First-Time Applicant Handbook

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

As of December 2017
This First-Time Applicant Handbook compiles essential process information from the website in one location for your convenience. The full information for applicants, including Commission policies and other documents, is on our website.

If you have questions, email info@landtrustaccreditation.org or call 518-587-3143.
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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 almost 80% of all land under conservation easement or owned in fee by land trusts, ensuring the promise of perpetuity.

- Why Land Trust Accreditation
- Defining Accreditation

How Accreditation Works

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. 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.

Each accredited land trust completes a rigorous review process and joins a network of organizations united by strong ethical practices. This trusted network of land trusts has demonstrated fiscal accountability, strong organizational leadership, sound transactions and lasting stewardship of the lands they conserve.

“For Joshua’s Trust, accreditation is the clearest evidence we have to show our members, our donors and our communities that we’re doing the best we can to protect our land in perpetuity,” said Doug Hughes, board president. “Our commitment to following these rigorous standards makes our organization stronger, and much better able to meet whatever challenges the future will bring.”

Get to Know the Commission

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

- History, Goals and Objectives
- 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 (2006)

The Accreditation Seal

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

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

Excellence

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

Trust

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

Permanence

Land trusts help conserve land that is essential to our health and well-being. When land trusts agree to protect land for the benefit of the public, in most cases they do so by promising that the protection is forever. The accreditation program verifies that the land trust has the policies and programs in place to keep this promise, either by caring for the land itself or transferring the land to an entity that can.
“When people see that the Gallatin Valley Land Trust has once again earned the seal of accreditation, they have a deeper respect and confidence in us and our work. This is important for the success of our organization and our ability to conserve land in our region. The seal represents the very best of who we are and what we do.”

*Penelope Pierce, Executive Director, Gallatin Valley Land Trust (2014)*

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**About the Commission**

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

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

Core Values

Role of the Commission

Role of the Alliance

Role of the Public

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**Core Values**

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

- **Integrity.** To be clear and honest in our communications with land trusts, the public and others; to build trust in, and respect for, the accreditation program; to respect the confidentiality of data provided to us.

- **Accountability.** To operate an accreditation program that is fair and makes consistent decisions; to learn from and respond to the land conservation community, the public and other stakeholders.

- **Service.** To manage an accreditation program that is efficient and makes productive use of participants' time; to work cooperatively with land trusts of all types and sizes as they go through the accreditation process.
Role of the Commission

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

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

The Commission follows best practices in accreditation.

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

Role of the Alliance

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

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

Role of the Public

Special places exist in every neighborhood, city and town – the family farm, the urban park, the mountain view. Accredited land trusts are making sure that the places we love today will be loved by generations to come. Public accountability is a key component of the accreditation program; the public is invited to provide information in accordance with the Commission's "Feedback, Comments and Complaints" policy. Use the buttons on the right to comment on an applicant or accredited land trust or to provide feedback to the Commission.

“When we learned our local conservancy was accredited, it was further confirmation of our choice to trust it to protect our land forever. Accreditation is an assurance of the high standards the conservancy uses to protect land today and for future generations.”

- Dick Shuster; Dick and his wife Posy donated a conservation easement to the Leelanau Conservancy (MI)

Find an Accredited Land Trust near you.

Visit the Land Trust Alliance page for more information on conserving your land.
Benefits of Accreditation

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

What Accreditation Means To Land Trusts

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

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

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

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

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

“Without a doubt, the land trust accreditation process made us a much stronger organization that created a strong pathway to our sustainability. It was a rigorous and extensive process, and we commend the Accreditation Commission for its professionalism in its review and guidance throughout our application.”
- Bob Bugert, Executive Director, Chelan-Douglas Land Trust (WA, 2013)

“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 is an investment that pays back on many levels.”

- Doug Sensenig, Executive Director, Coastal Mountains Land Trust (ME, 2013)

**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 Manual* was most recently updated April 2016. In August 2017, the Commission released a 2018 draft Requirements Manual and held a public comment period on new accreditation requirements. The final 2018 Requirements Manual will be released in March 2018.
- Infographic: *Accreditation and the New Legal Defense Reserves Calculator* (for more on this new resource from the Land Trust Alliance, visit The Learning Center)

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

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

Information about Past Editions

Providing Feedback

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

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

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

**How are the requirements created?**

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

**How often is the Requirements Manual revised and how will I know?**

Requirements are reviewed annually to ensure they reflect current practice in the land trust community and they remain practical for verifying compliance with accreditation requirements. The process starts with a committee looking at comments from the land trust community as well as issues identified in applications throughout the year. This is followed by a public comment period. The Commission approves the annual *Requirements Manual* edition each spring.

We announce any public comment periods followed by the availability of the newest edition, via emails, webinars and other outreach, highlighting changes and giving advance notice for changes that take effect in the future. Our website has the current version, redline versions of past editions, and a summary of changes over time. You can provide your comments about the manual and give any other feedback about the program using the comment button on our website.

The Commission released the 2018 draft Requirements Manual on August 23, 2017 during its latest public comment period, which closed on September 30. Learn more about the changes and the next steps for releasing a final version in March 2018.

**How do the requirements account for flexibility?**

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

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

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

**Providing Feedback**
The Commission welcomes feedback on the Requirements Manual at any time from the land trust community and other stakeholders. Comments for next year’s edition are most useful by October to ensure that they are considered as part of the annual review process.

First-Time Accreditation Process

Welcome!

Welcome to first-time accreditation! Accredited land trusts say that the process of applying for accreditation can sometimes be overwhelming, and yet gratifying once accreditation is achieved (read testimonials here). In this section we strive to make it as easy as possible to explore and understand the process and requirements. Take a look around, and contact us if you still have questions.

Accreditation Principles

The following principles guide the accreditation program.

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

Getting Ready and Registration

You’ve done the hard work, and now it is time to receive the recognition! Through the voluntary land trust accreditation program your land trust will grow stronger and can have external verification that it is meeting national quality standards. Read more about registration for 2020 (the Commission will only be accepting renewal applications in 2019 due to the high volume of renewals).

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

Land trusts should apply only when they are confident they are able to complete the entire application and assemble all documents. It should be noted that substantially incomplete applications will be returned and the fees forfeited. Organizations should expect that it will take several months of internal review and discussion before the application is complete and ready to submit. Applicants should plan accordingly.

To get started, visit the links below.

Ready to register? Visit our Registration page to learn more about when and how to register.

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

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

Registration

Registration is the first step in the accreditation process. Registration is open for a limited period of time, and opens each May or June for the following year.

As part of the registration process, registrants must attest that they meet the registration eligibility requirements, commit to meeting pre-application and application requirements, and pay a registration fee in order to proceed to the pre-application step.

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

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

Pre-Application

The pre-application is the second step in the accreditation process. Pre-applicants provide basic information about the organization and required attachments to demonstrate that they meet pre-application requirements in order to proceed to the application step.

Pre-Application Requirements:

• A complete pre-application and all required attachments.
• In addition, pre-applicant must demonstrate the following at the time of pre-application:
  o That each conservation easement has a baseline documentation report.
  o That each conservation easement has been inspected annually for three calendar years.
  o That each fee property has a management plan or management summary.
  o That each fee property has been inspected annually.

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

Application

Applicants provide a completed the application questionnaire and all supporting documentation.

Application Requirements:
A complete application questionnaire.
Evidence that the applicant is meeting each of the accreditation indicator elements by including:
  o All required attachments indicated on the Master Attachment Checklist, and
  o The project documentation indicated on the Project Documentation Checklist.

The Requirements Manual describes how a land trust can demonstrate that it meets each indicator element.

Read more about the application >>

Frequently Asked Questions

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

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

Getting Accreditation Buy-In from Your Board

Need some help talking with your board about why accreditation is a great idea for your land trust? The Alliance has a new information piece with stories from accredited land trusts, in their own words, about how accreditation has transformed and strengthened their organizations. This may be just what you need to inspire your land trust to take the leap and register for 2020. View and download today »

Preparation

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

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

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

When your land trust thinks it is ready to demonstrate compliance with the Land Trust Standards and Practices* and the accreditation requirements, test this assumption with a careful review of the Application (including the Master Attachment Checklist), and Project Documentation Checklist, available here.

  o Read each requirement and the list of required documentation you will be asked to submit.
  o Identify if each document exists, where it is, and if it is of sufficient detail to demonstrate compliance. Most groups who go through this the first time find gaps. The next step is to develop and implement a plan to fill those gaps.

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

When an organization is confident that it can demonstrate that it is meeting the practices, it should begin the process by registering to apply. Next you can put together the accreditation team and start pulling all the materials together!
If you are ready to apply, the **first-time accreditation information** is a must-read. It provides detailed information on the program requirements and application process. If your organization needs information on how to document implementation of the requirements, the *Requirements Manual* is essential. For assistance with assessments or advice on how to implement the accreditation indicator elements, the Land Trust Alliance's online tool, **The Learning Center**, is a good place to start.

The Commission also has many online tutorials and presentations available.

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

* Land trusts will no longer be required to complete an assessment against all of the Standards, beginning in 2018. While an assessment is no longer required for accreditation, they remain a worthwhile and useful activity in preparing for first-time application or renewal.

- Assessments conducted before applying for accreditation may help land trusts identify areas that need more work before submitting an application.
- Completing periodic assessments against the full set of practices helps land trusts set benchmarks for continuous improvement.
- A new assessment helps measure progress against your past benchmarks.
- The Alliance is considering new assessment tools for the revised *Land Trust Standards and Practices*, however these are not expected any time soon.

**Start the Conversation**

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

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

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

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

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

Registration for 2018 occurred in June 2017. The process was the same as in recent years, with a registration lottery, however land trusts that register for 2018 will be using a "Transition Application". See the due dates, transition application materials, and fee schedule for 2018.

- Read the lottery registration overview.
- Fill out the Letter of Intent.

Looking for renewal registration?

Prior to registering, please download and review the following information.

1. For complete details about the information requested on the registration form, payment methods, etc., click here. Note that the $850 registration fee is payable electronically at time of registration.
2. For past accreditation fee schedules and "Frequently Asked Questions", click here. (2018 first-time accreditation fees will be posted here in mid-April.)
3. For the "Are You Ready" checklist, click here.
4. For the Benefits of Accreditation fact sheet, click here.

The Accreditation Process

The accreditation process is described on this website, and in the corresponding Applicant Handbook. These resources include information on eligibility and readiness, tips for getting started, how to complete the application, what to expect once an organization has applied, and Commission policies and procedures. In addition, the accreditation process is integrally linked to the Requirements Manual, which includes information on how to document implementation of the indicator elements; this is updated annually.

Application Rounds and Due Dates

If your land trust is planning on registering for 2018, the following information will be helpful.

- 2018 Round 1 application due date: April 5, 2018 (pre-application due January 18, 2018)
- 2018 Round 2 application due date: September 13, 2018 (pre-application due June 21, 2018)

Expressing Informal Intent for Future Years

Organizations that would like to express their intent to register for a future year may do so by completing a short online survey.

Note: Land trusts that submit an application in one year will have a decision from the Commission sometime in the following year, as the process takes 8-10 months from the time the application is submitted. Please factor this into your planning process.

Note: in 2019 the accreditation program will accept only renewal applications due to an extraordinary volume of renewal applicants that year. In addition, the new first-time application based on the 2017 Standards will not be available until 2019. Read more about the 2017 revised Land Trusts Standards and Practices and its impact on the land trust accreditation program.
Renewal Registration

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

Pre-Application and Attachments

Each potential applicant for first-time accreditation is required to submit a complete pre-application questionnaire with all required attachments. The pre-application materials enable the Commission to confirm that land trusts meet basic program requirements before they are invited to submit a complete application. If invited, data from the pre-application is used by the Commission to select projects for which the applicant will need to submit detailed documentation with its application. The pre-application is due approximately 10 weeks before the complete application is due.

Pre-Application Questionnaire

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

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

Tip: The information provided must be no older than three months prior to the pre-application due date.

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

Pre-Application Attachments

- **PreApp1** Page 1 of the most recently filed Form 990 (or Form 990-EZ or Form 990-N, as applicable) [Please include page 1 of the actual form, not the e-file or accountant cover page.]
- **PreApp2** Land Conservation Project List(s) - Read more >>
- **PreApp3** Schedule of Dedicated and Restricted Funds - Read more >>
- **PreApp4** Legal Defense Reserves Calculator - Read more >>
- **PreApp5** Accreditation Agreement - (Last three pages of the Pre-Application Questionnaire). *The Accreditation Agreement obligates the organization to abide by the terms and conditions of the accreditation program. It should be signed by an individual with the authority to enter into contracts on behalf of the organization.*
- **PreApp6** Articles of Incorporation - Include your organization’s recorded, original Articles of Incorporation and all amendments and/or restatements.
- **PreApp7** Final tax determination letter from the Internal Revenue Service
• **PreApp8** (If applicable) If your organization is not a current land trust member of the Land Trust Alliance, provide a board resolution adopting the 2004 or 2017 version of *Land Trust Standards and Practices*. Please use the resolution included in Standards and Practices.

**Submitting Your Pre-Application**

Your organization’s Pre-Application Questionnaire and all attachments must be mailed to be received by the Commission no later than the due date. *This is not a postmark deadline – please plan ahead to make sure your submission arrives in the Commission’s office by that date.* Applicants must provide the Pre-Application Questionnaire and all attachments electronically on a CD/DVD/USB. Mail or ship your organization’s pre-application materials to the Commission’s office.

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

*Please note that in 2020 the entire first-time application process will be online.*

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

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

**Commission Review of Pre-Application**

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

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

**Pre-Application Acceptance and Project Documentation Request**

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

**Public Notice**

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

**Frequently Asked Questions**

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

The Commission may determine that a land trust’s pre-application cannot be accepted if:
• the land trust does not meet the eligibility and registration requirements;
• the land trust does not meet the pre-application requirements;
• the land trust is not primarily engaged in the active acquisition or stewardship of conservation land or conservation easements;
• the land trust would not be able to document compliance with the indicator elements and/or is not a strong candidate for accreditation;
• the pre-application documents are in unacceptable condition; and/or
• the pre-application is not otherwise able to be processed effectively.

Pre-applicants will be notified of this decision at least five weeks before the application due date about the status of its pre-application. If the Commission determines that a pre-application cannot be accepted, the organization will need to re-register when it is ready to apply. The registration fee is nonrefundable and nontransferable.

When were the pre-application materials most recently updated?

In April 2017, the Commission revised the pre-application materials that land trusts will use in 2018. We are developing pre-application materials that first-time applicants will use in 2020 and beyond. There will be no first-time applications in 2019, only renewals. Learn more

How do you use the time-tracking information requested?

Aggregate data from the time-tracking form 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. Although this form is optional, we appreciate the efforts of land trusts who track the time it takes to complete the application process.

**Project Selection and Documentation**

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

**Overview**

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

**Number of Projects Selected**

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

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

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

**Frequently Asked Questions**

*Can we redact confidential landowner information from our project documentation?*

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

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

The Commission is unlikely to select more than six projects in any category. However, it is possible in instances where organizations have a variety of unique projects, have multiple interlocking corporations holding land, or have hundreds of projects well above the norm. The review team may also request documentation for more projects if it believes this information is needed to make an accreditation decision.

*If our land trust did not complete any new projects in the past ten years, will it have to provide any project documentation at all?*

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

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

Within five weeks of the application due date.

*Can we provide an additional project?*

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

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 (45 days after the application due date) and the requirement that comments must relate to the Standards from Land Trust Standards and 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

<table>
<thead>
<tr>
<th>Possible Outreach Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board and advisory committee members</td>
</tr>
<tr>
<td>Broadcast email, printed newsletters, meetings, webpage item coupled with outreach directing readers to website, other methods that achieve the same outcome</td>
</tr>
<tr>
<td>Staff</td>
</tr>
<tr>
<td>General members and/or donors</td>
</tr>
</tbody>
</table>

### External Stakeholders

<table>
<thead>
<tr>
<th>Possible Outreach Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elected officials</td>
</tr>
<tr>
<td>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</td>
</tr>
<tr>
<td>Public agencies</td>
</tr>
<tr>
<td>Area residents</td>
</tr>
<tr>
<td>Community organizations</td>
</tr>
<tr>
<td>Conservation groups</td>
</tr>
</tbody>
</table>
Land trust networks or coalitions

Abutters to actively managed or highly used land trust properties

Template Public Notice Form

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 the Standards from Land Trust Standards and Practices, 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. Download a template public notice form

When do we document that we completed our public notice?

Include a copy of the notice(s), along with a short summary of who was notified and when, in your application. The application is not complete without a copy of the notice(s).

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

No. Paid notices and/or advertisements, special color-printed notifications, etc., are not required.

Do you have any examples of public notice strategies from other applicants?
We secured permission to share the following public notice strategy from Triangle Land Conservancy (NC). It is simple, and follows the guidance above.

<table>
<thead>
<tr>
<th>Outreach Method</th>
<th>Stakeholders Reached</th>
<th>Documentation for Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadcast Email</td>
<td>TLC Email list (~450 community members)</td>
<td>Copy of email and specific # of emails sent</td>
</tr>
<tr>
<td>Targeted Email</td>
<td>Board and advisory committee members, staff, volunteers, conservation groups, land trust networks, partner community organizations, public agencies</td>
<td>Copy of email and mailing list</td>
</tr>
<tr>
<td>Press Release</td>
<td>Area residents, public agencies, elected officials</td>
<td>Copy of release and distribution list</td>
</tr>
<tr>
<td>Spring Newsletter article</td>
<td>Members, corporate supporters, property neighbors, partner organizations</td>
<td>Copy of newsletter and description of mailing list (size and type)</td>
</tr>
<tr>
<td>Webpage and social media</td>
<td>Members, community members, community organizations</td>
<td>Note about posting and associated outreach</td>
</tr>
</tbody>
</table>

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

All comments are shared with the review team. If a comment indicates that a land trust may not be in compliance with the Standards or accreditation requirements, 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.

Application and Project Documentation

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

Application Questionnaire

Application Attachments

Project Documentation

Submitting Your Application

Frequently Asked Questions

Watch the Video Tutorials: Application and Project Documentation

Application Questionnaire

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

_TIP: Please note that if your organization has a related entity, such as a supporting organization or an LLC, there is important additional information that will be required from the related entity, too. More details and application addenda are available in the Application Toolkit to the right._

The first-time application materials are submitted in paper except as noted below.
**Application Attachments**

*Master Attachment Checklist*

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

**Tab: Application Questionnaires** This section has your completed questionnaires. Reviewers will repeatedly go back and forth between this section and the attachments. Being able to easily find the questionnaires helps the reviewer.

**Tab: Preliminary Attachments** These attachments provide introductory information about your land trust and its conservation work.

**Tab: Master Policy Documents (Optional)** If your organization has a large policy manual, such as a board manual or land protection manual, that you refer to often throughout the application, you may prefer to include it in this section in its entirety. This is optional.

**Numbered Tabs 1–12** (for Attachments for Standards 1–12) These sections, organized by Standards, contain all of the material required to document compliance with indicator elements and accreditation requirements.

**Completing the Checklist** In the column labeled “Check,” applicants should check off those items that are included in their application. In the column labeled “Location,” applicants should note the tab where the attachment is located. If the title of the actual document is different from the one on the checklist, there is space for you to indicate the proper title on the checklist under “Document Name.” Unless noted as “if applicable” (as dictated by your response to a question on the application questionnaire), listing all documents on the checklist is required unless it would be clear to a reviewer that they do not apply to your organization.

**Numbering and Labeling Attachments**

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

**Pre-formatted and numbered labels** are available for download from the Commission’s website.

Applicants may type or hand-write the name and date of the document and the relevant indicator element(s) on a sheet of paper just before the attachment. (This may also serve as a divider; see below.)

You may simply hand-write on the top of the attachment the name and relevant indicator element(s).

**Separating Attachments**

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

*TIP: It is preferred that attachments not be stapled as staples make it more difficult for reviewers to flip between documents.*
Documents That Apply to More than One Indicator Element

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

*TIP: The application requests copies of appraisals. To reduce copying expenses, you may include the appraisal summary in the application itself and provide the full appraisal on a CD/DVD/USB. Watch video tutorial*

*TIP: Forms 8283 may also be required. The Forms must include the landowner’s name, but the Commission encourages you to redact the social security or tax identification number. If the land trust has a copy of the supplemental statement filed with the Form 8283, please include it as well.*

Project Documentation Checklist

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

To compile your project documentation, review the checklist and identify the documents on the checklist that you have for the project in question. Note on the checklist any comments that will help reviewers understand the project. Here are a few examples of how the checklist helps identify the documents that should be provided for a project. In the 2017 and 2018 accreditation application:

A donated conservation easement completed in the past year should have documentation for the following practices on the checklist: practice 3F, practice 5A, practice 8B, practice 9H, practice 10B (if the donor had claimed a tax deduction), practice 11A, and practice 11B.

A purchased conservation fee property completed in the past year should have the following documentation for the following practices on the checklist: practice 3F, practice 5A (if the donor had claimed a tax deduction in the case of a bargain sale), practice 8B, practice 9H, practice 9J, practice 10B (if the donor had claimed a tax deduction in the case of a bargain sale), practice 12A, and practice 12C.

In addition, projects completed within the past five years will likely have more robust documentation than projects completed twenty years ago.

Once you have identified the list of documents that are available for the project, secure and label each document with the corresponding attachment number.

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

Project Documentation Checklist
Submitting Your Application

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

Paper versus Electronic
Unless otherwise noted, all material submitted to the Commission must be submitted on paper, in three sets. In those cases when the Commission encourages electronic submissions (the pre-application, appraisals, project documentation and response to any additional information requests), applicants may submit the requisite number of CDs/DVDs/USBs (watch video tutorial). We generally do not accept material via email.

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

TIP: The application does not need to be printed in color.

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

Shipping
Complete applications must be delivered to the following address:

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

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

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

Frequently Asked Questions

When was the first-time application last revised?
In April 2017, the Commission revised the first-time application materials that land trusts will use in 2018. We are developing application materials that first-time applicants will use in 2020 and beyond. There will be no first-time applications in 2019, only renewals. Learn more

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

Sample Agenda for Applicant Call with Commission Review Team (we are currently updating some of our sample documents so check back for a new version soon)

Sample Additional Information Request (we are currently updating some of our sample documents so check back for a new version soon)

Sample Accreditation Award Letter (we are currently updating some of our sample documents so check back for a new version soon)

**Review Process and Commission Decision**

Each applicant is assigned a review team consisting of at least one commissioner and one Commission staff member. The review team reviews each complete application in detail. Most of the information evaluated by the review team is from the applicant; additional information may be provided by the public and still other information may be the result of research conducted by the Commission. Relying on multiple sources of information helps ensure credible decisions that maintain the integrity of the accreditation program.

**Commission Research**

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

**Application Review**

The review team examines all of the information it has to determine if the applicant is implementing *Land Trust Standards and Practices* and meeting the accreditation requirements. The review team not only examines an applicant’s written policies (for example, a conflict of interest policy or amendment policy), but also looks for evidence that the policy and accreditation requirements are actually followed.

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

- **In making its findings, the review team keeps flexibility in mind.** There is a wide diversity of approaches that land trusts use to implement the Standards and accreditation requirements.
- **Commissioners reflect the diversity of the land trust community** and use their extensive knowledge to help ensure that the review is flexible and practical.
• **The Commission uses a variety of systems to ensure consistency** in the review process including having staff and commissioners serve on a variety of review teams, using the *Requirements Manual* as a reference, and having feedback systems between staff, commissioners, Commission committees and the full Commission. For more information see the *Saving Land* article, “Collaboration and Consistency: Ensuring Fairness in the Accreditation Process” and the Commission's "Consistency Checks" diagram.

**Applicant Conference Call**

The review team will hold one phone call with the applicant to give the applicant an opportunity to answer questions the review team may have about the application. *Read about the applicant call, from a land trust's perspective.*

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

*TIP: This call will be scheduled in advance at a date and time that works for all parties.*

*TIP: Applicants will receive a detailed call agenda approximately one week prior to the scheduled call detailing the questions the review team would like to discuss.*

*TIP: Once the call is scheduled, the applicant may want to block some time about six days prior to the scheduled date to review the call agenda and assign the appropriate people to join the call and respond to specific questions. Participation from board members is strongly encouraged and appreciated.*

**Site Visit:** The Commission reserves the right to use site visits as a check on the document-based process and to verify organizational practices or land conservation work on the ground. *No site visits are planned at this time.*

**Additional Information Request**

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

• If applying with related entities, any additional information requests for the related entities will be included in the one additional information request described above.
• At this time we will also request a copy of the First-Time Applicant Time Tracking Form.

**Commission Decision**

The Commission makes final decisions on each complete application based on the review team's evaluation of the applicant's compliance with *Land Trust Standards and Practices* and accreditation requirements.

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

A land trust may appeal a decision to not award accreditation by following the Commission's Appeals Policy and Procedures.
Useful Documents

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

- Our website! It contains all necessary information about the accreditation process from a to z. See especially the first-time application process and video tutorials (essential information encapsulated in an Applicant Handbook) for instructions on each of the forms listed below.
- The Requirements Manual, which contains important information on the elements the Commission evaluates for every accreditation indicator element

Required Forms and Documents

Once your team understands the process and accreditation requirements, begin working on the following forms and required supporting documentation.

- The Lottery Registration Form. This is actually an online form only available when the lottery registration is open, typically the spring/summer prior to the year you intend to apply for accreditation.
  - To learn more about the lottery registration, [click here](#).
- The Pre-Application Forms. These are the forms required for a complete pre-application, which is due in our office about three months prior to the application.
  - The Pre-application Questionnaire and Accreditation Agreement | [Word version](#) | [PDF version](#) | Instructions
  - The Land Conservation Project List (LCPL) | Instructions | Video Tutorial
  - The Schedule of Dedicated and Restricted Funds (SDRF) | Instructions | Video Tutorial
  - A completed Legal Defense Reserves Calculator (*requires Alliance log-in*). | Video Tutorial | [View this one-pager for more information about the calculator (link is external)](#) If you have additional questions, please contact Conservation Defense Coordinator Lorri Barrett at 202-800-2219 or lbarrett@lta.org.
  - Time-Tracking Form | Download this form to start tracking the time your land trust spends on your pre-application, application, and so-on (it is optional but appreciated!)
  - (If requested from the Commission) Pre-Application Addendum for Multiple Corporations: Intermediate Level | Commission Policy on Multiple Corporations
- The First-Time Application Forms. These are the forms required for a complete application, and includes all required supporting and project documentation.
  - Application Questionnaire | Instructions | Video Tutorial | Application Statements Templates
Helpful Sample Documents

- Documents commended by the Commission and shared by accredited land trusts | Login and Download
- Sample Agenda for Applicant Call with Commission Review Team | Download (we are currently updating some of our sample documents so check back for a new version soon)
- Sample Additional Information Request | Download (we are currently updating some of our sample documents so check back for a new version soon)
- Sample Accreditation Award Letter | Download (we are currently updating some of our sample documents so check back for a new version soon)

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

- Application Attachment Labels (Avery 5160/8160; May 2016)

Sample Review Correspondence from Commission to Applicant

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

Sample Agenda for Applicant Call with Commission Review Team
Sample Additional Information Request
Sample Accreditation Award Letter

Timeline and Costs

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

Prior to committing to accreditation, each land trust should ensure it has a team of people who can dedicate the time to prepare and complete the pre-application, the application, and requested project documentation. Also, ensure that your accreditation team is available during the accreditation application process (at least through the response to the additional information request), which takes 8-10 months from the time the application is submitted. For instance, land trusts that submit an application in 2018 will have a decision from the Commission no earlier than 2019. Please factor this into your planning process.

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

- 2018
What will your land trust get from the Commission in return for its accreditation fees?

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

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

Where to Go for Help

Commission Materials:

- Website and Applicant Handbook
- Requirements Manual
- Fact sheets
- Advice from land trusts that have achieved accreditation
- Commended documents and policies from Accredited Land Trusts
- Webinars and videos

Land Trust Alliance Resources

Training

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

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

The Learning Center

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

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

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

Saving Land Magazine

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

Expert Link

Expert Link is the Alliance’s online directory in which members of the land trust community can seek out professional assistance from Alliance-member companies. Expert Link is divided into three categories for quick and easy access to a professional partner that best suits your needs: Appraisers, Attorneys, and Consultants

Publications

The Alliance offers an extensive selection of publications for land trust practitioners. A sample of the selection offered is below:

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

See the complete catalog.

State Service Centers

Land trust service centers - also known as councils, service bureaus, coalitions, alliances, and compacts - work closely with the Land Trust Alliance and land trusts to deliver services and technical assistance that strengthen local and regional organizations that conserve open space.

Visit www.landtrustalliance.org/state-associations to find a service center in your region.

Maintaining Accreditation

Here are a few steps to help your land trust maintain its accreditation and prepare for its next renewal.
• Implement any Expectations for Improvement.
• Annually review the Requirements Manual.
• Keep track of any unique set of facts and circumstances that resulted in not meeting one of the accreditation indicator elements or accreditation requirements throughout the accredited term.
• Contact the Commission’s Help Desk if you have questions.

Continuous Improvement

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

Conditions for Maintaining Accreditation

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

• To comply with the accreditation indicator elements 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 elements 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 elements or accreditation 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 accreditation requirements. Changes that require written notification include the following:

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

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

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

*Confirming Compliance*

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

*Disciplinary Action*

While extremely rare, an accredited land trust can be placed on probation and accreditation can be revoked according to the Commission’s *Disciplinary Action Policy and Procedures*. This policy helps maintain the integrity of the accreditation program for all participants.
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/](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 (including the Master Attachment Checklist), and Project Documentation Checklist are available on the Commission’s website at: [http://www.landtrustaccreditation.org/the-process/application](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.

**To Advance to the Next Field**
• 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.

To Go Back to the Previous Field
• Press Shift+Tab to go to back to the previous field.

To Escape
• 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. Download the form as part of the first-time Application for Land Trust Accreditation and save it to your hard drive or network. 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.