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The Commission awards the accreditation seal to land conservation organizations that meet national standards for excellence, uphold the public trust and ensure that conservation efforts are permanent.

Guidance Document

Indicator Practice 11C. Easement Monitoring

The Land Trust Accreditation Commission occasionally publishes Guidance Documents to help applicants interpret specific indicator practices drawn from Land Trust Standards and Practices. These documents may be amended from time to time. Guidance Documents are intended as just that – guidance for applicants. They complement information provided by the Land Trust Alliance on how to implement the practices that can be found at <http://learningcenter.lta.org>.

Elements of the Practice

The Land Trust Accreditation Commission will evaluate applicant land trusts to see if they are meeting each of the elements of this practice.

- The applicant monitors its easements at least annually.
- The applicant documents its annual monitoring activities in writing for each easement.

Annual Monitoring

The Commission will look for the following with respect to annual monitoring.

- Evidence the land trust has a pattern of monitoring each easement annually.
- If this a new practice for a land trust, the Commission will look for a minimum of the last two consecutive monitoring inspections being roughly one year apart. If an accredited land trust submits an application for renewal of its accredited status, the Commission will look for a record of annual monitoring throughout the accreditation term.
- If there is an isolated and rare gap in monitoring an easement annually, or gaps due to deliberate variations for seasons, the Commission will review any explanation of the circumstances resulting in the gaps in monitoring and also consider the land trust's monitoring history in its evaluation of this practice.

Indicator Practice 11C. Easement Monitoring

The land trust monitors its easement properties regularly, at least annually, in a manner appropriate to the size and restrictions of each property, and keeps documentation (such as reports, updated photographs and maps) of each monitoring activity.

Excerpted from Land Trust Standards and Practices

- If a conservation easement is on a property that is owned in fee by a public agency or a conservation organization, the Commission will still look for a record of annual monitoring.
- If the applicant shares its monitoring responsibilities with, or delegates them to, another entity (such as a public agency, a co-holder, or other partner) the Commission will look for the applicant to have documentation of its own annual monitoring or to provide evidence of the annual monitoring inspections conducted by the other entity.
- If the applicant closed on an easement at the end of the year, the Commission will look to see that the easement was monitored the following year. For example, if an easement closed in December the Commission would expect to see the first monitoring visit sometime by the end of the following year.

Definition of Conservation Easement Monitoring

Conservation easement monitoring is defined by the Commission as annual documented visual inspection of a conservation easement-protected property to ensure that the terms of the easement are being upheld, with on-the-ground physical inspections as the site warrants.

Documenting Monitoring

The land trust must maintain written, annual documentation of the condition of the property, even if the land trust drives or walks by, or otherwise inspects the property on a regular basis. The Commission may accredit an organization that uses basic written monitoring reports if the reports meet the minimum contents outlined below. It may also provide the land trust with expectations that future monitoring reports include additional desired contents. If an accredited land trust submits an application for renewal of its accredited status, the Commission will evaluate the land trust's progress toward enhancing its monitoring reports at that time.

Monitoring Report – Minimum Contents

At a minimum, a monitoring report should include the items below.

- Identification of the specific easement being monitored.
- The date of the inspection.
- The printed name and signature of the monitor.
- Observations relative to the restrictions, reserved rights, and conservation values recorded during the inspection.

Monitoring Report – Desirable Contents

A desirable monitoring report would also include the items below.

- A description of the area that was observed during the inspection (such as the entire property, eastern boundaries and south road, etc.).

- Information that helps substantiate the monitor's observations (including substantiation of "no change observed").
- Observation of the conditions and context of the inspection, such as
 - weather or ground conditions;
 - routes of travel;
 - means of travel (e.g., on foot, by car, etc.).
- A notation of any photos taken, their location and the identity of the photographer.
- Affiliation and address of the monitor.
- A notation of the presence or absence of the landowner or other party.
- Other desired elements recommended in Land Trust Alliance publications.

For more information

Visit the Land Trust Alliance's complete online resource, The Learning Center, <http://learningcenter.lta.org> for more information on implementing these practices. See especially the Alliance course "Conservation Easement Stewardship."

Visit www.landtrustaccreditation.org or call 518-587-3143 for more information on the accreditation program.