What You Can Plan For

February 2017 | Alliance Board Approves Revised Standards

March 2017 | New Standards Available Online for Download

June 2017 | Every Alliance Member Land Trust Must Pass a Resolution Adopting the Revised Standards Before Renewing Membership

Summer 2017–Spring 2019 | Alliance Educational Resources Updated and Created for Revised Standards

Winter 2020 | Update Process Complete

2017 | 2018 | 2019 | 2020

Fall 2017 | Accreditation Commission Seeks Input on Requirements Related to New Indicator Elements


Accreditation Application Updates

NO CHANGE

All applicants use existing application; first-time is paper and renewal is electronic.

To ensure all 2018 applicants have advance notice, the transition application for 2018 will be published in summer 2017.

TRANSITION YEAR

All first-time and renewal applicants use a transition application modified with deletions and an addendum.

To ensure all 2019 renewal applicants have advance notice, the new renewal application will be published in summer 2018.

NEW RENEWAL APPLICATION

Renewal applicants use new electronic application that conforms to revised Standards. First-time applications will not be accepted in this year.

To ensure all 2020 first-time applicants have advance notice, the new electronic first-time application will be published in summer 2019.

NEW FIRST TIME APPLICATION

First-time applicants use new electronic application that conforms to revised Standards. Paper application discontinued.
2019

**NEW RENEWAL APPLICATION**

Renewal applicants use new electronic application that conforms to revised Standards. First-time applications will not be accepted in this year.

To ensure all 2020 first-time applicants have advance notice, the new electronic first-time application will be published in summer 2019.

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**Current Status**

*Requirements Manual* finalized and in use by applicants

*Download:* [www.landtrustaccreditation.org/2018rm](http://www.landtrustaccreditation.org/2018rm)

*Webinar:* [www.landtrustaccreditation.org/webinar](http://www.landtrustaccreditation.org/webinar)

*Rally Session B02*

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New electronic renewal application available and used by renewal groups in 2019 onward; reference copy available

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New electronic first-time application used in 2020 onward; reference copy published summer 2019
Civicore: Application Management System

OLD vs. NEW

2019 Round 1 and 2 Applicants vs. 2019 Round 3 Applicants and beyond
Workshop Agenda

Timeline for Renewal Accreditation

Accreditation Requirements Manual
March 2018

LAND TRUST ACCREDITATION COMMISSION
An Independent program of the Land Trust Alliance

HOME

Commission Login
Username
Password
Forgot Password?
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Land Trust Login
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Password
Forgot Password?
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A Mark of Distinction
The accreditation seal and its five national quality standards are not:

- Sound Finance
- Ethical Conduct
- Responsible Governance
- Lasting Stewardship
Timeline for Renewal Accreditation

For detailed information on each process step below, visit www.landtrustaccreditation.org/renewal.

1. Applicant Submits Pre-Application*
   - about 3 months before application due date

2. Applicant Submits Application and Fee
   - on or before application due date

3. Applicant Submits Additional Information
   - due 3 months after AIR received

4. Commission Reviews the Application Materials
   - about 1–4 months after application due date

5. Commission Provides Additional Information Request (AIR)
   - about 1–4 months after application due date

6. Commission reviews additional documentation and makes final decision
   - timing depends on when Commission meets next

7. Applicant Receives Commission Decision
   - about 10 months after application submitted

* Applicant Receives Log-in and Registers within 2 mos. of pre-application due date
Registration Email

Starting the Conversation
To help you start the renewal conversation in your land trust you can download and share our Benefits of Accreditation fact sheet. We also have a brief PowerPoint and companion script for your board to use when discussing the value and benefits of renewal. For more detailed information, you can download an hour-long PowerPoint with audio that describes the renewal process.

Access the Online Renewal System
The renewal application is electronic. Use the link below to access the online system ONLY FOR THE FIRST TIME ACCESS; you will be directed to the "My Profile" page where you must create a password for future access to your renewal application. Access the complete user guide here.

Link for First-Time Access
http://landtrust.civicrm.org/index.php?section=myProfile&action=condition&autologinKey=cf4fe6a8560bf738a2422a909f6f4b3c811e095c0c679cbe255e76215ed0fa514441813e

The link above is for first-time access only. Please bookmark and visit https://landtrust.civicrm.org/index.php for future login using the primary contact’s email address and the password created on first use.

Registration is the First Step
Registration is now open for your application renewal. Registration confirms your organization’s intent to renew, provides your current contact information, and identifies any related corporations that will be part of your application. Registration is the first step in the online system. Once you complete the registration section and submit the $750 fee you can access the rest of the online application. Registration closes on 10/15/2012; early registration provides you more time to explore the online system. Failure to register by 10/15/2012 will result in the expiration of your organization’s accreditation on Not Accredited.
Registration

Registration Questionnaire

Related Corporations

* Will your land trust be applying as a single corporation or with multiple, related corporate entities?

- Single Corporation
- Multiple Corporate Entities

Applicants that operate with or are linked to additional corporations are encouraged to contact the Commission information about the related entities. If your organization has more than one corporation, governing authority determination about the level of application information required. The Commission may require an addendum: Commission prior to the submittal of the pre-application to determine what additional application requirements time of registration, additional fees may apply. The Commission reserves the right, depending on what the review, to not accept a renewal application based on the applicant’s failure to supply required information. For Multiple Corporate Structures or Corporate Combinations.

Renewal Application Registration Terms of Agreement

Renewal Registrant Agreements

By submitting this registration form our organization agrees to the following:

- **Understanding Program Requirements**: That a representative of our organization has read and is responsible for accreditation, including the following Commission publications:
  - The Commission’s website
  - The Applicant Handbook
  - Requirements Manual
  - The applicable Accreditation Fee Fact sheet

- **Application Contents**: That our organization will use the online system to submit a complete application:
  - A completed renewal application questionnaire
  - Documentation of how our organization addressed any expectation(s) for improvement issued at accreditation
  - Evidence that our organization complied with each of the indicator practices throughout its accredited documents:
    - The renewal application and required attachments
    - The project documentation indicated on the Renewal Project Documentation Checklist
    - Information provided on the Renewal Land Conservation Project List

- **Land Trust Accreditation Commission Agreements**: Land Trust Accreditation Commission Agreement. Commission agrees to follow its published policies and procedures, including its confidentiality policy.

* I agree to the Registration Terms of Agreement

☐
## Pre-Application

### General - Questionnaire

Click on a category listed below to begin working in that section. Red categories have not been started, yellow categories have been started but are not yet complete, and green categories are complete.

<table>
<thead>
<tr>
<th>General</th>
<th>Questionnaire</th>
<th>Attachments</th>
<th>Related Entities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governance</td>
<td>Questionnaire</td>
<td>Attachments</td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td>Questionnaire</td>
<td>Attachments</td>
<td></td>
</tr>
<tr>
<td>Stewardship</td>
<td>Questionnaire</td>
<td>Attachments</td>
<td></td>
</tr>
</tbody>
</table>

### 1. Overview of Land Conservation Activities

- **a. Number of conservation easements now held**
  - Number of conservation easement: 5

- **b. Number of acres protected with conservation easements now held by your land trust**
  - Acres: 10

- **c. Number of conservation fee properties now owned**
  - Number of conservation fee properties: 10

- **d. Number of acres now owned in fee for conservation purposes by your land trust**
  - Acres: 10

- **e. Does your Land Conservation Project List indicate that there are gaps in your annual conservation easement**
  - Yes

### 2. Land Trust Overview

- **a. Number of board members**
  - Members: 10

- **b. Number of full-time staff**
  - Staff: 10

- **c. Number of part-time staff**
  - Staff: 10
Application

Click on a category listed below to begin working in that section. Red categories have not been started, yellow categories have been started but are not yet complete, and green categories are complete.

Your application is 2% complete

General
- Questionnaire
- Attachments

Governance
- Questionnaire
- Attachments

Finance
- Questionnaire
- Attachments

Transactions
- Questionnaire
- Attachments

Stewardship
- Questionnaire
- Attachments
# Required and Triggered Attachments

<table>
<thead>
<tr>
<th>Trigger Field</th>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required Attachment</td>
<td>T1</td>
<td>Project Selection Criteria</td>
</tr>
</tbody>
</table>
| Transactions Q2     | T3     | *Since your land trust has purchased land or a conservation easement over the accredited term, for the most recent purchase or bargain sale conservation easement or conservation fee property transaction:*  
1. Independent appraisal (or letter of opinion) used to substantiate the purchase price  
2. Purchase price documentation *(such as purchase and sale agreement, engagement letter, closing statement)* |
| Transactions Q4     | T5     | *Since your land trust uses a conservation easement template.* Conservation easement template |
| Transactions Q5     | T8     | *Since your land trust completed projects where a landowner took a tax deduction over the accredited term.* Template for written donor notification of tax code requirements *(or most recent example)* along with statement of when the notification is typically provided |
| Required Attachment | T7     | Statement describing your land trust’s recordkeeping practices including:  
1. How originals (paper or electronic) are kept in a secure manner *(such as in a locked cabinet with limited access, in an archive facility with permission needed for access)*  
2. How originals (paper or electronic) are protected from damage or loss *(such as in a fireproof safe, a bank vault, an archive facility with sprinklers)*  
3. How originals and copies are stored in a way so both are not destroyed in a single calamity *(such as paper originals and duplicates being stored in separate locations, electronic duplicates being backed up on a remote server or the cloud)* |
# Selected Projects

## General Documents

Click on a category listed below to begin working in that section. Red categories have not been started, yellow categories have been started but are not yet complete, and green categories are complete.

<table>
<thead>
<tr>
<th>Sub-Category</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Documents</td>
<td></td>
</tr>
<tr>
<td>Transactions</td>
<td></td>
</tr>
<tr>
<td>Stewardship</td>
<td></td>
</tr>
</tbody>
</table>

## Required Attachments

Showing 5 record(s).

<table>
<thead>
<tr>
<th>Sub-Category</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Description</td>
<td>A statement with a brief description of</td>
<td>The project, including the project name, size, type of transaction, date of acquisition, the role of any partners, and any other information that will help the reviewer understand the project.</td>
</tr>
<tr>
<td>Map</td>
<td>Map or aerial photo of project area</td>
<td>If not included in other project documentation.</td>
</tr>
<tr>
<td>Co-hold Agreement</td>
<td>If co-held with another entity, any</td>
<td>These agreements would include any mitigation agreements.</td>
</tr>
<tr>
<td>Mitigation Agreement(s)</td>
<td>If a mitigation project, any mitigation</td>
<td></td>
</tr>
<tr>
<td>Non-compliance</td>
<td>If your land trust was not able to show</td>
<td>This explanation would include the circumstances, the alternative steps your land trust took to meet the intent of the practice and mitigate risks associated with the non-compliance, and how your land trust typically complies with the requirement.</td>
</tr>
</tbody>
</table>

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**LAND TRUST ACCREDITATION COMMISSION**
Verification Documents

Verification Item: Rally Title (Targeted)

Transactions Documents

Click on a category listed below to begin working in that section. Red categories have not been started, yellow categories have been started but are not yet complete, and green categories are complete.

Transactions Documents

<table>
<thead>
<tr>
<th>Number</th>
<th>Type of Verification Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Targeted</td>
</tr>
</tbody>
</table>

Targeted Item Name: Rally Title

Targeted Verification Item Type: Evidence of Title Investigation

Required Attachments

Showing 3 record(s).

<table>
<thead>
<tr>
<th>Sub-Category</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Due Diligence</td>
<td>Title Investigation Evidence</td>
<td>Evidence of title investigation</td>
</tr>
<tr>
<td>Project Due Diligence</td>
<td>Evidence the title investigation was updated prior to closing</td>
<td>If the title investigation was completed early in the transaction process, provide evidence the title investigation was updated prior to closing by a title company or attorney.</td>
</tr>
</tbody>
</table>
| Project Due Diligence | Documentation that shows how encumbrances | Documentation that shows how encumbrances that could impact the project were addressed, such as:
- Lien or mortgage subordinations or discharges
- Mineral remoteness reports
- Statement describing how the land trust assessed any exceptions for the investigation of mineral rights and assessed the risk that the minerals were potentially severed
- Other documentation (such as water rights due diligence report, memo to file with analysis of how substantial access easements or rights-of-way could impact project) |

Provide Additional Documentation
General Tips and Pointers

• **Questionnaires:**
  – Can complete in more than one sitting
  – Can revise at any time prior to submitting final application

• **Attachments:**
  – Upload only final versions of documents (scan as needed)
  – Use universal file types (.pdf, .doc, .xls, etc.)
  – File names should be no more than 200 characters
  – Up to 100MB per file
<table>
<thead>
<tr>
<th>Requirement</th>
<th>AIR Request</th>
</tr>
</thead>
</table>
| Meeting minutes or other records document conflicted party absent for the vote. | Form 990 Does Not Match Audit (significantly) MODIFY FOR OTHER ERRORS (B)  
The Commission would like to verify that the organization's financial information reported on the Form 990 reconciles with the audited financial statements. Differences were noted in reported revenue, expenses, and total assets.  
a. Please provide a statement explaining the difference between the audited financial statements and the Form 990.  
b. If the information contained on the 20XX Form 990 is in error, provide a policy or procedure that describes how the organization will ensure that its Form 990 is complete and accurate in the future.  
[Alternative (b) if egregious: If the information contained on the 20XX Form 990 is in error, provide a compliant Form 990.] |
| Debt or lease payment obligations generally can be met. | Form 990 Does Not Match Audit (significantly) MODIFY FOR OTHER ERRORS (B)  
The Commission would like to verify that the organization's financial information reported on the Form 990 reconciles with the audited financial statements. Differences were noted in reported revenue, expenses, and total assets.  
a. Please provide a statement explaining the difference between the audited financial statements and the Form 990.  
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