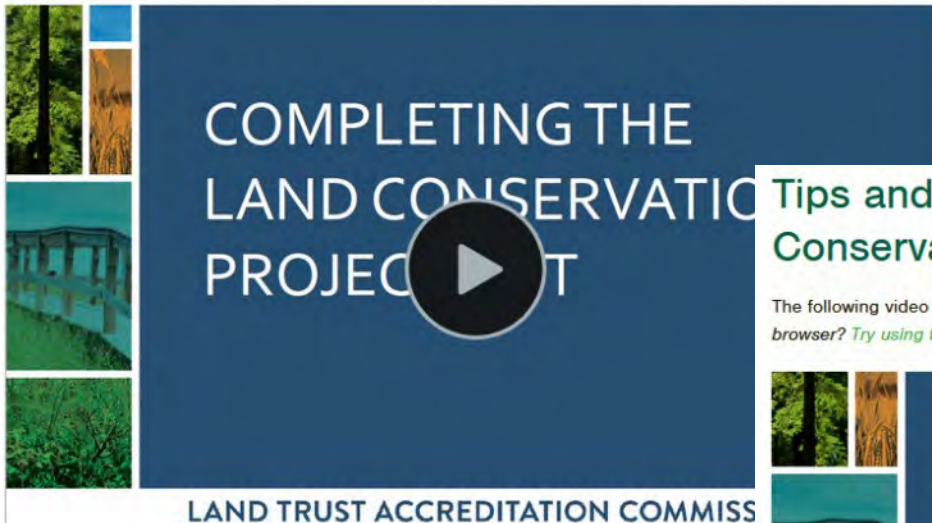


- Start it early
- Use it (or a similar database) to keep record of your portfolio

Video Tutorials

Completing the Land Conservation Project List

The following video tutorial demonstrates how to complete the Land Conservation Project List. *Having trouble viewing in your browser? Try using the direct link.*



Tips and Techniques for Completing the Land Conservation Project List

The following video tutorial offers tips and techniques for completing the Land Conservation Project List. *Having trouble viewing in your browser? Try using the direct link.*



Schedule of Dedicated and Restricted Funds

Schedule of Dedicated and Restricted Funds

Please see the instructions tab for a description of the contents of each column.

Organization Name:	Name						
Date and Source of Data:	MM/DD/YY Document Name						
FUND NAME AND CATEGORY	FUND DESCRIPTION	DOLLAR VALUE AND TYPE(S) OF RESTRICTIONS					NOTES
		WITHOUT DONOR RESTRICTIONS		WITH DONOR RESTRICTIONS			
		Undesignated	Board-designated	Restricted by Time or Purpose	Perpetual	TOTAL	
Operating Reserves							
Enter name of fund here		\$0	\$0	\$0	\$0	\$0	
Conservation Easement Stewardship							
Enter name of fund here		\$0	\$0	\$0	\$0	\$0	
Conservation Easement Defense							
Enter name of fund here		\$0	\$0	\$0	\$0	\$0	
Fee Land Management							
Enter name of fund here		\$0	\$0	\$0	\$0	\$0	
Fee Land Defense							
Enter name of fund here		\$0	\$0	\$0	\$0	\$0	
TOTAL		\$0	\$0	\$0	\$0	\$0	

Video Tutorials



What are verification statements and how much detail do we need to provide?

FIRST-TIME ACCREDITATION

HOME › FIRST-TIME ACCREDITATION › PRE-APPLICATION AND ATTACHMENTS

Pre-Application and Attachments



Login to t
Manageme

Helpful
Tips



[Click for Tips about Mergers & Affiliations](#)



[Click for Tips on Verification Statements](#)



Here are examples of how you might respond to the verification statements, using amendments as the category: [Narrative style response](#) | [Chart style response](#)

Why might our pre-application not be accepted?

Eligibility requirements

- Not primarily engaged in the active acquisition or stewardship of conservation land or conservation easements
- Pre-application documents are in unacceptable condition/not complete
- Not a publicly supported charity

Pre-application requirements

- Baseline Documentation Reports
- Management Plans
- Annual Conservation Easement Monitoring
- Annual Conservation Fee Property Inspections

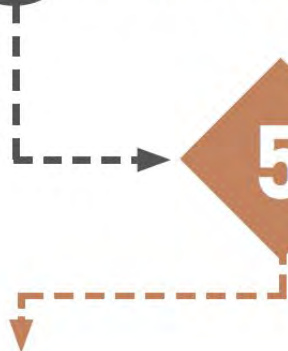




Your Questions...



4 APPLICANT SUBMITS APPLICATION AND PAYS FEE \$ (on or before application due date)



- Commission reviews application (timing dependent upon position on review schedule)
- Applicant has call with Commission review team (~1-4 months after application due date; call agenda is sent one week prior)
- Commission provides additional information request (AIR) ~2-4 weeks after call with review team

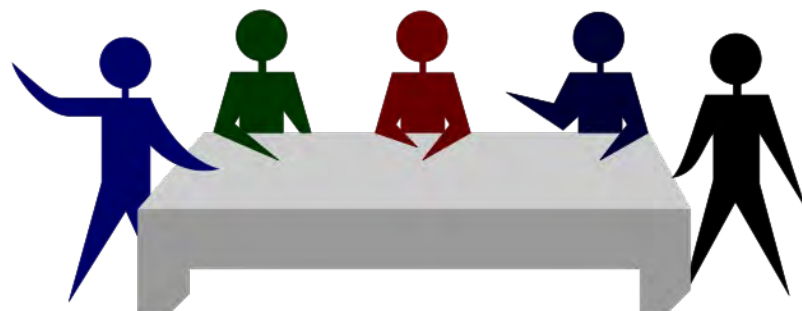
Main Accreditation Application		
Questions & Documents	Project Documents: Conservation Easements & Conservation Fee Properties	Targeted Verification Documents

Example Timeline

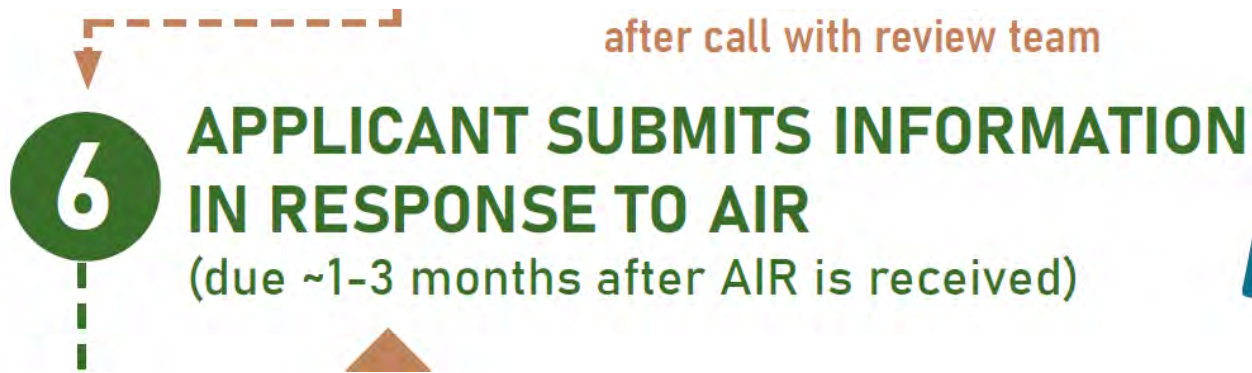
Application Due: June 6, 2023
Review: June – July (approx.)
Call: July – August (approx.)
Add'tl Info Request: August – Sept. (approx.)

What happens during the applicant call?

- Conference call with reviewers assigned to your application
- Scheduled early in process
- Agenda one week in advance with call-in information
- Board and staff should attend
- No need to provide advance materials
- Review team identifies need for any additional information



When will we have an opportunity to provide additional information?



Additional Info Request Due:

October – December (approx.)

When will we find out the Commission's decision?



Commission Decision:

February 2024

Commission Decision

- Considers recommendation
- Makes a final decision
 - Accredited
 - Accredited with Expectations for Improvement
 - Table Decision (first-time) for additional information/action (*for maximum of 12 months*)
 - Not Award Accreditation (*with road map for how to be successful in a future application*)



Assigned Staff

section. Red categories have not been started, yellow categories have been started but are not yet complete, and green categories are complete.

Application Overview
The application section is 100% complete

Don't forget to complete the applications for your Related Entities
Based on your pre-application, your land trust is applying with related entities.
You are required to complete an application for each entity you added to your pre-application.

[Click here to view the list of applications for your land trust](#)

[Print Application Section](#)

General
Questionnaire
Attachments

Governance
Questionnaire
Attachments

Finance
Questionnaire
Attachments

If yes, describe
100% turnover

7. Does your land trust need to correct the Land Conservation Project List it submitted in its renewal pre-application?
No

8. Is your land trust a member of the Land Trust Alliance?
Yes

9. Does your land trust have any significant changes (or corrections) to make to its Schedule of Dedicated and Restricted Funds, to demonstrate more clearly how your land trust meets stewardship and defense funding requirements?
No

[Continue to Next Section](#) [Return to Application Overview](#) [Return to Renewal Overview](#)

[Ask a Question about the Application](#)

[Ask a Question about the Application](#)

General - Attachments

Click on a category listed below to begin working in that section.
Red categories have not been started, yellow categories have been started but are not yet complete, and green categories are complete.

General
Questionnaire
Attachments

Governance

Showing 1 record(s).

Trigger Field	Number	Description
Required Attachment	1	Documentation of stakeholder notification of public comment period

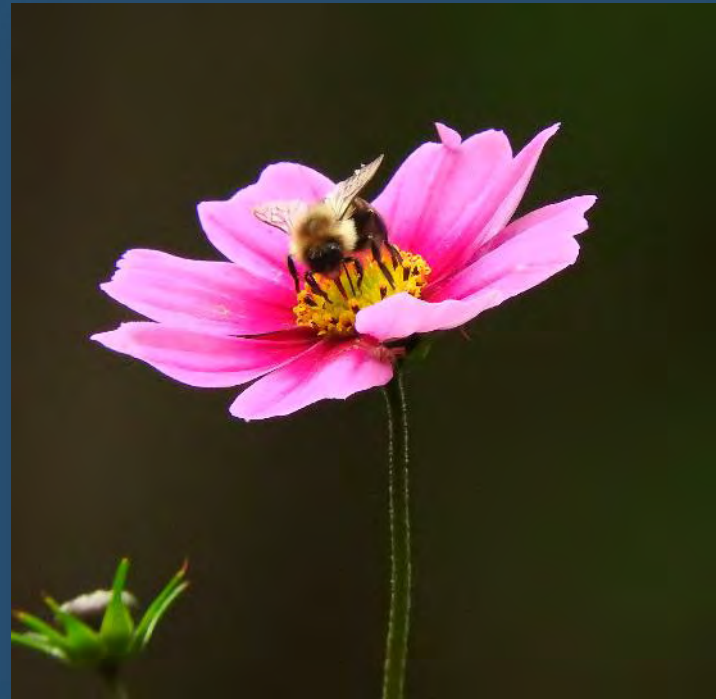
[Show Uploaded Documents](#)

[Continue to the Next Section](#) [Return to Application Overview](#) [Return to Renewal Overview](#)

[Ask a Question about the Application](#)



Your
Questions...

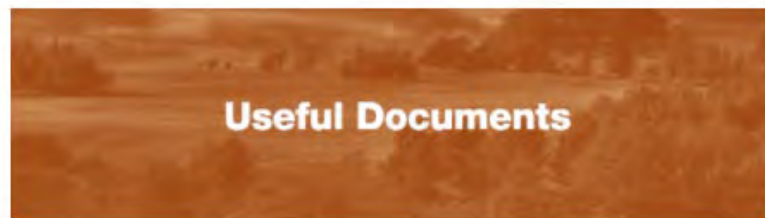




Tools in your Toolbox



What's the best place to get information?



How do I use the resources?



GLOSSARY & CLARIFICATION OF APPLICATION TERMS	
AMS:	Accreditation Management System; online application and communication system between the Commission and applicants.
Conservation fee properties:	Land held in fee for conservation purposes at the time of the application. If land is acquired because of its conservation value, even if held for transfer or sale with a conservation easement, it should be listed on the Land Conservation Project List and is subject to the applicable accreditation requirements.
Impermissible private benefit:	Occurs when a tax-exempt organization provides more than an "incidental" benefit to a non-insider.
Insider:	Board members; staff (if any); substantial contributors; parties related to board members, staff, and substantial contributors; those who have an ability to influence the decisions of the land trust; and those with access to information not available to the general public.
Internal controls:	Internal controls are a system of checks and balances designed to safeguard the assets of the organization and to help ensure that resources are directed to appropriate and authorized purposes.
Management letter:	Correspondence from a certified public accountant (CPA) to the land trust board that presents any concerns about the reliability of the fiscal systems and accounting data that were identified as part of the audit, review, or compilation.
Operating expenses:	Unrestricted expenses excluding the costs of purchasing land or conservation easements.

Reference Copies:

<http://www.landtrustaccreditation.org/first-time-accreditation/useful-documents>

How do I know what the Commission is looking for?



Accreditation Requirements Manual

March 2021




Online Application and System



Tip: If you see a , click on it for more information.

Governance - Questionnaire

Click on a category listed below to begin working in that section. Red categories have not been started, yellow categories have been started but are not yet complete, and green categories are complete.

 Requirements

Updated 07/01/2019 by Libby Patch

General

-  Questionnaire
-  Attachments

Governance

-  Questionnaire
-  Attachments

Finance

-  Questionnaire
-  Attachments

Transactions

-  Questionnaire
-  Attachments

Governance

1. Number of board meetings in the last 12 months with quorum.
5
2. Does your organization employ staff?
No
3. Is your land trust in “good standing” in the state it was incorporated?
No
4. Describe the procedures for a) recruiting board members and b) training new board members.
5
5. Describe how the board established the strategic goals or strategic plan.
5
- 5a. Date the board last reviewed strategic goals or strategic plan
07/09/2019
6. Did your land trust have an isolated or rare instance when it was not able to show compliance with the [requirements in the Governance section](#) in its recent work?
No

[Continue to Next Section](#)

[Return to Application Overview](#)

[Return to First-Time Overview](#)

What kind of help is available?

HELP & RESOURCES

HOME › HELP & RESOURCES › ONLINE TRAINING OPPORTUNITIES › VIDEO TUTORIALS - FIRST-TIME

Video Tutorials - First-Time


We are pleased to provide the following video tutorials for first-time applicants. New tutorials v

- 1 [First-Time Overview Video](#)
- 2 [Completing the Schedule of Dedicated and Restricted Funds](#)
- 3 [FAQ Schedule of Dedicated and Restricted Funds \(SDRF\)](#)
- 4 [Completing the Land Conservation Project List](#)
- 5 [Tips and Techniques for Completing the Land Conservation Project List](#)
- 6 [Legal Defense Reserves Calculator](#)

First-Time Overview Video



Watch a video that outlines the first-time accreditation process. And take a [look at our other video tutorials](#) to help you understand the application process and on using the accreditation management system.




Introduction to Accreditation and the Requirements Manual

★★★★★ (0)

In this module, you will learn how Land Trust Standards and Practices are linked to accreditation and how to use the Accreditation Requirements Manual, which is your guide to successfully earning and maintaining accreditation.

Accreditation Accreditation Indicator




Introduction to Accreditation and the Requirements Manual

★★★★★ (0)

This module explores the accreditation requirements and how to use the Accreditation Requirements Manual, which is your guide to successfully earning and maintaining accreditation.

Accreditation Transactions Standard




Introduction to Accreditation and the Requirements Manual

★★★★★ (0)

This module explores the accreditation requirements and how to use the Accreditation Requirements Manual, which is your guide to successfully earning and maintaining accreditation.

Accreditation Governance Standard 03: Board Accountability Accreditation




Introduction to Finance Requirements

★★★★★ (0)

This module explores the accreditation requirements and how to use the Accreditation Requirements Manual, which is your guide to successfully earning and maintaining accreditation.

Accreditation Finance Standard 06: Financial Oversight Accreditation



Introduction to Stewardship Requirements

★★★★★ (0)


This module explores the accreditation requirements and how to use the Accreditation Requirements Manual, which is your guide to successfully earning and maintaining accreditation.

Accreditation Stewardship Standard 11: Conservation Easement Stewardship

Discussion Forums

My Forums
Browse Forums

16 Forums



Stewardship


This community is a place for stewardship volunteers and staff from around the world to ask questions, discuss concepts, and obtain feedback about conservation easement stewardship issues. Stewardship personnel from every region of the country can check this site regularly and will help facilitate the sharing of resources.

Last post 13 hours ago

My Learning


Current
Completed
Submissions

11 Learning Items



Learn Practice Element 11E1: Adopt a Conservation Easement Violation Policy and Procedures

Not Started



Learn Practice Element 11B3: Documenting Changes to Land or Easements

0%

LAND TRUST
Standards and Practices

STANDARD 11. CONSERVATION EASEMENT STEWARDSHIP

C. Conservation Easement Monitoring

- 2. Monitor each conservation easement property at least once per calendar year
 - a. If the land trust uses aerial monitoring, conduct on-the-ground monitoring at least once every five years
 - b. Promptly document the annual monitoring activities for each conservation easement

Accreditation indicator elements located at www.landtrustaccreditation.org

BACKGROUND

A land trust should monitor its easements at least once per calendar year. Monitoring helps a land trust develop a relationship with the landowner, helps discover changes in land ownership, enables it to see if the easement is effective, helps uncover violations, saves time and money on enforcement actions, and establishes a record in case of court action. Annual monitoring routinely involves annual landowner contact. With changes in the property's condition, such as changes in the property's condition (for example, a drive-by inspection), a violation could be documented to build a record. The land trust should conduct a monitoring visit. Critical elements of the property inspected, who did the inspection, and the conservation values and elements with particularly sensitive areas may require monitoring.

Conservation Easement Monitoring
Last revised November 16, 2018

Governance

[Learn more about this group](#)

← [LINK TO ONLINE COURSE](#)

Indicator Elements - [Compiled Guidance for Governance Indicator Elements](#)

← [LINK TO NARRATIVES
COMPILED FOR THIS GROUP](#)

- 1B2.** Establish strategic goals for implementing the mission, and then review and update them, as needed, at least once every five years
- 2B1.** Incorporate or organize according to the requirements of state law and maintain legal status

- 3C2.** The board meets a minimum of three times per year and maintains adopted minutes of each meeting
- 3C3.** Provide board members with sufficient and timely informational materials prior to each meeting to make informed decisions

← [LINKS TO INFORMATION ABOUT
SPECIFIC INDICATOR ELEMENTS](#)



Tip: Log into The Learning Center [before](#) clicking on the links.



And even more questions!



What are common problems that stop accreditation from being awarded?

- Recordkeeping
 - Originals secure
 - Duplicate copies of irreplaceable records stored in separate location from originals
- Annual Financial Evaluation
 - Audit, review, or compilation based on total support/revenue
- Review and approval of most recent land transaction
 - Minutes from the meeting where project approved
- Project completed after pre-application submitted must meet requirements





What are common mistakes made in meeting requirements?

- Policies missing required contents
- Bargain sale gift acknowledgement letters missing the value of the payment
- Financial reports to board missing contents
- Fee inspection reports missing contents

Use the *Requirements Manual* to Pre-Screen

3. **Monitoring or inspection reports include the following:** Started in 2020 for fee inspection reports
- a. **Inspection date**
 - b. **Property inspected**
 - c. **Name of inspector**
 - d. **Observations related to property's condition and conservation values**
 - e. **Observations related to any potential conservation easement violations or conservation property ownership challenges**
 - f. **Date report completed** Starting in 2022



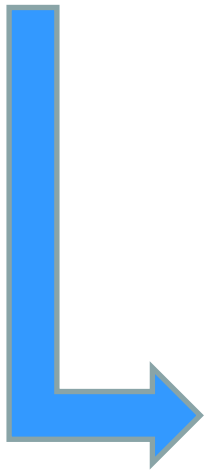
What if we didn't quite meet a requirement?

7. Did your land trust have an instance when it was not able to show compliance with the requirements in the Transaction section over the accredited term?

Yes



Governance
Finance
Stewardship



If your land trust has an instance when it was not able to show compliance with the requirements in the Transactions section over the accredited term: Statement and/or related documentation explaining a) the circumstances, b) the alternative steps your land trust took to meet the intent of the requirement and/or mitigate risks associated with the non-compliance and c) how your land trust typically complies with the requirement (The Commission will review the information to determine if the instance was isolated and rare and risks were reasonably mitigated.)

What are the best tips to reduce documentation problems?

- Missing documentation: can we show that we have met this requirement ?
- Incomplete or vague responses: Would someone unfamiliar with our land trust understand what we are saying?
- Uploaded incomplete or wrong document: Have we uploaded the most recent [policy] and complete and final copies (all attachments)?



More tips

- Look for the “and:” Did we check to make sure we provided all requested information?
 - Solicitation AND gift acknowledgement letter
 - Meeting materials AND date materials sent AND meeting minutes
- Do we have the right documentation?
 - *For example, document review of insurance needs*



1. Board or delegated entity evaluates? Insurance needs at least every five years to determine risk exposure and needs for at least the following:
 - a. **Directors and officers liability insurance**
 - b. **Property insurance**
 - c. **Insurance required by law** (Such as workers' compensation insurance.)

(Example evaluation documentation includes board or committee meeting minutes, analysis of insurance needs by delegated staff member, recommendations from insurance provider given to the board, report presented to the board or delegated committee)



What Now?

- Understand *Standards and Practices* and accreditation requirements
- Evaluate your readiness: Assessing Your Organization
- Contact Alliance field staff about help and resources
- Learn the process steps
- Create a committee to guide the process
- Look at the reference version of the application

Final Tip:

You are
not in this
alone



Alliance Field Staff

Our Regional Programs

Address challenges in your part of the country, with support from the land trust community.

- Mid-Atlantic
- Midwest
- New England
- New York
- Southeast
- West



How to reach us

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Final Questions
