

Your responses to the application questionnaire determine the list of supporting documentation that will be required from your organization. Accreditation involves a mix of required documents and sampled documents to confirm that the land trust is following *Land Trust Standards and Practices* and meets the accreditation requirements. Some documents are required from all renewal applicants (such as policies); some documents are required depending on a land trust's application responses (see example, below); and some documents are sampled as requested by the Commission (such as a baseline documentation report and easement monitoring reports from an older project).

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Tips for Responding to Application Questions

When an applicant submits its renewal application, it attests that "the material provided in this application is an accurate reflection of our organization's policies and operations." When reviewing an application, the Commission review team compares the application responses to the supporting documentation. There are two types of application questions to pay particular attention to when you are filling out the application.

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



Tip:

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

Application Documentation

The application requires written statements as attachments, generally for detailed narrative responses. You may have written materials (such as policies, procedures, checklists, etc.) that answer the question; these may be included in support of your statement. If the written materials fully describe your response, you can provide those in lieu of a separate statement.

How Detailed an Answer?

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

Changed Practices

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

New Policies

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

Disclosure: An Easy Path or Rocky Path

As part of a renewal application we sample projects and other documentation to verify compliance with a number of accreditation requirements. The renewal process works best when a renewal applicant accurately responds to each question and, as needed, provides any explanation and documentation related to unique circumstances or lapses. On the flip side, the renewal process is substantially more tedious and time-intensive when a renewal applicant inaccurately (knowingly or not) responds to a question, at which point the review team has to follow up to understand what and how deep the issues are.

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

Disclosure: An Easy Path	Non-Disclosure: A Rocky Path
<p>A land trust did not investigate title for one project during its accredited term. The land trust responded "not always" to the question in the application about title, then it provided an explanation in the associated required statement: that it had one project completed without title investigation, why the title was not complete, that the land trust had since completed an investigation of title retroactively, and that it now has internal procedures that ensure title is investigated before closing for every project.</p> <p>By chance, that project had also been selected for review. The review team could see that the title investigation was completed retroactively and prior to knowing that this project was selected. Since this had been disclosed in the application, there were no further questions on this particular project's title. The other projects sampled all had contemporaneous title investigations that met the requirements.</p> <p>The land trust did not have to provide any additional documentation.</p>	<p>A land trust did not investigate title for one project during its accredited term. It responded "always" to the question to the question in the application about title and did not include any additional information.</p> <p>By chance, two of those projects were selected for review, and the review team had noticed that the title investigations had not been completed and that there was no explanation or rationale.</p> <p>Because the land trust did not disclose or address the lack of title investigation, the review team had to issue the following complex documentation request to the land trust.</p> <ol style="list-style-type: none"> <i>Please provide documentation of title investigation for [PROJECT NAME].</i> <i>Alternatively, if the organization did not obtain a title investigation for either of these projects at the time of acquisition, please complete the following:</i> <ol style="list-style-type: none"> <i>Review all transactions completed since accreditation was last awarded to determine how many fee properties and/or conservation easements were acquired without completing a title investigation at or before acquisition.</i> <i>For all of the projects missing title investigations, complete a retroactive title investigation identifying the legal owner and mortgages, mineral leases or other elements specified in the practice 9H as shown above.</i> <i>Provide the retroactive title investigations for [NAME OF PROJECT].</i> <i>Provide a list of the other projects that were missing documentation of title investigation, along with the date that title was completed.</i> <i>As part of the retroactive title investigation, if title issues are identified that might impair the ability of the organization to enforce a conservation easement or to protect the conservation values of a conservation easement or fee property, then also provide documentation that the organization examined the risk the title issues pose to the</i>

conservation values on the specific properties and that it determined whether any corrective action could or should be taken.

vi. Provide a policy or procedure that documents how the organization will ensure compliance with the requirement in the future.

Your land trust can avoid this lengthy and complex additional information request by completing each question accurately and with full disclosure.

Updated 6/21/19