FIRST-TIME ACCREDITATION INFORMATION SESSION
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”
Land Trust Standards and Accreditation Requirements

Your guide to how standards, practices, elements, and accreditation indicators (adopted by the Alliance) and accreditation requirements (adopted by the Commission) fit together and build strong land trusts.

12 Standards

Example

11. Conservation Easement Stewardship
Land trusts have a program of responsible stewardship for their conservation easements.

11C Conservation Easement Monitoring

11C2. Monitor each conservation easement property at least once per calendar year:
   a. If the land trust uses aerial monitoring, conduct on-the-ground monitoring at least once every five years
   b. Promptly document the annual monitoring activities for each conservation easement

2 Practice Elements

Accreditation Requirements

(Specific measures to evaluate 11C2)
1. Each conservation easement monitored once per calendar year
2. Monitoring reports include the following:
   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
3. Monitoring reports completed promptly after monitoring event
4. Monitoring methodology sufficient to identify conservation easement violations
5. If aerial monitoring conservation easements, on-the-ground monitoring occurs at least once every five years

Land Trust Accreditation Commission
Stewardship

Indicator Elements

11B3. When there are significant changes to the land or the conservation easement (such as a result of an amendment or the exercise of a permitted right), document those changes in an appropriate manner, such as through monitoring reports, a baseline supplement or current conditions reports.

11C2. Monitor each conservation easement property at least once per calendar year; (a) If the land trust uses aerial monitoring, conduct on-the-ground monitoring at least once every five years, (b) Promptly document the annual monitoring activities for each conservation easement.

11E2. Implement and comply with written procedures for documenting and responding to potential conservation easement violations.

11F3. Maintain a permanent record of all notices, approvals, denials, interpretations, and the exercise of any significant permitted rights.

11H1. Adopt and follow a written procedure addressing conservation easement amendments that is consistent with the Land Trust Amendment Principles.

12B1. Develop a written land management plan for each conservation property within 12 months after acquiring the land to: (a) Identify the conservation values, including significant cultural and/or those that have significant community value, (b) Identify and prioritize overall management goals for the property, (c) Identify activities that achieve the goals and to what extent they may be feasible, or those that raise significant threats to the conservation values, (d) Specify those that are appropriate for the property with the property’s conservation values, and the restrictions and other requirements.

12C2. Address management of the property.

Requirements

1. Conservation Easement Monitoring and Conservation Property Inspections

1. Each conservation easement monitored once per calendar year. (Monitoring shown over accredited term at renewal; shown over last three years at first-time.)

2. Each conservation property inspected once per calendar year. (Inspections shown over accredited term at renewal; shown over last three years at first-time.)

3. Monitoring or inspection reports include the following:
   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

4. Monitoring or inspection reports completed generally within three months of the monitoring or inspection date.

5. Monitoring or inspection methodology sufficient to identify conservation easement violations or conservation property ownership challenges.

6. If aerially monitoring conservation easements, on-the-ground monitoring occurs at least once every five years.
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<th>Main Accreditation Application</th>
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A Mark of Distinction

The accreditation seal AFFIRMS national quality standards are met.

☑ SOUND FINANCES
☑ ETHICAL CONDUCT
☑ RESPONSIBLE GOVERNANCE
☑ LASTING STEWARDSHIP

www.landtrustaccreditation.org
Accreditation = Strength

100% Accredited land trust average increase in ACRES CONSERVED 2005–2015

87% of accredited land trusts said accreditation motivated them to make ORGANIZATIONAL IMPROVEMENTS

107% Accredited land trust average increase in OPERATING BUDGET 2005–2015

160% Accredited land trust average increase in NUMBER OF VOLUNTEERS 2005–2015

LAND TRUST ACCREDITATION COMMISSION
Accreditation = Public Trust

ACCREDITATION & TRUST

79% of foundation and government stakeholders said accreditation factored into their organization's decision-making.

83% of landowners said accreditation increased their confidence that their land would be protected in perpetuity.

85% of public agencies and foundations said accreditation increases their confidence in land trusts.

80% of landowners said they considered accreditation when deciding to work with a land trust.

LAND TRUST ACCREDITATION COMMISSION
What can we expect during the application process?
First-Time Accreditation Process

1. REGISTRATION
   - Application slots for first-time accreditation are filled via lottery.
   - To be eligible for the lottery a registrant must be able to respond “yes” to:
     - Are you a U.S.-based 501(c)(3) tax-exempt public charity or quasi-governmental organization?
     - Have you been incorporated for at least two years?
     - Have you completed at least two direct land or easement acquisition projects?
   - Submit $850 registration fee with registration lottery form

2. PRE-APPLICATION
   - Applicant fills out and submits pre-application using the Accreditation Management System (AMS) (~3 months prior to application due date)

3. COMMISSION REVIEWS AND OFFICIALLY ACCEPTS OR DECLINES YOUR PRE-APPLICATION
   - Accepted applicant receives project selection, fee and targeted verification request (~2 months prior to application due date)

4. APPLICANT SUBMITS APPLICATION AND PAYS FEE ($ on or before application due date)
   - Commission reviews application (timing dependent upon position on review schedule)

5. APPLICANT HAS CALL WITH COMMISSION REVIEW TEAM (~1-4 months after application due date; call agenda is sent one week prior)
   - Commission provides additional information request (AIR) ~2-4 weeks after call with review team

6. APPLICANT SUBMITS INFORMATION IN RESPONSE TO AIR (due ~1-3 months after AIR is received)
   - Commission reviews additional documentation and makes final decision (timing dependent on Commission meeting schedule)

8. APPLICANT RECEIVES COMMISSION DECISION (~10 months after application was submitted)
Registration Period: June 30 – August 11, 2022
Notification: Early September 2022

Interested in Future Years? Submit a Notice of Intent

REGISTRATION

- Application slots for first-time accreditation are filled via lottery.
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  - Are you a U.S.-based 501(c)(3) tax-exempt public charity or quasi-governmental organization?
  - Have you been incorporated for at least two years?
  - Have you completed at least two direct land or easement acquisition projects?
- Submit $850 registration fee with registration lottery form
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: February 28, 2023
Pre-Application Review: March
Notification: April 2023
What are the special forms we have to complete?

Land Conservation Project List

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
</tr>
</thead>
</table>
| Date Acquired (Recorded) | Project Name | Grantor | Town, City, or County | Area | Type (DDB/HCO) | Baseline Report Date Completed (Signed) | Monitoring Dates (mm/yy) | Complete if Form B28j is South Florida 
| | | | | | | | | Enter "yes" for transactions since 2018 if transaction was at a pass-through entity of an unrelated party with an appraised value of more than $5 million the basis in the property within 12 months of the entity's acquisition and if the value of the donation was greater than $5 million. | | |
| | | | | | | | | Notes (also, if "0" or 
| | | | | | | | | "C" selected in Column 
F, please describe) |

- Start it early
- Use it (or a similar database) to keep record of your portfolio
Video Tutorials

Completing the Land Conservation Project List

The following video tutorial demonstrates how to complete the Land Conservation Project List. Having trouble viewing it? Try using the direct link.

Tips and Techniques for Completing the Land Conservation Project List

The following video tutorial offers tips and techniques for completing the Land Conservation Project List. Having trouble with the browser? Try using the direct link.
## Schedule of Dedicated and Restricted Funds

*Please see the instructions tab for a description of the contents of each column.*

<table>
<thead>
<tr>
<th>Organization Name:</th>
<th>Name</th>
<th>Date and Source of Data:</th>
<th>MM/DD/YY Document Name</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>FUND NAME AND CATEGORY</th>
<th>FUND DESCRIPTION</th>
<th>DOLLAR VALUE AND TYPE(S) OF RESTRICTIONS</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>WITHOUT DONOR RESTRICTIONS</td>
<td>WITH DONOR RESTRICTIONS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Undesignated</td>
<td>Board-designated</td>
</tr>
</tbody>
</table>

| Operating Reserves | Enter name of fund here | $0 | $0 | $0 | $0 | $0 |
| Conservation Easement Stewardship | Enter name of fund here | $0 | $0 | $0 | $0 | $0 |
| Conservation Easement Defense | Enter name of fund here | $0 | $0 | $0 | $0 | $0 |
| Fee Land Management | Enter name of fund here | $0 | $0 | $0 | $0 | $0 |
| Fee Land Defense | Enter name of fund here | $0 | $0 | $0 | $0 | $0 |
| TOTAL | | $0 | $0 | $0 | $0 | $0 |
Video Tutorials

COMPLETING THE SCHEDULE OF DEDICATED AND RESTRICTED FUNDS

ANSWERS TO FREQUENTLY ASKED QUESTIONS ABOUT THE SCHEDULE OF DEDICATED AND RESTRICTED FUNDS
What are verification statements and how much detail do we need to provide?

Click for Tips on Verification Statements

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
Your Questions...
4. 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 is sent one week prior)
- Commission provides additional information request (AIR) ~2-4 weeks after call with review team

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Example Timeline

- Application Due: June 6, 2023
- Review: June – July (approx.)
- Call: July – August (approx.)
- Add’tl Info Request: August – Sept. (approx.)
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?

6. Applicant submits information in response to AIR
   (due ~1-3 months after AIR is received)

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

7. Commission reviews additional documentation and makes final decision (timing dependent on Commission meeting schedule)

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

Commission Decision: February 2024
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)*
  – Not Award Accreditation *(with road map for how to be successful in a future application)*
Your Questions...
Tools in your Toolbox
What’s the best place to get information?
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?
Online Application and System

Governance - Questionnaire

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

General
- Questionnaire
- Attachments

Governance
- Questionnaire
- Attachments

Finance
- Questionnaire
- Attachments

Transactions
- Questionnaire
- Attachments

Governance

1. Number of board meetings in the last 12 months with quorum.
   5
2. Does your organization employ staff?
   No
3. Is your land trust in “good standing” in the state it was incorporated?
   No
4. Describe the procedures for a) recruiting board members and b) training new board members.
   5
5. Describe how the board established the strategic goals or strategic plan.
   5
6a. Date the board last reviewed strategic goals or strategic plan
   07/09/2019
6b. Did your land trust have an isolated or rare instance when it was not able to show compliance with the requirements in the Governance section in its recent work?
   No
What kind of help is available?

Video Tutorials - First-Time

We are pleased to provide the following video tutorials for first-time applicants. New tutorials will be posted soon. For general information, visit our website.

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<tr>
<td>6</td>
<td>Legal Defense Reserves Calculator</td>
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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.
LAND TRUST
Standards and Practices

STANDARD 11. CONSERVATION EASEMENT STEWARDSHIP

C. Conservation Easement Monitoring

1. Monitor each conservation easement property at least once per calendar year
   a. If the land trust uses aerial monitoring, conduct on-ground monitoring at least once every five years
   b. Promptly document the annual monitoring activities for each conservation easement

Background

A land trust should monitor its easements at least once per calendar year. Monitoring helps a land trust develop a relationship with the landowner, helps discover changes in land ownership, enables it to see if the easement is effective, helps uncover violations, saves time and money on enforcement actions, and establishes a record in case of court action. Annual monitoring routinely detects any landowner contact with the property that might indicate a violation. A land trust may visit critical elements of the property. Inspections of the property, which may include discussions with the property owner, may be needed to verify that an action is a violation. The land trust may visit critical elements of the property whenever necessary. Critical elements of the property include the easement, the easement easements, and areas with particularly sensitive or valued activities that may require monitoring.

Accretion Indicator Elements located at www.landtrustaccreditation.org

Last revised November 16, 2023

My Learning

Current Completed Submissions

Search Learning Items

11 Learning Items

Learn Practice Element 11E1: Adopt a Conservation Easement Violation Policy and Procedures
Starting

Learn Practice Element 11B3: Documenting Changes to Land or Easements
0%
Tip: Log into The Learning Center before clicking on the links.
And even more questions!
What are common problems that stop 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 must 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 to board missing contents
• Fee inspection reports missing contents
Use the *Requirements Manual* to Pre-Screen

3. Monitoring or inspection reports include the following:
   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
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 a) the circumstances, b) the alternative steps your land trust took to meet the intent of the requirement and/or mitigate risks associated with the non-compliance and c) 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.)
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)?
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 Now?

- Understand *Standards and Practices* and accreditation requirements
- Evaluate your readiness: Assessing Your Organization
- Contact Alliance field staff about help and resources
- Learn the process steps
- Create a committee to guide the process
- Look at the reference version of the application
Final Tip:
You are not in this alone
Alliance Field Staff

Our Regional Programs

Address challenges in your part of the country, with support from the land trust community.

- Mid-Atlantic
- Midwest
- New England
- New York
- Southeast
- West
How to reach us

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Final Questions