

Is your land trust considering applying for first-time accreditation? We know that it takes time for a land trust to be ready for the accreditation process. For some organizations, applying for accreditation is part of a long-term strategic plan. Time spent preparing for accreditation is time well spent and makes your organization stronger; land trusts should only apply when they are confident that they are able to document they are meeting the Standards and accreditation requirements.



**Need a refresher on what resources all land trusts considering accreditation should have on hand? Read and review:**

- [Is my Land Trust Ready to Apply for First-Time Accreditation](#)
- [Part I, Be Prepared: Review Your Policies](#)
- [Part II, Be Prepared: The Importance of Annual Monitoring and Inspections](#)
- [Part III, Be Prepared: Recordkeeping](#)
- [Part IV, Be Prepared: Don't Forget the Date](#)
- [Part V, Be Prepared: Annual Financial Evaluations](#)

## How to get started

Over the next several editions of the Commission's e-newsletter, we'll explore how your land trust can prepare for first-time accreditation. This month we'll look at the minimum policies required for accreditation.



[accordion id="a1" heading="Click for Tip about Resources"]

We'll be referring to requirements from the Commission's *Requirements Manual* and *Land Trust Standards and Practices* published by the Alliance. Remember, accreditation uses indicator elements from the Standards as the basis for the requirements. It's helpful to have a copy of the [Requirements Manual](#) handy and to log into your [Alliance Resource Center](#) account before clicking the links below.

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## Required Policies

**Conflict of Interest Policy** *for all land trusts* – A conflict of interest policy addresses, for all insiders, how conflicts are identified and avoided or managed.

**Review on the Resource Center:**

- [Practice Element 4A1](#)
- Take the course, [Learn Practice Element 4A1 & 4A2: Managing Conflicts of Interest](#)
- [See an example of a compliant conflict of interest policy](#)

**Review in the *Requirements Manual*:** Governance V.2



[accordion id="a2" heading="Click for Tip about Insiders"]

It's crucial to remember that "insiders" includes board and any staff members; substantial contributors; parties related to board and any staff members, and substantial contributors; those who have an ability to influence decisions of the organization; and those with access to information not available to the general public. Check that your policy includes all these insiders.

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**Recordkeeping Policy** *for all land trusts* – A recordkeeping policy governs how and when organization and transaction records are created, collected, retained, stored and destroyed.

**Review on the Resource Center:**

- [Practice Element 9G1](#)
- Take the course, [Learn Practice Element 9G1: Adopting Recordkeeping Policies](#)
- [See a sample template of a recordkeeping policy](#)

**Review in the *Requirements Manual*:** Governance V.1

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**Conservation Easement Enforcement Policy** *for all land trusts that hold conservation easements* – A conservation easement enforcement policy includes written procedures for documenting and responding to potential conservation easement violations.

**Review on the Resource Center:**

- [Practice Element 11E1](#)
- Take the course, [Learn Practice Element 11E1: Adopt a Conservation Easement Violation Policy and Procedures](#)
- [See a sample conservation easement enforcement policy](#)

**Review in the *Requirements Manual*:** Stewardship III.1

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**Conservation Easement Amendment Policy** *for all land trusts that hold conservation easements* – A conservation easement amendment policy addresses conservation easement amendments that are consistent with the Land Trust Alliance Amendment Principles.

**Review on the Resource Center:**

- [Practice Element 11H1](#)
- Take the course, [Learn Practice Element 11H1: Adopting a Strong Amendment Policy or Procedure](#)
- [See a sample conservation easement amendment policy](#)

**Review in the *Requirements Manual*:** Stewardship III.2

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**Delegation Policy** *for any land trust that delegate project approval* – A delegation policy (or bylaws provisions) is needed if the board delegates decision-making authority on transactions.

**Review on the Resource Center:**

- [Practice Element 3D1](#)
- Take the course, [Learn Practice Element 3D1: Board Approval of Land and Conservation Easement Transactions](#)
- [See a template board policy for delegating decision-making authority on transactions](#)

**Review in the *Requirements Manual*:** Transactions II.5

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## Strategies for reviewing them:

Having each of these policies as applicable is essential for any land trust to be accredited; so it is important that each one is reviewed for compliance before you consider applying. Some land trusts review one policy each board meeting others create a month-by-month plan. However your land trust chooses to approach policy review, the best strategy includes understanding the reasoning behind the practice element and its intent along with the technical aspects of the accreditation requirements.

## What does the Commission look for?

As part of the pre-application process, you will be asked to provide each of the applicable policies/ procedures. The Commission will verify that each meets the requirements.

The Commission also looks for documentation of how the land trust is implementing these policies and the related accreditation requirements. This verification is done through the documents in the main application, project documentation, or targeted verification. Based on what your land trust provides in the pre-application, your review staff member may select specific targeted verification items to be provided in the main application. Targeted verification includes documentation of how the land trust met the requirements in a specific area.

For example, in the pre-application a land trust may disclose that four conservation easements were amended. The Commission may select specific documentation to be provided in the main application about one or more of the

amendments. The review team then verifies that the land trust followed its policy/procedure and documented it met the requirements (see the *Requirements Manual* Stewardship IV).