FIRST-TIME ACCREDITATION INFORMATION SESSION: TIPS AND TOOLS FOR PUTTING TOGETHER YOUR BEST APPLICATION

Road Map

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

Accredit... “b: to recognize or vouch for as conforming with a standard”
What do we submit at this step?
- Accreditation Agreement
- Land Conservation Project List
- Schedule of Dedicated and Restricted Funds
- Legal Defense Reserves Calculator
- Descriptions of specified activities (verification statements)

Pre-Application Due: January 6, 2022
Pre-Application Review: January – February
Notification: ~ February 10, 2022

What are the special forms we have to complete?
- Land Conservation Project List

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

Video Tutorials
Completing the Land Conservation Project List
What are verification statements and how much detail do we need to provide?

Pre-Application and Attachments

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

Why might our pre-application not be accepted?

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

Pre-application requirements
- Baseline Documentation Reports
- Management Plans
- Annual Conservation Easement Monitoring
- Annual Conservation Fee Property Inspections
What happens during the applicant call?
- Conference call with reviewers assigned to your application
- Scheduled early in process
- Agenda one week in advance with call-in information
- Board and staff should attend
- No need to provide advance materials
- Review team identifies need for any additional information

When will we have an opportunity to provide additional information?
- Commission provides additional information request (AIR) 2-4 weeks after call with review team
- AIR due 1-3 months after AIR is received

**APPLICANT SUBMITS APPLICATION AND PAYS FEE $**
(on or before application due date)
- Commission reviews application (timing dependent upon position on review schedule)
- Applicant has call with Commission review team (1-4 months after application due date, call agenda to meet one week prior)

**APPLICANT SUBMITS INFORMATION IN RESPONSE TO AIR**
due 1-3 months after AIR is received

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

Application Due: March 31, 2022
Review: April – May (approx.)
Call: May – June (approx.)
Add’tl Info Request: June – August (approx.)

Additional Info Request Due: September – November (approx.)
When will we find out the Commission’s decision?

- Commission reviews additional documentation and makes final decision (turning dependent on Commission meeting schedule).

8 APPLICANT RECEIVES COMMISSION DECISION (~10 months after application was submitted)

Commission Decision: February 2023

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

Your Questions...
Tools in your Toolbox

What's the best place for us to get information?

Getting Ready and Registration
Pre-Application and Attachments
Application and Project Documentation
Review Process and Commission Decision

Useful Documents
Timeline and Costs

How do I use the resources?

Reference Copies:
http://www.landtrustaccreditation.org/first-time-accreditation/useful-documents

How do I know what the Commission is looking for?

Accreditation Requirements Manual
March 2021
Online Application and System

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

What kind of help is available?

HELP & RESOURCES

Video Tutorials - First-Time

First-Time Overview Video

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

Governance

1a. Establish strategic goals for implementing the mission, and then review and update them, as needed, at least once every five years

1b. Incorporate or organize according to the requirements of state law and maintain legal status

3a. The board meets a minimum of three times per year and maintains adopted minutes of each meeting

3b. Provide board members with sufficient and timely informational materials prior to each meeting to make informed decisions

Tip: Log into The Learning Center before clicking on the links.
And even more questions!

What are common problems that prevent accreditation from being awarded?

- Recordkeeping
  - Originals secure
  - Duplicate copies of irreplaceable records stored in separate location from originals
- Annual Financial Evaluation
  - Audit, review, or compilation based on total support/revenue
- Review and approval of most recent land transaction
  - Minutes from the meeting where project approved
- Project completed after pre-application submitted does not meet requirements

What are common mistakes made in meeting requirements?

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

Use the Requirements Manual to Pre-Screen

3. Monitoring or inspection reports include the following: Start list of items for each inspection report.
   a. Inspection date
   b. Property inspected
   c. Name of inspector
   d. Observations related to property's condition and conservation values
   e. Observations related to any potential conservation easement violations or conservation property ownership challenges
   f. Date report completed (Month/Year)
What if we didn’t quite meet a requirement?

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

Yes

Governance
Finance
Stewardship

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

More tips

• Look for the “and.” Did we check to make sure we provided all requested information?
  o Solicitation AND gift acknowledgement letter
  o Meeting materials AND date materials sent AND meeting minutes

• Do we have the right documentation?
  o For example, document review of insurance needs

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

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

What are the best tips to reduce documentation problems?

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

Final Tip:
You are not in this alone
Alliance Field Staff

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