

# **Baseline Documentation & Management Plans for Conservation Lands: Using a Rhode Island Protocol**

*Scott Ruhren  
Director of Conservation  
Audubon Society of Rhode Island*



# Conservation Stewardship Collaborative (CSC) Challenge



Develop a protocol for inventorying, monitoring and managing natural resources on conservation lands

What is the CSC?  
(more later)

# Protocol Rationale?

- There is no uniform protocol for inventorying and monitoring the plant, animal and ecosystem resources on RI conservation land
- For conservation easements, the IRS requires that a land trust maintain “documentation sufficient to establish the condition of the property at the time of the gift”
- Baseline documentation reports (BDRs) provide useful information for ongoing stewardship and design of management plans

# Underlying motivation?

Remembering why we are here...



# Protecting Rhode Island's Habitats



# Conservation Strategies

- Inventory natural features and develop management plans
- Steward properties appropriately
- Acquire new land and easements near other protected land and significant habitats
- Working toward Land Trust Alliance standards and practices

# This Protocol – What it is...

- Synthesis of practices, feedback, meetings, complaints etc.
- Hybridization of other agencies, online resources, papers, books etc.
- Guidelines and suggested practices
- Beginning of a conversation



# Feedback and Concerns



How can I deal with, find out about...

- Invasives?
- Misuse of resources?
- Knowledge base?
- Rules and regs.?
- Land records and plans?
- Access to experts?



# This Protocol – What it is *not...*

- Regulatory
- Replacement for useful practices

# Overall Goals (NOT mutually exclusive!)

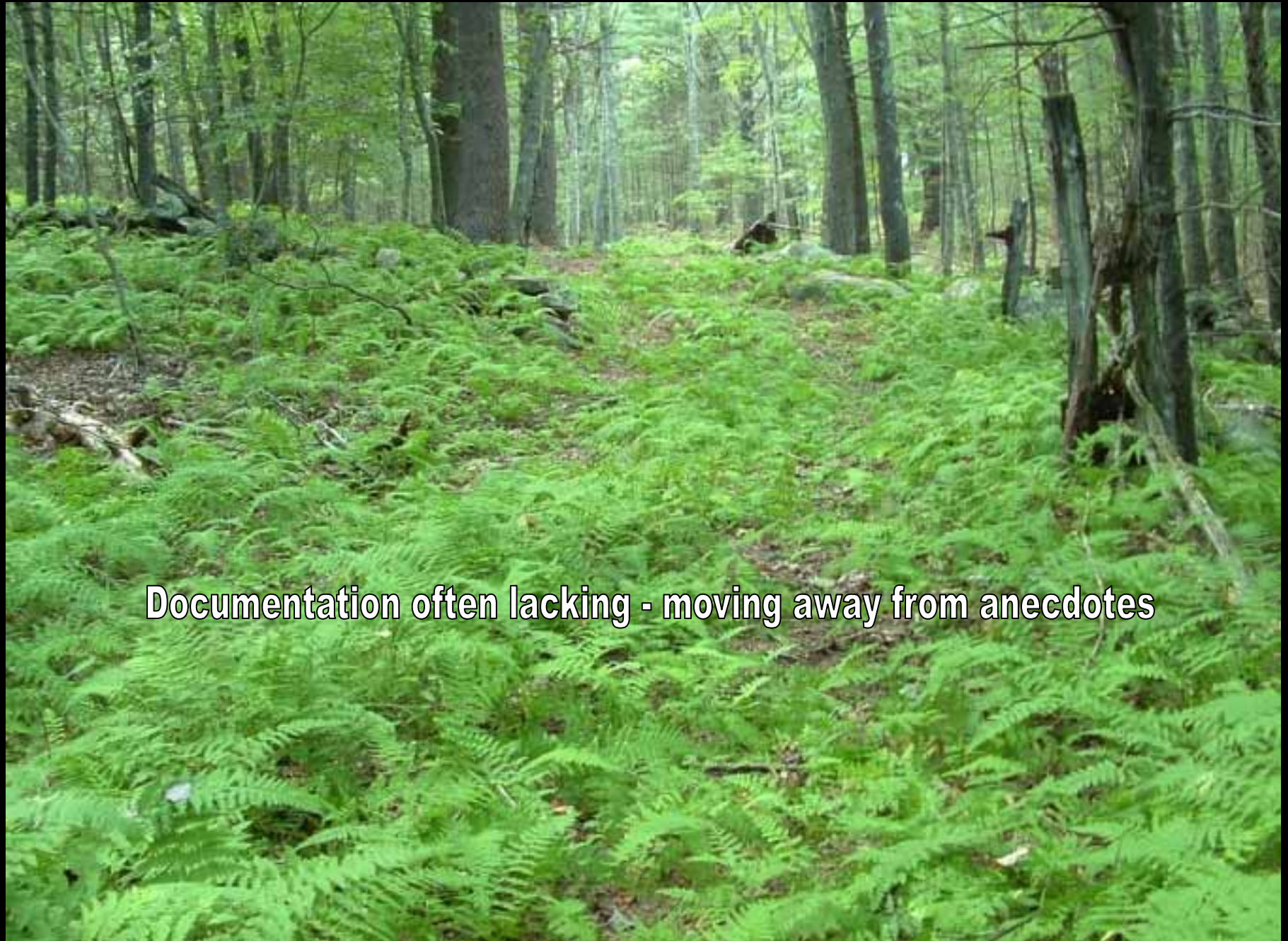
- Conducting land resource inventories
- Preparing baseline reports
- Preparing management plans

# Inventorying



- Basis for baseline document reports (BDRs)





**Documentation often lacking - moving away from anecdotes**

# Baseline Strategies

- Identify goals
- Focus on high priority areas
- Evaluate water resources
- Identify rare species
- Identify other species of interest
- Develop long-term plans



# The more information documented the better

- A safe place to start...

# Habitat types and amount





# Forest, shrubland, grassland, wetland?



A photograph of a wetland area. In the foreground, there is a pond with several lily pads floating on the water. The water is dark blue and reflects the sky. The middle ground is filled with tall, green and brown grasses. In the background, there is a dense forest of green trees under a blue sky with some clouds. The text "Conservation values?" and "Special features?" is overlaid on the image in white, bold, sans-serif font.

**Conservation values?**  
**Special features?**

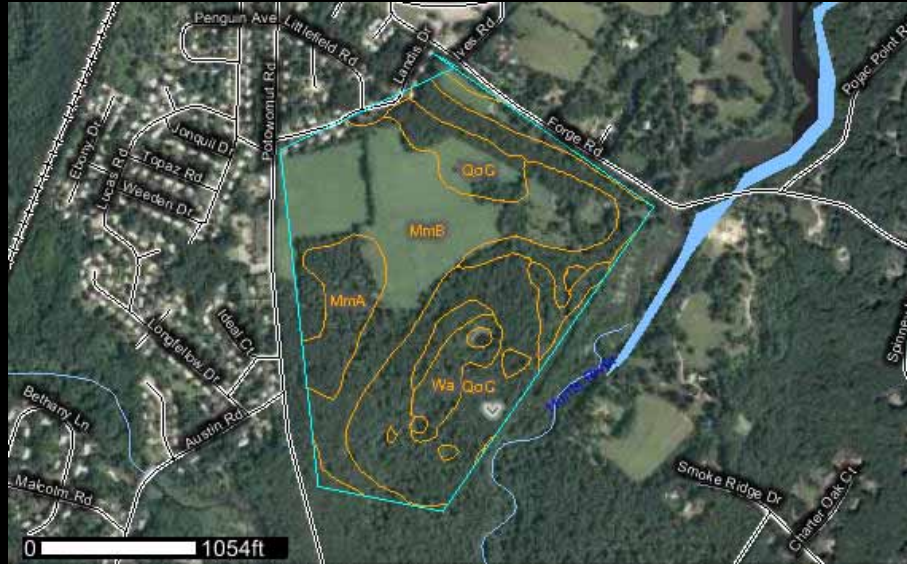


# The knowledge base... how do YOU proceed?

- Good, better, best sources?
- Funding?
- Skills within your groups and community?

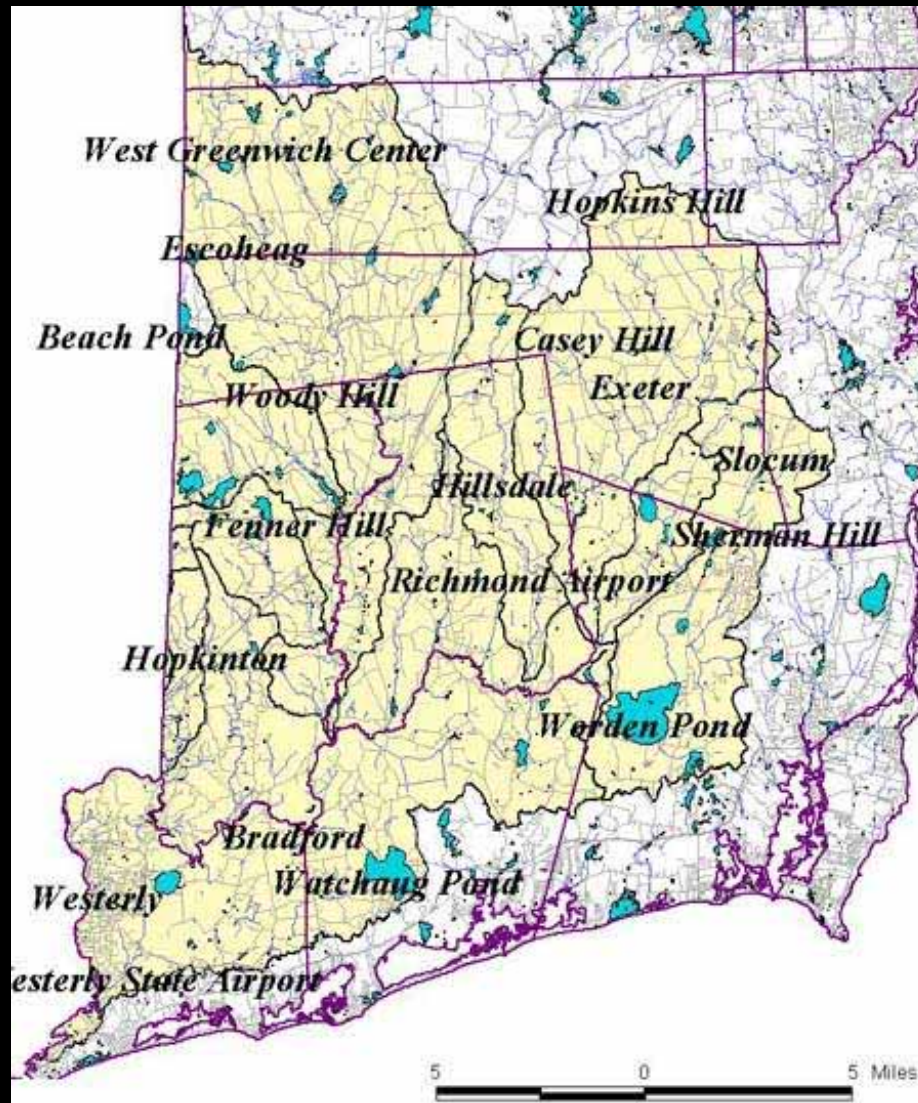


# Soils?



- Influences and influenced by vegetation, human activities etc.
- Typically included in BDRs
- One example resource: [//websoilsurvey...](http://websoilsurvey...)

# Consider the context





# Hazard Assessment





The Rule: “documentation sufficient to establish the condition of the property at the time of the gift”



“documentation sufficient to establish the condition of the property at the time of the gift”



- If you do not know where you've been or where you're going how can you know when you've arrived?



A photograph of a lush green field with a stone wall and trees in the background under a cloudy sky. The field is filled with tall grasses and some flowering plants. A low stone wall runs across the middle ground. In the background, there is a dense line of trees. The sky is blue with scattered white clouds. The entire image is framed by a thick black border.

**Present condition sets the standard for future**

# Inventorying

- Challenges?
- Following standards?
- What is enough information?
- Where do you get the information?

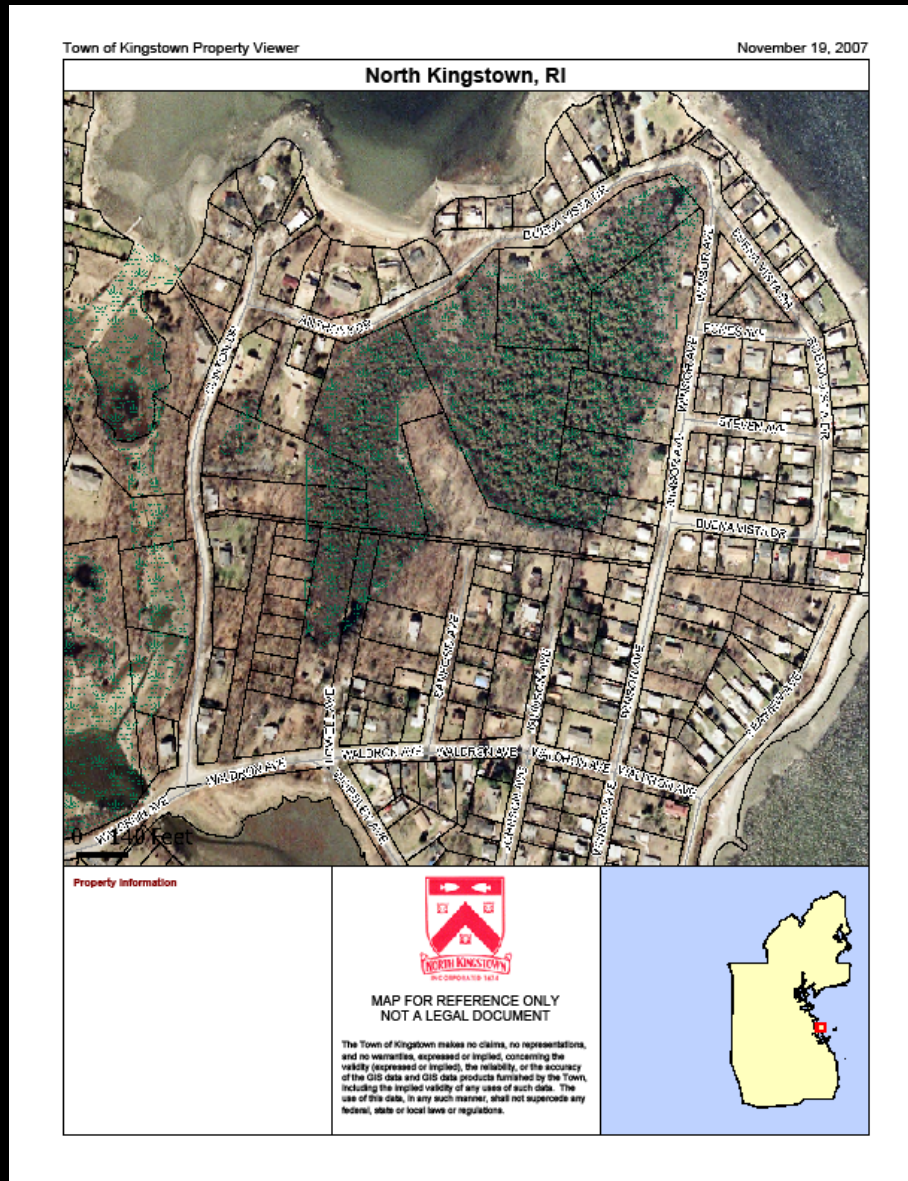


# Do the research





# Case Study: Land Protection (CE)



# BDR Miscellany

- Backup agreements?
- Buildings and other manmade structures?
- Reasonable points of access for you?
- Public access and use?
- Exercise of reserved rights?



# After the BDR

- What do you do for the next 100 years?

# Monitoring Resources



**Changes, additions...**



Now it is time to protect,  
manage, maintain and  
enhance the relevant  
resources that you have  
documented





# Meeting Everyday Challenges

- Unauthorized activities









# Meeting Everyday Challenges

- ATVs





# Meeting Everyday Challenges

- Invasive species

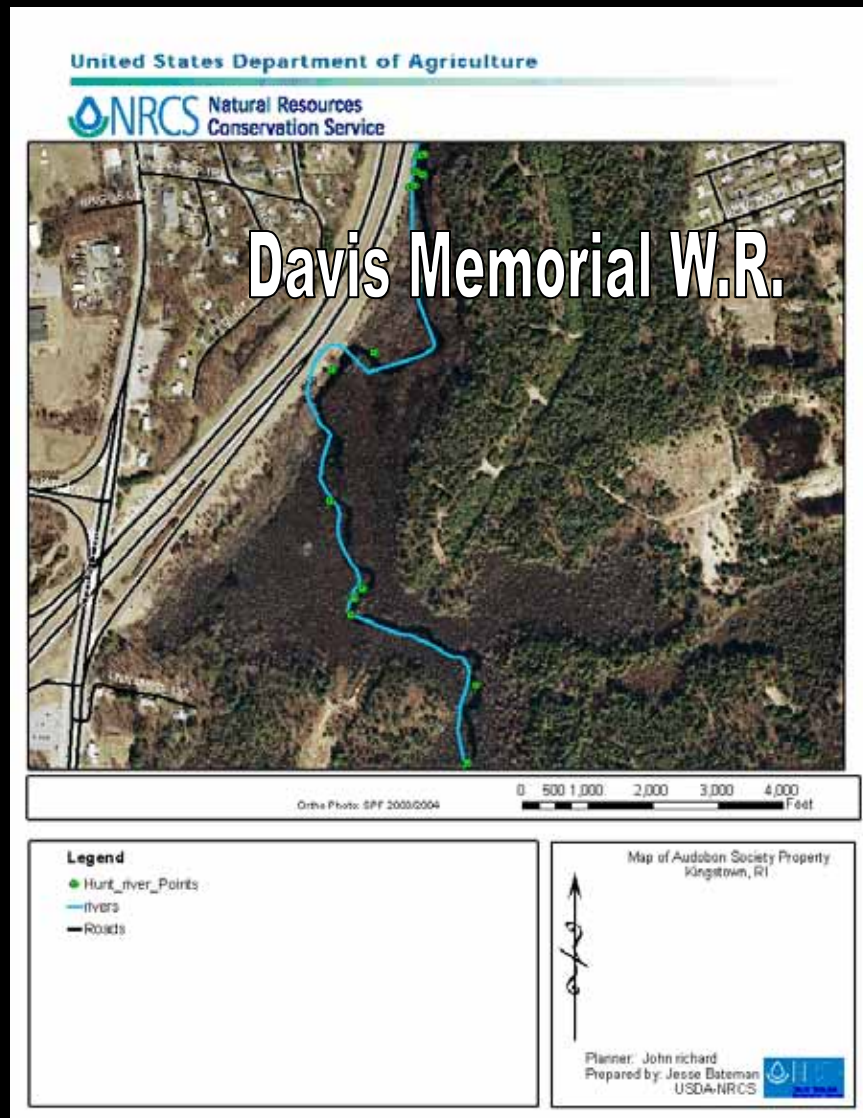
# Everyday Challenges – Invasive Species



**No, not an Audubon refuge!**



# Inventories can guide management





# Monitoring

- Challenges?
- Following standards?
- What is enough information?

# Monitoring guides management





# Monitoring *and* Managing





# Monitoring guides management



# Monitoring and baselines guide restoration





# Managing for species and habitats



© Jim Stasz



# Management Plan Success

- Working documents with amendments
- Thorough yet clear

# Managing Resources

- Challenges?
- Following standards?
- Resources?

# Protocol motivation?

Remembering why we are here...



# Protecting Rhode Island's Habitats





# For home consumption

This afternoon:

Session III – CSC Panel Discussion

Tonight!

[www.ricsc.org/Projects/Docs\\_2009/CSC\\_BDIP.pdf](http://www.ricsc.org/Projects/Docs_2009/CSC_BDIP.pdf)

# Acknowledgments

- Conservation Stewardship Collaborative and the Rhode Island Foundation





# Follow-up?



- [sruhren@asri.org](mailto:sruhren@asri.org)
- Feedback
- Questions
- Suggestions