

# Standards and Practices

Practice 12C2 is an accreditation indicator element. Watch for an update to this narrative in early 2018 after the Commission finalizes the accreditation requirements.

## STANDARD 12

### C. Inspecting Land Trust Properties

- 2. Inspect properties at least once per calendar year for potential management problems and promptly document the inspection

#### THE IMPORTANCE OF INSPECTING FEE-OWNED LAND

A land trust that holds property also takes on a responsibility to the public and has certain legal liabilities for injuries that occur on the land. Thus, at a minimum, a land trust needs to inspect each property at least annually to ensure it is not damaged by malicious or negligent acts, that people are not endangered by safety hazards and that continuous encroachment or unauthorized uses do not cause the land trust to lose the property or parts of it altogether. Such problems usually can be prevented if the land trust marks and maintains its boundaries (see Practice 12C1) and regularly inspects its properties.

#### INSPECTION POLICY AND PROCEDURES

Each land trust should have a policy or procedures for inspection of conservation properties. This document should identify who is responsible for the inspection, the frequency of inspection and procedures for completing and processing the inspection report, including actions to be taken in case the land trust discovers any management or other problems. The policy or procedure should also describe the desired contents of property inspection reports, which should be completed soon

after the inspection visit and filed according to the land trust's recordkeeping policy (see Practice 9G).

### **Who Should Conduct Inspections?**

Land trusts should determine who is responsible for property inspections and supervision. A member of the land trust's stewardship committee, a volunteer or a staff person can conduct the inspection. This person should be:

- Thoroughly familiar with the property information, management plan and yearly work plan
- Committed to upholding the land trust's stewardship policies
- Physically fit and comfortable working alone or in small teams in remote natural areas (or whatever conditions exist)
- Trained to recognize change, trespass or encroachment and possible management improvements on the property or acquisition opportunities on adjacent lands
- Trained in proper safety procedures

If volunteers or consultants conduct a portion of the inspection, they should be properly trained, and their work should be reviewed by the person responsible for supervision. It is also helpful to have written expectations and a step-by-step guide as to what should be done and how to handle problems that arise. On properties where there is extensive public use, an inspector should be coached on how to interact with and educate visitors about inappropriate uses. Often inappropriate uses can be best corrected by someone with a friendly, nonthreatening demeanor. However, an inspector should be briefed as to when it may or may not be appropriate to intercede.

Many land trusts use site stewards to perform or assist with inspection activities. The stewards are often land trust members who live close to the site and can visit the property frequently. If this strategy is used by the land trust, clear guidance should be provided relative to the stewards' responsibilities and limits. For example, the Society for the Protection of New Hampshire Forests has a Land Steward program that specifies the qualifications, responsibilities and benefits of performing stewardship, including inspection, reporting vandalism, maintaining gates and signs and related tasks. Stewards receive a complimentary Forest Society membership and tuition reimbursement for required training, as well as the opportunity to "get to know a beautiful piece of open space intimately, in all seasons."

Ideally, inspections should be conducted with two or more persons, for safety reasons. At a minimum, one other person in the organization should be informed when an inspection is to take place. Inspectors should bring a cell phone or two-way radio and have the number of someone to call in case of emergency.

### **How Often Should Properties Be Inspected?**

A land trust must inspect its properties regularly — at least once per calendar year and often more frequently. Properties open to the public or adjacent to densely populated areas may require daily or weekly inspection or even an on-site presence by the land trust. In other situations, such as when timber harvesting is occurring on adjacent land, the land trust may need to check the property several times a week during the logging operation. Because each property is unique, the frequency of monitoring will vary. Some land trusts determine how often and include this information in the management plan. If a property is being inspected more than once a year, it may make sense to designate one site visit as the formal annual inspection, with a full review of the entire property and documentation of the condition of the land and infrastructure. Other site reviews could then focus on the status of specific issues or resources, and documentation could be limited to those items. Some land trusts inspect at least quarterly so that they can cover seasonal activities.

### **What Should the Inspection Include?**

A property inspection involves:

- Looking for threats to conservation values
- Observations related to the property's condition and conservation values
- Checking boundaries
- Noting trespass and associated problems
- Noting numbers, dates and types of visitor use
- Checking the condition of structures or hazards
- Observing uses of adjacent property
- Being attentive to the inspector's personal safety

Land trusts may need to monitor important biological features for certain plant species or communities, as required by the management plan. Photo documentation of biological features or heavy use areas may be necessary to assess impacts of human usage over time. Photo locations should be carefully documented, and photos should be dated, labeled and signed and stored according to the land trust's recordkeeping policy.

Large properties pose a special challenge to monitors because it could take weeks to travel the boundaries by foot to check for natural or manmade changes and unauthorized use. In such cases, land trusts may concentrate their surveillance to areas with more intense use, a history of problems or ready access from neighboring lands.

Inspection of working lands can include observation of the health of crops, insect and pest problems, soil erosion, drainage issues, weed pressure and related factors. If livestock is part of the operation, condition of fencing and amount of grazing available are of interest. On irrigated lands, observation of water supply and soil moisture are important. Forest inspection can include volume of timber available for harvest, fuel load, pest problems and other resource issues. At the end of the season, the land trust will likely benefit by obtaining production information on crop yields, animal-grazing days, timber logging or other income-producing harvests.

### **How Should the Inspection Be Documented?**

A form or checklist makes it easier for land trust personnel to inspect the site and generate a report with a format that is consistent over time. A land trust should have a standard form that contains at least the following elements:

- The inspection date
- The name of the property inspected
- Name of the inspector
- Observations related to the property's condition and conservation values
- Observations related to any potential property ownership challenges

The form may be customized to the needs and resources of specific properties and to their respective management plans, as long as the form includes the elements described above. For example, a property with an endangered plant species may have indicators of the species' health included on the form for that property.

The written inspection reports, combined with the management plan, can help the land trust develop the following year's work plan and budget for the property. Inspectors should indicate what future actions should be taken on the property and provide suggestions about their implementation. Inspection reports should be dated and signed by the person who inspected the property (or, at a minimum, include that person's name) and should be completed soon after the inspection visit. Items that require immediate action, such as the removal of a safety hazard, should be flagged and promptly discussed with the person who manages conservation fee land inspections and ultimately the board, if appropriate. Upon completion, the reports should be reviewed by appropriate land trust personnel and filed according to the land trust's recordkeeping policy.