## RENEWAL PRE-APPLICATION

### General

1. **Overview of Your Land Trust’s Land Conservation Holdings**
   a. Number of conservation easements now held: ____
   b. Number of conservation easement acres now held: ____
   c. Number of conservation fee properties now owned: ____
   d. Number of conservation fee property acres now owned: ____
   e. Does your Land Conservation Project List indicate that there are gaps in your annual conservation easement monitoring and/or annual fee inspections? □ yes □ no

2. **Land Trust Overview**
   a. Number of board members: ____
   b. Number of full-time staff: ____
   c. Number of part-time staff: ____

### Conflicts of Interest – Review Team Assignments

Please review the list of commissioners and application reviewers and the list of Commission staff. If your land trust has a real or perceived conflict of interest (positive or negative) with anyone listed, check the box next to the name(s) of the individual(s) [note: there will be a list provided in the online renewal application] and include a brief description of the nature of the real or perceived conflict(s). (Please note: this information will be used to assign non-conflicted members to the team that will review your application.)

### Attachments

- Accreditation Agreement ([download template](#)) *Note: applicants can chose to sign a copy of this document and upload into the pre-application or use the e-Signature option in the pre-application to sign the agreement. The agreement should be signed by an individual with the authority to enter into contracts on behalf of the organization.
- Land Conservation Project List
- Land Conservation Project List Explanatory Statements

*If your Land Conservation Project List indicates that there are gaps in your annual conservation easement monitoring and/or annual conservation fee property inspections or a baseline or management plan was not completed on time, attach a statement explaining the circumstances that resulted in each non-compliance and how your organization has since ensured compliance with this practice.*

### Related Entities (This section only applies to those organizations with multiple related entities.)

For each entity providing basic-level information (as determined by the Commission), see the Addendum for Basic-Level related entities for required attachments.
For each entity providing intermediate-level information (as determined by the Commission), provide the following information and submit the required renewal pre-application attachments. See the Addendum for Intermediate-Level related entities for required attachments.

**Overview of Land Conservation Activities for the related entity**

a. Number of conservation easements now held by the entity: ____

b. Number of conservation easement acres now held by the entity: ____

c. Number of conservation fee properties now held by the entity: ____

d. Number of conservation fee property acres now owned: ____

**Finance Questions for the related entity**

1. What are your land trust’s total anticipated operating expenses for its current fiscal year?

2. What are your required Legal Defense Reserves as determined by your completed Legal Defense Reserves Calculator (right-click and select save link as). If your organization operates in more than one state, please use the Multiple State Legal Defense Reserves Calculator.

3. Using the results from your land trust’s completed Legal Defense Fund Reserves Calculator, does your land trust have the necessary board-designated or restricted defense funding?

**Governance**

1. Has your land trust had a land or conservation easement transaction (acquisition, sale, amendment, violation) with an insider over the accredited term?
   
   □ yes  □ no

   If yes, describe each land or conservation easement transaction (acquisition, sale, amendment, violation) with an insider over the accredited term and include:
   
   a. The name of the insider;
   
   b. Insider’s relationship to the land trust;
   
   c. Date of the transaction;
   
   d. Description of the transaction; and
   
   e. Description of how private inurement was avoided

2. Has your land trust completed a financial transaction (such as contracts for legal or bookkeeping services, rental payments, purchases of goods or services, loans) with an insider over the accredited term?
   
   □ yes  □ no

   If yes, describe each financial transaction with an insider over the accredited term and include:
a. The name of the insider;
b. Insider's relationship to the land trust;
c. Date of the transaction;
d. Description of the transaction;
e. The dollar value and how the value was determined; and
f. Description of how private inurement was avoided

**Finance**

1. What are your land trust’s total anticipated operating expenses for its current fiscal year:
   $_________________

2. What are your required Legal Defense Reserves as determined by Legal Defense Reserves Calculator (right-click and select save link as). If your organization operates in more than one state, please use the Multiple State Legal Defense Reserves Calculator. : $_________________

3. Using the results from your land trust’s completed Legal Defense Fund Reserves Calculator, does your land trust have the necessary board-designated or restricted defense funding?
   □ yes   □ no
   Note: If no, please prepare a defense funding plan to include with your application (such as plan that includes a specific funding target, specific strategies with timelines to meet the funding targets by the time of next renewal, a description of any new policies or procedures that will be implemented to carry out the plan).

   - Most recent Form 990 (or Form 990-EZ or Form 990-N) with all schedules and statements
   - A completed Schedule of Dedicated and Restricted Funds (SDRF) (See current document that will become an online form in new application.)
   - A completed Legal Defense Reserves Calculator (view tutorial on competing calculator here) Note: save the file to your desktop before completing the form.

**Stewardship**

1. Over the accredited term, have any of your land trust’s conservation easements been violated or is your land trust continuing to address older unresolved conservation easement violations?
   □ yes   □ no   □ not applicable

   - If yes, provide a statement describing each violation and include:
     a. The nature of the violation;
     b. How and when the issue was discovered, documented and investigated;
c. Who was involved at major steps in the violation process, including the role of the board and any co-holders; and
d. How the violation was resolved (or if unresolved, the steps being taken to resolve it)

2. Over the accredited term, have you had any ownership challenges on your land trust’s conservation fee properties or is your land trust continuing to address older unresolved ownership challenges (such as significant trespass, encroachments, adverse possession claims)?
   □ yes □ no □ not applicable

   If yes, provide a statement describing each ownership challenge and include:
   a. The nature of the ownership challenge;
   b. How and when the issue was discovered, documented and investigated;
   c. Who was involved at major steps in the process, including the role of the board and any co-holders/owners; and
   d. How the ownership challenge was resolved (or if unresolved, the steps being taken)

3. Over the accredited term, have any of your land trust’s conservation easements been amended?
   □ yes □ no □ not applicable

   If yes, provide a statement describing each amendment and include:
   a. Who requested the amendment and why;
   b. How the amendment resulted in a net beneficial or neutral effect on the protected conservation values;
   c. How your land trust analyzed the potential for private inurement and/or impermissible private benefit as a result of granting the amendment; and
   d. Who was involved at major steps in the amendment process, including the role of the board, any legal counsel, and any co-holders

4. Over the accredited term, have any of your land trust’s conservation easements been extinguished in whole or in part (such as boundary line adjustments or amendments releasing land from the conservation easement)?
   □ yes □ no □ not applicable

   If yes, provide a statement describing each extinguishment and include:
   a. Who requested the extinguishment and why;
   b. How your land trust followed the conservation easement terms with respect to obtaining judicial review or regulatory review (or obtained written legal counsel determination why judicial or regulatory review was not needed);
   c. How your land trust analyzed the potential for private inurement and/or impermissible private benefit;
d. What steps your land trust took to avoid or mitigate harm to conservation values;

e. Whether your land trust obtained any proceeds and how they were used; and

f. Who was involved at major steps in the process, including the role of the board, any legal counsel and any co-holders