

# FIRST-TIME HANDBOOK

## 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.



### First-Time Reference Application Packet

The [reference copy of the first-time application](#) (revised periodically) lists the information and documents that your land trust needs to provide to show it meets the requirements.

**Every land trust needs to reference these two documents, the *Requirements Manual* and the *First-Time Reference Application Packet*.**



**SPECIAL NOTE:** If your land trust has a related entity (for example, an LLC or a supporting organization), then the Commission will need to determine whether and what additional documentation will need to be provided in accordance with the Commission's policy. Review the reference copies of the Addendum for Multiple Corporations – Basic and the Addendum for Multiple Corporations – Intermediate (as applicable) to preview that documentation; these addendums can be found in the *First-Time Reference Application Packet*. An addendum is **only** needed if your land trust has a related entity (which means being legally linked to another entity). **Not sure if your land trust needs this information? Contact us (before registration is best) at [info@landtrustaccreditation.org](mailto:info@landtrustaccreditation.org).**

## 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](http://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](mailto:info@landtrustaccreditation.org).

# The First-Time Process

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Let's get started...

# 1 REGISTRATION

## Overview

- 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.
- You will need to submit \$850 registration fee with registration lottery form.

## Helpful Links:

- [First-Time Lottery](#)
- [Evaluate if your land trust is ready](#)
- [Get Started with Accreditation](#)
- [First-Time Fees and Due Dates](#)

## Registration FAQs

### Q: 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.
- The Commission announces the lottery opening dates via the website and through our e-newsletter. It's a good idea to [sign-up for the e-newsletter to stay informed](#).

### Q: Does our land trust 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 land trust would like to express intent, you may do so by [completing a short online survey](#) (this form is open year-round).
- Each land trust 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.
- 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 land trust or the Commission.

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

- If your land trust 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 land trust 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](#)

## 2

## PRE-APPLICATION

### Overview

- The pre-application requires basic information about your land trust and its activities as well as required attachments.
- Data from the pre-application is used by the Commission to select projects and targeted verification items for which the applicant will need to submit detailed documentation with its application.
- The pre-application is due approximately four months before the complete application is due.

- You will receive an email with access to the online pre-application about two months before it is due.

### Helpful Links

- [First-Time Pre-Application](#)
- [First-Time Accreditation Agreement](#)
- [Land Conservation Project List \(LCPL\) Toolkit](#)
- [Schedule of Dedicated and Restricted Funds \(SDRF\) Toolkit](#)
- [Legal Defense Reserves Calculator](#)

### Pre-Application FAQs

#### Q: What attachments do I need to include with my pre-application?

- Your land trust's most recent Form 990
- First-Time Accreditation Agreement
- LCPL
- 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 webpage.

#### Q: How do I know when the pre-application is due for our land trust?

- All due dates relevant to your round can be found in the Accreditation Management System (AMS) as well as being posted on our website. Application Due Dates
- Failure to submit a complete application by the deadline will make your land trust ineligible to submit an application. Learn more about the Penalties and the Catastrophe Policy.

#### Q: Is there guidance for how to notify community members and partners that our land trust is going through the accreditation process?

- Review: [Public Notice Toolkit](#)

Evidence the public has been notified is part of the application process, so your land trust should start planning for this step now.

# 3

## At the Commission: Reviewing your land trust's pre-application

You submitted your registration, paid the \$850 registration fee, completed your pre-application and submitted it through the AMS...now what?

→ Review: [Pre-Application Review Process and Next Steps](#)

### Pre-Application Purpose

The Commission uses the information submitted in the pre-application to:

- **Confirm** that a land trust meets specific requirements before the land trust is allowed to proceed and submit a complete application.
- **Select** projects and targeted verification items for which the land trust will need to submit detailed documentation as part of the application.
- **Evaluate** whether the land trust meets the funding requirements for easement stewardship and defense and/or for fee land management and if more action as part of the application is needed.
- **Land trusts are notified about eight weeks before the application due date** whether their pre-application was accepted and what projects and targeted verification items will need additional documentation.

### Application Fee

- 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?

Review: [Accreditation Fees](#)

## 4 APPLICATION

### Overview

- The accreditation application is how you show your land trust is meeting the Standards and accreditation requirements.
- You will need to submit the application on or before due date.
- The application fee is due on or before the due date.

### Helpful Links

- [First-Time Application](#)
- [First-Time Board Resolution](#)
- [Application Questionnaire](#)
- [Targeted Verification Items and Selected Projects](#)
- [Accreditation Due Dates](#)
- [Accreditation Fees](#)

### Application FAQs

#### **Q: When can our land trust 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).
- 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.

#### **Q: What needs to be submitted in our land trust's application?**

Your land trust's completed application will be comprised of:

- Application questionnaire
- Application documentation
- Project documentation
- Targeted verification documentation
- Board Resolution
- Evidence of the public notice
- Remittance of application fee

#### **Q: What if our land trust has questions about showing documentation? Who or where do we go for help?**

- In the AMS you will see that your land trust 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 land trust 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 Resource Center](#) which features excellent tutorials, narratives and examples based on the requirements.

## 5

### At the Commission: After your land trust submits its application

A review team of a Commission staff member and one or more commissioners reviews each complete accreditation application in detail. The majority of information evaluated by the review team is from the applicant; additional information may be provided by the public and still other information may be the result of research conducted by the Commission's review team.

→ Review: [After Your Submission](#)

#### Applicant Conference Call *(2 weeks to 4 months after application was submitted)*



- After your application is submitted, your review team (made up of a commission staff review and volunteer commissioner(s)) host a conference call with your land trust for an opportunity to answer questions the review team may have about your application.
- While the review team may have questions related to a particular practice, it does not necessarily mean that your land trust needs to provide additional information or take further action! In some cases, only verbal clarification is needed.

→ Review: [Applicant Conference Call](#)

#### Post Applicant Conference Call

- 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 land trust will receive an Additional Information Request (AIR), see the next section in the handbook for more AIR guidance.

## 6 APPLICANT RECEIVES ADDITIONAL INFORMATION REQUEST (AIR) AND SUBMITS RESPONSE

### Overview

- Your land trust will have ~1 to 3 months to provide documentation for any AIR(s) that are issued.
- Responses to AIRS will be submitted through the AMS.

### Helpful Links

- [Additional Information Request](#)
- [Compiled Accreditation Policies](#)

### AIR FAQs

#### Q: 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 process.

#### Q: How will I know when my AIR is ready for my land trust to review?

- You will get an email from the AMS. The AIR typically comes anywhere from two weeks to three months after the Applicant Conference Call. You can download a .pdf version of the AIR from the AMS.

#### Q: What if my land trust has questions about our AIR?

- Reach out to your review staff member (remember, you can message them in the AMS, call or email with them) 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!

#### Q: When is our AIR Response Due?

- Applicants will generally be provided with one to three months to respond to the AIR. A due date for your specific AIR(s) will be issued by your review team.

## 7 At the Commission: Post AIR(s) response

The Commission makes final decisions on each complete application based on the review team's evaluation. It can be hard to wait to hear from the Commission! It's good to remember that decisions are made according to an internal schedule – and it can be up to 10 months from the time of application before you receive a decision.

→ [Review Compiled Accreditation Policies](#)

## 8

# APPLICANT RECEIVES COMMISSION DECISION

## Overview

- 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

- [Appeals Policy](#)
- [When to Contact the Commission For Accredited Land Trusts](#)
- [Renewal Overview](#)

## Commission Decision FAQs

### Q: Is there paperwork my land trust needs 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 land trust meets national standards.

### Q: How long is my accredited term?

- A first-time accredited term is five years. After 15 years of being continuously accredited, a land trust is eligible for an extended term of seven years. [Learn more about the Extended Term.](#)

### Q: What if my land trust is thinking about a merger or undergoes a major organizational change during our accredited term?

- Please contact the Commission  
Review: [When to Contact the Commission](#)