

How to Complete the Land Conservation Project List

Overview: Every land trust applying for accreditation must provide a Land Conservation Project List (LCPL) that includes specific information on **all** of the land trust's conservation easements and conservation fee properties held at the time of pre-application.

How the Commission uses information on your LCPL:

- **To select** the projects for which the land trust will provide project documentation and targeted verification items as part of a complete application
- **To confirm** that your land trust meets the following requirements, as described in the *Requirements Manual*:
 - That each conservation easement has a baseline documentation report
 - That each conservation easement has a record of annual monitoring
 - That each conservation fee property has a management plan
 - That each conservation fee property has a record of annual inspections

Please note:

- Within the LCPL Excel file there are separate worksheets for conservation easements (look for the tab labeled "CE List") and conservation fee properties (look for the tab labeled "Fee List").
- Make sure to include the name of your land trust and the date the LCPL was completed at the top of each relevant worksheet in the highlighted space provided.
- Be sure to enter the correct number of monitoring and inspection dates based on your application status (three years for first-time, five years for renewal, seven years for extended term).
- Be sure to submit the LCPL as an Excel document, as this helps the reviewers evaluate your information (please do not submit as a PDF file).
- *If your land trust elects to not use the Commission's LCPL template*, it is responsible for ensuring it provides an Excel document that contains the same information requested in the LCPL template.

Special Note — No Land or Conservation Easements Currently Held

In the rare event your land trust does not hold any conservation fee properties or conservation easements at the time of pre-application, please contact the Commission. If your land trust is a first-time applicant, the Commission will need to confirm you are eligible to apply, and your land trust will need to submit a modified LCPL, available upon request from the Commission. If your land trust is a renewal applicant, the Commission will determine on a case-by-case basis if a modified LCPL is necessary.

QUICK LINKS

- [How to Complete the Conservation Easement Sheet](#)
- [How to Complete the Conservation Fee Property Sheet](#)
- [LCPL FAQs](#)

How to Complete the Conservation Easement Sheet

What to List: All conservation easements held by your land trust

- The worksheet is set up for entering one entry for each conservation easement document (regardless of how many landowners are covered by the easement).
- Alternatively, you can list your land trust's easements using the method required for Terrafirma (<https://terrafirma.org/info/counting>). If you select this option, please indicate so at the top of the worksheet or in a separate attachment.
- For conservation easements co-held with another entity, use Column F (see below) to indicate a co-hold and make any notes in Notes column.

What NOT to List:

- Agreements (such as term easements, trail agreements, restrictive covenants, etc.) that were not created according to or covered by the state's conservation easement enabling law.
- Easements for which your land trust is simply granted a third-party right of enforcement or property management.

Conservation Easement Spreadsheet Column Details:

Column	How The Commission Uses the Information
Column A: Date conservation easement was acquired/recorded; must be reported as (mm/dd/yyyy) <i>Date recorded, not date signed.</i>	To compare to the baseline documentation report date of completion and easement monitoring dates
Column B: Name of conservation easement project*	To identify the project for the land trust when it is a selected project (or targeted verification item)
Column C: Grantor from whom the conservation easement was acquired*	To identify the project for the land trust when it is a selected project (or targeted verification item)
Column D: Town, City, or County (and state if operating in more than one state) where the property is located	To identify the project for the land trust when it is a selected project (or targeted verification item)
Column E: Total acreage of the conservation easement-restricted area (can be rounded to the nearest whole number)	To identify the project for the land trust when it is a selected project (or targeted verification item)

Column	How The Commission Uses the Information
Column F: How the conservation easement was acquired Use the following letters: • Donation (D) • Purchase (P) • Bargain sale (B) • Mitigation/regulatory requirement (M) • Co-hold (C) • Other (O) <i>such as transferred from another land trust</i> • For (O) or (C), provide details in Notes column.	To identify the types of projects a land trust is primarily engaged in and facilitate project selection (or targeted verification item)
Column G: Date baseline documentation report was signed; must be reported as (mm/dd/yyyy) • Enter the date of the last signature. If the report has been updated or amended, include those date(s) in Notes column.	To verify that all easements have baseline documentation reports; to verify that recent easements of a first-time applicant have baselines completed at or prior to closing; to verify that renewal applicants have baselines completed at or prior to closing for any easements acquired during the accredited term
Column H: Check if a Form 8283 was signed by the land trust for this project in the last five years at first-time or over the accredited term at renewal	To facilitate project selection (or targeted verification)
Column I: Monitoring dates; use (mm/yy) or (mm/dd/yy)^ • For first-time applicants, month/year for the last 3 years: green columns only • For renewal applicants, month/year for the last 5 years or since accreditation was last awarded: green and blue columns only • For extended term applicants, month/year for the last 7 years or since accreditation was last awarded: all seven columns (green, blue, and orange) ^It is <u>not</u> acceptable to only provide the year.	To verify that all easements demonstrate annual monitoring

Column	How The Commission Uses the Information
Column J: Explanatory notes, if any, such as: • Date of updated baseline report or completion of current conditions report, as applicable • Identify projects that were accepted from another organization (see FAQ for details on what to report) • Explanation of “O” or “C” in Column F	To facilitate project selection and assist with verification of compliance

** If a landowner has asked for anonymity, you may list the project name and/or grantor as “anonymous” on the LCPL. If you have several anonymous landowners, please make sure to distinguish among them by the name of the town, date of acquisition, etc. The Commission may request documentation for projects even if they are listed as anonymous. All documents provided are covered by the Commission’s Confidentiality Policy.*

How to Complete the Conservation Fee Property Sheet

What to List

- Conservation fee properties are defined as fee land acquired for conservation purposes. If land is acquired for its conservation values, it should be listed even if held for transfer or sale with or without a conservation easement. If your land trust does not plan to be the long-term holder of a property, explain in the Notes column.
- Also use the Notes column to indicate:
 - If the landowner retains a life estate. Note: a management plan is not required until the land trust receives the remainder interest.
 - If your land trust holds only a partial interest in a conservation property, use Column F (see below) to indicate a co-hold and make any notes in Notes column (including percent ownership).
- If your land trust holds multiple conservation fee parcels that are managed as one property that are covered by one management plan and inspected as one property, see the example below for guidance on completing the LCPL. Include the following:
 - Property (or preserve) name, location, total acreage of the preserve, date of original management plan (see instructions below), and inspection dates for the property.
 - In the Notes column list the number of parcels and range of years of the acquisitions (year of first acquisition to the most recent acquisition)
 - Add a separate row for each parcel acquired in the last five years (or in the last seven years for extended term applicants).
 - Include the following for each parcel: date acquired, parcel name, grantor, location, acres, type of acquisition, if any Form 8283.
 - Highlight those rows that make up an entry for one property with multiple parcels. Note the date of management plan update for each parcel acquisition in the Notes column.

A	B	C	D	E	F	G	H	I								J
Date Acquired (Recorded)	Property or Preserve Name	Grantor	Town, City, or County	Acres	Type (D/P/B/ M/C/O)	Date of Management Plan	Form 8283 (check if in last 5 years or over accredited term)	Inspection Dates (mm/yy)								Notes (also, if "O" selected in Column F, please describe)
								Extended Term (7 Years)								
								Renewal (5 years)								
								First-Time (3 Years)								
								most recent year completed	year prior	two years prior	three years prior	four years prior	five years prior	six years prior		
	Town Preserve	Various	Greentown	600.00		1/2/2000		11/25	10/24	9/23	9/22	10/21		15 parcels acquired between 1990-2025; all covered by the same management plan and inspected at the same time as one preserve including the Jones Parcel and Brown Pond that were acquired in the accredited term		
2/15/2023	Jones Parcel	Bob Jones	Greentown	15.00	B		x							Management plan updated 1/15/2024		
6/30/2025	Brown Pond	Susie Brown	Greentown	5.00	D		x							Management plan updated 10/15/2024		

- If the Commission selects a multiple-parcel project area, it will specify which parcel(s).

What NOT to List

- Property that your land trust manages but does not hold the fee interest.
- Non-conservation fee properties (property that has no conservation value and was acquired solely to generate revenue).

Column	How The Commission Uses the Information
Column A: Date (most recent) property was acquired; must be reported as (mm/dd/yyyy) <i>Date recorded.</i>	To compare the management plan date of completion and inspection dates
Column B: Name of property*	To identify the project for the land trust when it is a selected project (or targeted verification item)
Column C: Grantor from whom the property was acquired*	To identify the project for the land trust when it is a selected project (or targeted verification item)
Column D: Town, City, or County (and state if operating in more than one state) where the property is located	To identify the project for the land trust when it is a selected project (or targeted verification item)
Column E: Total acreage of the property (can be rounded to the nearest whole number)	To identify the project for the land trust when it is a selected project (or targeted verification item)
Column F: How the property was acquired Use the following letters: • Donation (D) • Purchase (P) • Bargain sale (B) • Mitigation/regulatory requirement (M) • Co-hold (C) or partial interest • Other (O) <i>such as transferred from another land trust</i> • For (O) or (C), provide details in Notes column.	To identify the types of projects a land trust is primarily engaged in and facilitate project selection
Column G: Date original management plan was completed; use (mm/yy) or (mm/dd/yy)^ <i>If date of original management plan is unknown,</i>	To verify that all conservation fee properties have management plans; to verify that recent acquisitions of a first-time applicant have management plans completed within 12 months

Column	How The Commission Uses the Information
<i>list date of most recent update and indicate that it is an update in Notes column</i> <i>^It is <u>not</u> acceptable to only provide the year.</i>	after closing; to verify that renewal applicants have management plans within 12 months after closing for acquisitions during the accredited term
Column H: Check if a Form 8283 was signed by the land trust for this project in the last five years at first-time or over the accredited term at renewal.	To facilitate project selection (or targeted verification item)
Column I: Inspection dates; use (mm/yy) or (mm/dd/yy)^ - For first-time applicants, month/year for the last 3 years: green columns only - For renewal applicants, month/year for the last 5 years or since accreditation was last awarded: green and blue columns only - For extended term applicants, month/year for the last 7 years or since accreditation was last awarded: all seven columns (green, blue, and orange) <i>^It is <u>not</u> acceptable to only provide the year.</i>	To verify that all conservation fee properties demonstrate annual inspections
Column J: Explanatory notes, if any, such as: - Date of most recent updated management plan - Explanation of "O" in Column F - Identify projects that were accepted from another organization - Indication of whether property is intended for resale or transfer - Identify co-owner/percent ownership "C" - Identify if property is encumbered by a conservation easement held by another entity	To facilitate project selection and assist with verification of compliance

LAND TRUST ACCREDITATION COMMISSION

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FAQs about the LCPL

General Questions

Do I need to update the LCPL to report projects completed since the LCPL was submitted in the pre-application?

- No, you do not need to provide an updated LCPL in the main application if the only update is more recently completed projects.
- The main application includes a prompt to submit a corrected LCPL if the version previously submitted in the pre-application needs to be corrected.
- A corrected LCPL should be provided if the land trust has additional information (such as monitoring/inspection dates, baseline documentation reports or management plan completion dates) that might help confirm compliance with requirements or if the land trust now holds a different type of project (such as the land trust accepted its first conservation fee property).

What does the “accredited term” mean?

- A land trust’s first accredited term begins as of the date specified in the accreditation summary of findings and license agreement.
- Subsequent terms begin as of the date specified in the renewal summary of findings.

Questions about Dates

What date range do I need to report on the LCPL for annual monitoring and inspections?

- Start with the most recent year completed and enter the prior years as applicable for your application status (*two years prior for first-time, four years prior for renewal, six years prior for extended term*).

What if my database includes the full date for the monitoring/inspection visits (mm/dd/yyyy)?

- It is acceptable to enter the full date if you maintain the information in that format.
- The LCPL entries must include at least the month and year – providing just the year is not sufficient.

What if my land trust missed one or more annual monitoring/inspection visits?

- Leave the field blank for any missed visits.
- You can also provide an explanation for any missed visits in the pre-application.

What date should I enter for “Baseline Report (Date Signed)”?

- Enter the date of the last signature.

What date should I enter for easements or properties transferred from another land trust?

- Enter the date you received the transferred easement or property in Column A, Date Acquired.
- Use the Notes column to specify that it was transferred and include the original date of acquisition there.

Special Circumstances

What if my land trust holds both the conservation easement and fee interest on the property?

- If your land trust holds both interests, then list the project under both the easement tab and fee tab and make a note in the Notes column.

What if my land trust has façade easements?

- If your land trust holds a façade easement on a historical structure, that does not need to be listed as a conservation easement. However, please list any conservation easements that also include façade easement elements.

How do I report conservation easements that are phased with each phase adding land through an amendment?

- For phased easements, include the date of the most recent amended and restated easement in the date acquired field and indicate the date the baseline documentation report was updated to include the phased easement.
- In the Notes column, indicate phase X of Y phases. If phased easements do not result in one amended and restated easement document, then list each phase separately.