Overview
The Land Trust Accreditation Commission held its winter meeting in February 2014. At this meeting, the Commission awarded renewed accreditation for the first time, a major milestone in the accreditation program’s history! The Commission greatly appreciates the commitment of accredited land trusts to the program and on February 26 will be pleased to post a list of land trusts awarded renewed accreditation on its website.

The Commission is committed to evaluation and continuous improvement and, as part of this process, during its February meeting it reviewed the design of the accreditation renewal program, findings from the first rounds of renewal applications, the accreditation renewal process, and feedback from the land trust community. Findings in each of these areas are described below.

Accreditation Renewal Design
Design and Outreach
In 2010 and 2011, a committee of eight Commission and Land Trust Alliance representatives, including five from accredited land trusts, was formed to design the renewal process. It was supported by staff from the Commission and the Alliance and advised by an accreditation consultant. The committee sought input from accredited land trusts as noted below.
• December 2010: Via an open call for comments, all accredited land trusts were asked to provide their thoughts and questions about the renewal process.
• April 2011: Two in-person discussion forums with accredited land trusts from Pennsylvania and California (states with the highest number of accredited land trusts) were facilitated by the accreditation consultant.
• June 2011: Seeking to reach all accredited land trusts, four webinars were held; more than 100 individuals participated and many completed an online survey after the webinar.
• Alliance and Commission staff discussed accreditation at numerous state and regional conferences and meetings throughout 2011.

Purpose
The Commission reviewed the following purposes for accreditation renewal and noted that land conservation is a dynamic field. As the field evolves and land trust personnel change, renewal helps ensure the ongoing integrity of an accreditation seal that landowners, agencies, funders and others can rely on. Renewal ensures that the program meets the following purposes.
• Continue to advance the goals of the accreditation program to build strong land trusts, foster public trust in land conservation, and help ensure the long term protection of land.
• Foster continued implementation of Land Trust Standards and Practices in accredited land trusts, especially as staff and board change.
• Continue to advance the practice of land conservation with accreditation requirements that reflect best practices in the field.
• Confirm that accredited land trusts continue to comply with current indicator practices and all current accreditation requirements.
• Verify that any expectations for improvement, provided to accredited land trusts at time of accreditation, were met.
• Identify and evaluate major changes in accredited land trusts’ governance, operations and programs against the accreditation requirements.

Final Renewal Design
In 2011, the renewal design committee recommended a final design of the renewal program that included the following components.
• Renewal would use an online application system.
• After confirming the five-year term of accreditation best reflected the dynamic nature of land conservation (see more below), the following decisions were made predicated on that term.
  o Renewal would assess compliance with the indicator practices and accreditation requirements with a focus on changes made within the accredited organization since accreditation was granted, rather than replicate the entire first-time accreditation process.
  o To streamline the process and reduce costs, there would be fewer review process steps.
  o Renewing land trusts would self-attest to some elements of several practices. The self-attestation approach would be coupled with a system that selects one or more self-attestation items for verification in each round.
• Renewing applicants would receive a discount on fees from the fees paid by current first-time applicants.

The Commission periodically receives inquiries about how and why the land trust accreditation term was established as a five-year period and reviewed this topic at its February 2014 meeting. The five-year term was established by an Alliance steering committee and adopted as part of the business plan approved by the Alliance when it created the program in 2005. The steering committee evaluated other voluntary accreditation programs and observed the following:
• Some programs require an annual review process (e.g., certified organic agriculture);
• Many have terms of three to seven years with five being common (e.g., park and recreation agencies); and
• At least one has a term of ten years (museums) that entails a complete re-application and review process that takes up to two years to complete.

Based on information from these voluntary accreditation programs, the land trust accreditation program was designed with a term that would allow it to focus on renewal of accreditation as described above, rather than complete re-accreditation. In addition, unlike many accreditation programs where an applicant has to complete the renewal process before its accreditation expires, land trust accreditation applicants must only submit their renewal application before the expiration of the term. This will always result in an accredited period greater than five years. The Commission knows land trusts have questions about the length of the accredited term; this is discussed further under the “Feedback” and “Next Steps” sections of this report.
Information from Early Renewal Applications

Application Status
The first 20 accredited land trusts applied for renewal in April 2013; 29 additional renewal applications were submitted in November 2013. In 2014, 41 renewal applications are expected. As of February 2014, three organizations have chosen not to pursue renewed accreditation.

Renewal Applicant Time Invested
Applicants are asked to report on the time invested by their organizations in the renewal process. Three applicants have provided this information to date, which is too small of a sample to provide meaningful data. The Commission will provide information on the time invested when it has more data to report.

Initial Renewal Findings
The information in the initial renewal applications generally confirmed the accredited land trust community’s commitment to upholding high standards and showcased important conservation work undertaken by accredited land trusts. The accredited land trusts in the renewal process have demonstrated a sincere commitment to the accreditation program. There were, however, several areas where challenges were noted as described below.

Self-Attestations
The renewal application was designed to require less documentation than first-time accreditation. This is accomplished, in part, through self-attestations of compliance, some of which are verified during the process. This “trust but verify” approach was requested by the land trust community during the renewal design process. In the first round of renewal applications, the Commission found that two-thirds of applicants accurately completed the self-attestations related to baseline documentation reports and conflict of interest policy contents. Several organizations had multiple attestations that did not prove correct once additional evidence was evaluated.

Key Elements
The majority of applicants demonstrated compliance with Key Elements of the indicator practices (as defined in the Commission’s Requirements Manual). However, about a quarter of applicants did not demonstrate consistent implementation of Key Elements over their accredited term and did not complete baseline documentation reports by closing, monitor conservation easements annually, and/or secure appraisals when purchasing land or easements.

Additional Elements
Documenting implementation of Additional Elements (such as bringing title current prior to closing, having landowner signatures or documented attempts to obtain signatures on all baselines, having evidence of mortgage subordination or discharge, etc.) was a greater challenge for some applicants. Additional Elements must be in place before renewal can be awarded, and applicants had the opportunity to demonstrate compliance through the additional information request process.

Corrective Action
Through the additional information request process, land trusts were asked to provide an average of 12 documents. There were several common areas where the Commission requested corrective
action. Three-quarters of applicants were asked to take action to bring baseline documentation reports into compliance with the requirements for practice 11B. Three-quarters were also asked to revise their landowner tax-code notification materials to conform to the requirements outlined in practice 10B. Approximately half had requests related to fee land management plans and/or needed to provide additional documentation related to board approval of conservation transactions.

Applicants were also asked to take action on other significant areas during the renewal process. Examples include the following: signing Forms 8283 with accompanying appraisals that did not accurately reflect the property interest given; not accurately classifying funds received with donor restrictions as either temporarily or permanently restricted, and having conservation easements and baseline documentation reports that were inconsistent with respect to the presence or absence of key features on the property. By addressing these areas during the renewal process, the accreditation program ensures that all accredited land trusts meet the requirements and that the public can rely on the accreditation seal.

Expectations for Improvement

“Expectations for Improvement” (EFIs) may be issued by the Commission to an accredited land trust when the Commission determines that an organization needs to do additional work to fully comply with one or more elements of an indicator practice. An applicant must be able to demonstrate at renewal that it has taken steps to address the EFIs. Many renewal applicants demonstrated that they addressed EFIs soon after accreditation was first awarded. Several had documentation showing EFIs were addressed just prior to submitting the renewal application. A few did not have documentation at the time of renewal application of how the EFIs were addressed.

Recommendations for Applicants

The Commission is pleased that the accreditation program has helped land trusts significantly advance their practices. It also noted that it will take time to create a culture of continuous improvement and compliance with the indicator practices in the land trust community. To help create this culture, accredited land trusts should be familiar with the Requirements Manual, take advantage of the educational materials provided by Alliance, and start implementing EFIs immediately after accreditation is awarded. When completing the renewal application, land trusts should accurately complete attestations. If there are questions, the Commission encourages organizations to call Commission staff or to provide additional statements in the application.

Renewal Process and Commission Decisions

The Commission discussed its experience reviewing renewal applications and made the following decisions about the process.

Review Team Call

The renewal process was designed to have fewer steps than first-time accreditation and there is no formal applicant call at renewal. Organizations may request a call with the review team. To ensure the most efficient use of volunteer commissioner time, organizations are asked to request a call with the review team within two weeks of receiving the additional information request. Otherwise, applicants are encouraged to reach out to Commission staff as often as needed.
Additional Information Request Extensions
The streamlined renewal process does not include an option for the Commission to table an applicant. The process was designed, however, to allow the Commission’s executive committee to extend the additional information request deadline for specific reasons. Applicants can ask for an extension upon receiving the additional information request, and the executive committee will review the request. Three applicants were granted an extension in the first round.

Decision Options on Renewal Applications
The Applicant Handbook outlines the decisions the Commission can make on a renewal application, including awarding renewed accreditation and not awarding renewed accreditation. The Commission’s policies and procedures also allow the use of an internal designation of probation when an accredited land trust needs to take specific actions within a specific timeframe during its accredited term in order to remain accredited. (See the Commission’s compliance confirmation and disciplinary action policy and procedures for more information.) This is akin to the concept of “conditional accreditation” used by some voluntary accreditation programs.

The Commission noted that, in these early years of the accreditation program, conditional accreditation allows the Commission greater flexibility to recognize the strong work of accredited land trusts while at the same time identifying discrete, resolvable actions an organization can take early in its renewed term to maintain its accredited status. The conditional status reflects the accreditation program’s philosophy of continuous improvement and allows the organization to be recognized as accredited while ensuring that all accredited land trusts meet the same requirements. The conditional status is internal to the Commission, and the designation is removed when the organization completes the specific action(s) required by the Commission.

Land Trust Community Feedback
The Commission is committed to operating an accreditation program that is reflective of the land trust community; it takes all feedback seriously and has routinely adapted the program in response. Recent feedback about renewal is summarized below. The “Next Steps” section has more on providing feedback and the Commission’s plans for continued program evaluation.

Costs of Renewal/Term of Accreditation
Some renewal applicants and land trust service centers have raised questions about the cost of renewal. The Commission takes these concerns seriously and spent considerable time discussing them at its February meeting. Concerns about costs are related to several areas.

- The first is the opportunity cost of renewal, with the disruption in organizational work plans every five years and the result that conservation work may have to be deferred.
- Second, there are concerns about the costs of complying with Land Trust Standards and Practices and program requirements.
- A third area of consideration is the need for more information about the benefits a land trust receives as long as it maintains its accreditation.
- A fourth concern noted by some applicants is the amount of the accreditation renewal fee.

These concerns are generally expressed while noting that the accreditation program should continue to be operated with a rigor that ensures all accredited land trusts meet requirements for an accreditation seal the public can trust.
Online Application System
The Commission asked applicants for feedback on the online application system and has received many comments about challenges using the system. Commission staff have addressed the concerns as they arise, within the limitations of the custom-built system. The third edition of the online application User Manual will be completed by the end of February 2014. As a result, subsequent applicants should experience fewer problems.

Finding Information
The Commission will also make important changes to its website this year to respond to feedback and to present information in a way that is more user-friendly. The Commission also operates a help-desk and has staff available during business hours to assist applicants.

Next Steps
The Commission and Alliance have a shared goal of a land trust accreditation renewal program that confirms accredited land trusts meet quality standards to foster public trust in land conservation and to ensure long-term land protection and that is simultaneously achievable for land trusts. The Commission and Alliance boards had important discussions about this goal at their respective meetings in February 2014.

As noted in the above report, the Commission discussed the concerns expressed by land trusts about the cost of accreditation renewal as well as the challenges with Land Trust Standards and Practices implementation evidenced in the renewal applications. It recognized that accreditation is relatively new and that the land trust community is still developing a culture of continuous improvement and compliance with the requirements. The 19 commissioners (more than half of whom are staff from accredited land trusts), with the support of the Alliance board, developed a multi-part strategy to gather and evaluate information to inform future program improvements.

Continuous Improvement
Over the last eight years, the Commission has demonstrated its commitment to continuous improvement and has regularly adapted the accreditation requirements and application materials based on feedback from the land trust community and experience from commissioners. The Commission has worked with the Alliance, which establishes the indicator practices, twice since the program’s inception to reduce the number of indicator practices. Commissioners look forward to this next phase of evaluating information from renewal applications, applicants, and the land trust community and continuing to adapt the accreditation program accordingly.

Gathering Data from Land Trusts and Renewal Applications
Over the next several months, the Commission will gather information from organizations that have recently been awarded renewed accreditation and that are current renewal applicants to better understand the costs of renewal, how applicants prepared for renewal, challenges they encountered, and the benefits of renewal. It will also gather information about these topics from land trust leaders at the Alliance’s Leadership Council meeting in May, via calls with service centers throughout the year, and at a special feedback session at Rally. Commissioners from accredited land trusts will also provide valuable information as their organizations proceed through the process.
The Commission will also continue to collect data from renewal applications about compliance with the accreditation requirements, accuracy of application attestations, and areas where the renewal process helps avoid risks to conservation land, donors and the integrity of the accreditation seal. Data from the first round of renewal applications is summarized above; data from the second round of renewal applications will be reviewed in late summer 2014.

**Evaluating Data and Making Changes**

The Commission will evaluate the feedback and data and make program adjustments along the way at a time and in a manner that reflects the complexity of the issues and that provides reasonable notice to land trusts. Some improvements are already underway or planned for 2014, including a revised User Manual for the online renewal system, improving how information is presented on the Commission’s website and completing the annual spring update of the Commission’s *Requirements Manual*.

The feedback and data will also help inform whether any longer-term adjustments to the accreditation application or requirements need to be made. During this period of evaluation, the Commission and Alliance will also consider whether changes to indicator practices are warranted and whether, once accreditation is an established practice in the land trust community, there should be adjustments in the term of accreditation. The Commission looks forward to working with land trusts as it continues to refine the program to be reflective of our community and extends its sincere thanks to all the accredited land trusts and those applying for accreditation for their commitment to the program.