

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 all conservation fee properties still held at the time of 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 determine** whether your organization meets the minimum stewardship and defense funding requirements for accreditation, as described in the Requirements Manual, and
- **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 been annually inspected

Please note:

- Within the LCPL Excel file there are separate worksheets for First-Time applicants and Renewal Applicants (look at the tabs along the bottom of the excel spreadsheet)
- Within the LCPL Excel file there are separate worksheets for conservation easements (look for the tab labeled CEList) and conservation properties (look for the tab labeled FeeList).
- Make sure to include the name of your organization and the date the LCPL was completed at the top of each relevant worksheet in the space provided.
- IF your land trust elects to not use the Commission's LCPL template, it is responsible for ensuring that it provides an Excel document that contains the same information requested in the LCPL template.

Special Note — *No Land or Conservation Easements Currently Held (RARE)* If your organization does not currently hold any conservation fee properties or conservation easements but meets the eligibility requirements for accreditation because it has been in the chain of title on at least two projects, you need to complete a modified LCPL, available upon request from the Commission.

How to Complete the Conservation Easement Sheet

What to List:

 **All easements held by your organization (see “Do Not List” section for exceptions).**

- You can list your easements in one of two ways (please note on a cover page or in the notes column the method selected):
 - One entry for each conservation easement document (regardless of how many landowners are covered by the easement).
 - Use the method required for TerraFirma (<https://terrafirma.org/info/counting>).
- For phased easements please 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, please indicate phase X of Y phases. If phased easements do not result in one amended and restated easement document, then list each phase separately.
- Conservation easements co-held with another entity: use Column F (see below) to indicate a co-hold and make any notes in Notes column.
- If the land trust holds both easement and fee title, list the project under both the easement tab and fee tab.

What NOT to List:

- Agreements (such as trail agreements, restrictive covenants, etc.) that were not created according to the state’s conservation easement enabling law.
- Easements for which you are simply granted a third-party right of enforcement or property management.
- Façade easements (However, please list any conservation easements that also includes façade easement elements.)

Conservation Easement Spreadsheet Column Details:

Column	How The Commission Uses the Information
Column A: Date conservation easement was acquired/recorded (mm/dd/yyyy).	To compare to the baseline documentation report date of completion and easement monitoring dates and help verify compliance
Column B: Name of conservation easement project*	To identify the project for the land trust when it is a selected project (or additional 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 additional 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 additional 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 additional verification item)
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) or other (O). <i>Use multiple letters if the project involved multiple types of transactions. For (O), provide details in Notes column.</i>	To identify the types of projects a land trust is primarily engaged in and facilitate project selection (or additional verification item)
Column G: Date baseline documentation report was completed (mm/dd/yyyy). <i>If the report has been updated or amended, include date(s) in Notes column.</i>	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: Monitoring inspection dates (mm/yy) (For first-time applicants, month/year for the last 3 years; for renewal applicants, month/year for the last 5 years or since accreditation was last awarded.)	To verify that all easements demonstrate annual monitoring as described in the <i>Requirements Manual</i>
Column I: Check if a Form 8283 was signed by the land trust for this project in the last five years (e.g., original transaction, amendment)	To facilitate project selection (or additional verification)

Column J: Enter yes if, in 2016 or later, transaction was a) with a pass-through entity of unrelated parties with an appraised value more than 2.5 times the basis in the property within 36 months of the entity's acquisition and b) the value of the donation was greater than \$1 million. <i>If the land trust participated in such transactions after 2016, contact the Commission before registering to discuss the extent of the land trust's participation. Additional documentation may be required by the Commission.</i>	To facilitate project selection (or additional verification)
Column K: If yes to Column J, enter the amount of the appraised fair market value reported on the Form 8283 (Part I.5c)	To facilitate project selection (or additional verification)
Column L: Explanatory notes, if any, such as: • Date of updated baseline report or completion of current conditions report, as applicable • Explanation of any exceptions to annual monitoring • Identify projects that were accepted from another organization • Explanation of "O" 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 that we can 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.*

How to Complete the Conservation Fee Property Sheet

What to List

- Include all conservation fee properties your organization holds, including all properties that are being held for transfer or sale but are still owned by your organization. If your organization does not plan to be the long-term holder of these properties, note in Notes column.
- Conservation fee properties can be listed in the aggregate as preserves, or as individual parcels. Please note on a cover page or in the "Notes" column the method selected.
- If the land trust holds multiple conservation fee properties that are managed as one preserve with one management plan and monitored as one preserve complete the following: (See example below)
 - project area or preserve, location, total acreage of the preserve, date of original management plan, and monitoring dates for preserve
 - in Notes column list the number of parcels and years of acquisition
 - for parcel acquisitions added to the preserve in the last five years complete the following: date acquired, property name, grantor, location, acres, type of acquisition, if donated complete the appropriate fields regarding Form 8283. Highlight those rows that make up an entry for one preserve with multiple parcels. Note the date of management plan update for each parcel acquisition in the notes field

A	B	C	D	E	F	G	H					I	J	K	L
							Inspection Dates (mm/yy)					Complete if Form 8283			
Date Acquired	Property or Preserve Name	Grantor	Town, City, or County	Acres	Type (D/B/P/ M/O/C)	Date of Management Plan	most recent year completed	year prior	two years prior	three years prior	four years prior	Form 8283 (check if over term)	Completed with a pass-through entity of unrelated parties?	If yes to column "J," enter appraised FMV	Notes
	Town Preserve	Various	Greentown	600.00		1/2/2000	5/19	6/18	4/17	1/16	5/15				15 parcels acquired between 1990-2020; all covered by the same management plan and monitored at the same time as one preserve including Jones Parcel and Brown Pond that were acquired in the accredited term
1/2/2019	Jones Parcel	Bob Jones	Greentown	15.00	B							X	N		Management plan updated 1/2020
6/2/2020	Brown Pond	Susie Brown	Greentown	5.00	D							X	N		Management plan updated 8/2020

- If the Commission selects a multiple-parcel project area, it will specify what parcel(s) have been selected for review.
- If the land trust holds only partial interest in a conservation property, list the property on the LCPL and in the notes indicate percent ownership.
- If the land trust holds both easement and fee title, list the project under both the easement tab and fee tab.

Column	How The Commission Uses the Information
Column A: Date (most recent) property was acquired (mm/dd/yyyy)	To compare the management plan date of completion and inspection/monitoring dates and help verify compliance
Column B: Name of property*	To identify the project for the land trust when it is a selected project (or additional 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 additional 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 additional 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 additional verification item)
Column F: How the property was acquired. Use the following letters: donation (D), purchase (P), bargain sale (B), mitigation/regulatory requirement (M) or other (O). For (O), provide details in Notes Column. <i>Use multiple letters if project involved multiple types of transactions.</i>	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 (mm/dd/yyyy) <i>If date of original management plan is unknown, list date of most recent update and indicate that it is an update under Notes column)</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 after closing; to verify that renewal applicants have management plans within 12 months after closing for any conservation fee title acquisitions during the accredited term
Column H: Inspection dates (mm/yy) (For first-time applicants, month/year for the last 3 years; for renewal applicants, month/year for the last 5 years or since accreditation was last awarded.)	To verify that all conservation fee properties demonstrate annual inspections as described in the <i>Requirements Manual</i>

Column I: Check if a Form 8283 was signed by the land trust for this project in the last five years (e.g., original transaction, amendment)	To facilitate project selection (or additional verification item)
Column J: Enter yes if, in 2016 or later, transaction was a) with a pass-through entity of unrelated parties with an appraised value more than 2.5 times the basis in the property within 36 months of the entity's acquisition and b) the value of the donation was greater than \$1 million. <i>If the land trust participated in such transactions after 2016, contact the Commission before registering to discuss the extent of the land trust's participation. Additional documentation may be required by the Commission.</i>	To facilitate project selection (or additional verification item)
Column K: If yes to Column J, enter the amount of the appraised fair market value reported on the Form 8283 (Part I.5c)	To facilitate project selection (or additional verification item)
Column L: 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, transfer or is the location of the organization's office	To facilitate project selection and assist with verification of compliance

** If a landowner has asked for anonymity you may list the property name and/or grantor as "anonymous" on the LCPL. If you have several anonymous landowners, please make sure that we can 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.*