FIRST-TIME HANDBOOK

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WHAT YOU NEED TO GET STARTED

In addition to reviewing the instructions in this Handbook, land trusts planning and preparing for the first-time accreditation process should download and read each of the following documents and have a copy of each readily available throughout the application process:

Requirements Manual

The Requirements Manual (revised periodically) provides, all in one manual, information on the elements the Commission evaluates for every accreditation indicator.

Application

The reference copy of the application (revised periodically) lists the information and documents that your land trust needs to provide to show it is meeting the requirements.

Addendums

If applying with related entities, also review the reference copies of the Addendum for Multiple Corporations – Basic and the Addendum for Multiple Corporations – Intermediate (as applicable). Each applicable entity must submit the required information as part of the primary applicant’s documentation in accordance with the Commission’s policy.

Every organization needs to reference these two documents. Both of these resources are attachments in this document or can be accessed on the Commission website by following the links to the left.

An addendum is only needed if your organization has a related entity (which means being legally linked to another entity). For example an LLC or supporting organization. Not sure if your organization needs this information? Contact us (before registration is best) at info@landtrustaccreditation.org

Application slots for first-time accreditation are filled via lottery (learn more about the lottery process). To be eligible for the lottery a registrant must be able to respond “yes” to our quiz (you can find this in the attachments section of this Handbook). You must be selected from the lottery to obtain an applicant slot. If you have not entered the lottery, you are not permitted to apply for first-time accreditation.

HOW TO USE THIS HANDBOOK

The First-Time Handbook is a digital document with links to resources and information. We highly recommend viewing this document from your computer so you can frequently reference the accreditation website, landtrustaccreditation.org. The Handbook goes through each of the first-time process steps. Additional information about the Commission and its policies can be found on our website.

Questions about the steps in the first-time process or issues with the Handbook should be sent to info@landtrustaccreditation.org.

Let’s get started...
The First-Time Process

1. **REGISTRATION**
2. **PRE-APPLICATION**
3. What’s happening at the Commission?
4. **APPLICANT SUBMITS APPLICATION**
5. What’s happening at the Commission? (Including Applicant Conference Call)
6. **APPLICANT SUBMITS INFORMATION IN RESPONSE TO AIR**
7. What’s happening at the Commission?
8. **APPLICANT RECEIVES COMMISSION DECISION**

Click on each of the sections to learn more about each step.
REGISTRATION

• Application slots for first-time accreditation are filled via a lottery.
• To be eligible for the lottery a registrant must be able to respond “yes” to our Are You Ready Quiz (also included in attachments section of Handbook).
• Submit $850 registration fee with registration lottery form.

HELPFUL LINKS

• Download and review Reference Application Packet for First-Time. Remember, this is just a reference copy, registration must be filled out and submitted in the Applicant Management System (AMS).
• Review First-Time Lottery General Overview webpage.
• Review Getting Ready and Registration webpage.

OVERVIEW

1 REGISTRATION

COUNTDOWN TO APPLICATION DUE DATE: ~9 TO 12 MONTHS

REGISTRATION FAQS

What is the lottery?

• The Commission has a set number of first-time application slots available each year. To be as fair as possible, land trusts submit their registration for first-time accreditation within a one-month window.
• The Commission draws names of land trusts (the lottery) to select those to submit an application that year or the following year, if more land trusts register than there are slots available.

Does our organization have to submit a letter of intent before going through the lottery process?

• Expressing intent to apply for first-time accreditation in future years is not required. However, if your organization would like to express intent, you may do so by completing a short online survey.
• The expression of intent survey is open year round.
• Each organization that completes the survey will receive a written confirmation of its intent to register for first-time accreditation that can be shared with interested parties.
• By completing the survey, your organization is assisting the Commission in allocating appropriate resources.
• Completing the letter of intent survey is not the same as entering the lottery. You will still be required to enter the lottery. This letter-of-intent does not represent a commitment on behalf of your organization or the Commission.

How will I know when the lottery is open?

• The Commission announces when the lottery will open on our website and through our e-newsletter (sign-up for our e-newsletter here).
• The Commission also sends email notice about the lottery registration period to those land trusts that have submitted a letter of intent.
• The lottery dates are announced well in advance of the opening, to allow organizations time to consider their options.

How will I know if my land trust was selected?

• Within a few weeks after closing the lottery, the Commission will notify land trusts of whether they have been selected to apply the following year.
• If your organization is not chosen for the immediate round, you are guaranteed a slot the next time that first-time application slots are available. These land trusts do not need to re-enter the lottery the next year.

How do we pay the $850 registration fee?

• The $850 registration fee is due at the time you enter the lottery and will be processed by a secure online payment system. The fee may be paid via VISA, Discover, MasterCard, or eCheck/ACH.
• The fee is nonrefundable, nontransferable.
• The $850 is separate from the application fee (which will be due at the time of application). To calculate your application fee please visit the Timeline and Costs webpage.

What if our land trust has a separate LLC; do we need to submit an application for it too?

• If your organization has a multiple corporate structure (such as an LLC or a supporting organization) then the Commission will need to make a determination of whether the organization will need to provide additional documentation. If you think your organization is legally linked to another entity, contact the Commission as early in the first-time process as possible (you can even reach out before you register). Read more about Related Entities.

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OVERVIEW
COUNTDOWN TO APPLICATION DUE DATE: ~3 MONTHS

2 PRE-APPLICATION

HELPFUL LINKS
• Download and review Reference Application Packet for First-Time. Remember, this is just a reference copy, pre-application must be filled out and submitted in the Applicant Management System (AMS).
• Review pre-application and attachments webpage.

PRE-APPLICATION FAQs
What attachments do I need to include with my pre-application?
• Your land trust’s most recent Form 990
• Accreditation Agreement
• Land Conservation Project List (LCPL)
• Schedule of Dedicated and Restricted Funds (SDRF)
• Completed Legal Defense Reserves Calculator

The complete list of attachments and more information on how to fill them out are located on the pre-application and attachments webpage. Check out video tutorials on filling out the LCPL and SDRF.

How do I know when the pre-application is due?
• All due dates relevant to your round can be found in the AMS as well as our Timeline and Costs webpage.
• Failure to submit a complete pre-application by the deadline will make your organization ineligible to submit an application. Learn more about the penalties and our catastrophe policy.

What does the Commission do with the conflicts of interest information?
• The Commission asks land trusts to identify any conflicts of interest with potential reviewers. Conflicts could be (but are not limited to):
  • Is a current employee, consultant, board member, substantial contributor or volunteer.
  • Is a former employee, consultant, board member, substantial contributor or volunteer (within the past five years).
  • Expects or is seeking to be an employee, consultant, board member, substantial contributor or volunteer (within the next two years).
  • Has a relationship with an applicant or accredited organization by virtue of proximity of interest. (For example, if accreditation applicant is in Commission member’s home town, or applicant is part of a partnership involving a Commission member.)
• The Commission ensures the review team does not have conflicted members and the conflicted parties are not part of the final decision on your application. See the Conflicts of Interest Policy for more information.

What’s happening at the Commission
You submitted your registration, paid the fee, completed your pre-application and submitted it through the AMS...now what?
1. The Commission reviews each pre-application for first-time accreditation with respect to the pre-application requirements. Land trusts are notified about eight weeks before the application due date whether their pre-application was accepted. If accepted, you will receive a list of projects (based on the LCPL you submitted with your pre-application) and targeted verification for which the Commission will need to see documentation (learn more in the Application section). Read more about the Commission Pre-Application Review and reasons a pre-application cannot be accepted.
2. The Commission calculates your fee based on the Form 990 that was submitted with your pre-application. An invoice for the fee will be sent via email and payment is required when your application is submitted. Want to get an estimate on what your fee will be? Visit our Timeline and Costs webpage.

COUNTDOWN TO APPLICATION DUE DATE: ~2 MONTHS
BACK TO TIMELINE
### APPLICATION FAQs

#### When can I start working on our application?
- You will receive an email notice that the application is unlocked in the AMS (this will be at least six months in advance of the application due date). Just remember that responses in your application must be no older than 90 days prior to submission. It is a good idea to plan to review your responses and attachments prior to submitting your application to ensure it includes the most up-to-date information.

#### What needs to be submitted in our application?
- Your completed application will be comprised of:
  - Application questionnaire
  - Application documentation
  - Project documentation
  - Targeted verification documentation

#### Do I have to notify key stakeholders about our intent to pursue renewal? How should our organization do this?
- Yes, your organization must notify key stakeholders to let them know it is applying for accreditation.
- To learn more about how to conduct a public notice and how to document the process for your application, visit the [Public Notice](#) webpage.
- The accreditation program recognizes the need for public accountability for land trusts and values comments from the stakeholders like landowners, donors and partners. These comments can provide a different perspective about the land trust and its work than the Commission may get during the application review process. Learn more about what happens to public comments.

#### What if I have a question about how to show documentation? Who or where should I go to for help?
- In the AMS you will see that your organization has been assigned a staff member who works with you for the duration of the renewal process. You can use the AMS to send messages (or reach out directly through phone or email). Remember, the staff reader of your application is there to help your organization submit the best application possible and should be seen as a resource. Simply put, we like it when you reach out!
- The Alliance maintains The Learning Center which features excellent tutorials, narratives and examples based on the requirements.

#### How do I submit our application?
- Just as you submitted your pre-application through the AMS, you will also use it to submit your application.
What’s happening at the Commission
You submitted your application, what happens now?

1. Your assigned Commission staff member and one or more volunteer commissioners form your review team. They read your application in detail. Visit the Review Process and Commission Decision webpage to learn more.

2. **Applicant Conference Call**
   At this step in the accreditation process, the review team will lead one mandatory phone call with your organization to give you the opportunity to answer questions the review team have about your application.
   - The Applicant Conference Call will be scheduled in advance at a date and time that works for all parties.
   - Your organization will receive a detailed call agenda in the AMS approximately one week prior to the scheduled call detailing the questions the review team would like to discuss.
   - Your organization is welcome and encouraged to have board members and others on the call who are familiar with the topics on the agenda and who can provide context and clarity.

3. After reviewing your application and the Applicant Conference Call it is likely your review team will need more information to clarify the written documents or the land trust may need to take corrective action to show it meets the requirements. Your organization will receive an Additional Information Request (AIR).

~2 WEEKS TO 4 MONTHS AFTER APPLICATION WAS SUBMITTED

### OVERVIEW

**APPLICANT RECEIVES ADDITIONAL INFORMATION REQUEST (AIR) AND SUBMITS RESPONSE**

**HELPFUL LINKS**

### APPLICATION FAQs

**How will I know when my AIR is ready?**
- You will get an email from AMS. The AIR typically comes anywhere from two weeks to two months after the Applicant Conference Call. You can download a .pdf version of the AIR from the AMS.

**What if I have questions about my AIR?**
- Reach out to your review staff member with any questions about the AIR. They can often provide context that will help you identify the best document(s) to provide in response to the AIR. It’s a win-win!

**Is getting an AIR common?**
- Yes, the accreditation process is built to provide opportunities for land trusts to provide additional information or take corrective action. Almost every land trust receives an AIR as part of the accreditation review process.

**When are my AIR responses due?**
- A due date for your specific AIR(s) will be issued by your review team.
What’s happening at the Commission
You submitted your response to the AIR(s), when will you find out if accreditation was awarded?

1. Your review team reads, in detail, any AIR(s) responses and related documentation. Visit the Review Process and Commission Decision webpage to learn more.

2. The Commission has only a few decision-making meetings a year. The review team will present your application to the Commission for a decision at the earliest meeting possible.

3. The Commission can make one of the following three decisions at the conclusion of the first-time process: award accreditation, postpone its decision (table), or not award accreditation. Visit the Accreditation Application Final Decisions webpage to learn more.

~10 months after application was submitted

APPLICANT RECEIVES COMMISSION DECISION

- The Commission will contact the primary accreditation contact and provide the final determination.
- Your land trust may appeal a Commission decision to not award accreditation by following the Commission’s Appeals Policy and Procedures.

HELPFUL LINKS

- Review Final Decisions webpage.

COMMISSION DECISION FAQs

Is there other paperwork I need to sign? Yes, when your land trust is accredited it will be asked to sign a License Agreement to be able to use the seal and a Summary of Findings with any expectations for improvement or notices related to your accreditation decision. 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.

How long is my accredited term?

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<th>Term</th>
<th>Description</th>
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<td>5 yrs</td>
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<tr>
<td>5 yrs</td>
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</tr>
<tr>
<td>7 yrs</td>
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</tr>
<tr>
<td>7 yrs</td>
<td>THIRD RENEWAL APPLICATION @ FIFTEEN YEARS</td>
</tr>
</tbody>
</table>
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What if my organization is thinking about a merger or undergoes a major organizational change during our accredited term? Please let us know! Email us at info@landtrustaccreditation.org, and we will be in touch to discuss any next steps. See our Compliance Confirmation Policies.
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 a land trust meets the ethical and technical guidelines for the responsible operation of a land trust set out in *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, helping to ensure the promise of perpetuity.

Accreditation has been proven to make land trusts stronger, which in turn strengthens the whole land trust community. But, accreditation also provides tangible benefits for land trusts. See the Benefits of Accreditation.

How Accreditation Works
Accreditation 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.

About the Land Trust Accreditation Commission
The Commission is an independent nonprofit and a supporting organization of the Land Trust Alliance. See About the Commission for more information. The Commission is governed by a board of diverse land conservation and nonprofit management experts from around the country who serve as commissioners.

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.

The Commission also follows best practices in accreditation.

- It has a comprehensive conflict of interest policy and manages conflicts to ensure fair and consistent decisions.
- It makes independent decisions that are not influenced by political or donor concerns.
- It maintains a help desk and instructional materials to coach land trusts through the accreditation process and how to document compliance but does not provide training or mentoring in how to meet the requirements.
- It keeps all applicant material confidential, sharing only 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.

About the Land Trust 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*. The Alliance provides training and technical assistance to help land trusts achieve and maintain accreditation. To learn more about Alliance resources pertaining to the accreditation process, please visit our Alliance Resources page.