



## Monitoring Your Land Trust's Protected Properties

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### Why monitor?

- To develop and maintain landowner relationships
- To discover changes in ownership and/or use
- To ensure conservation values are protected (easement is being upheld)
- To uncover violations
- To establish a record in case of future defense needs
- To ensure safety and authorized uses on fee-owned land

**Who monitors?** Staff, volunteers, board members or combination...

### Some factors to consider:

- Consistency of monitor between years
- Impartiality of monitor (owner, abutter?)
- Training and reliability
- Degree of complication – conservation values assessment, access, use, and restrictions

### Issues your Monitoring Program should address:

- Identifying monitors – Who are they? How are they trained?
- Determining frequency and timing of monitoring
- Maintaining contact with landowners (before, during, & after monitoring)
- Developing a consistent monitoring form / checklist for use on site visits
- Storing and maintaining monitoring reports
- Responding to issues and concerns – To whom do monitors report? Who follows up?

### Steps in the Monitoring Process

1. Identify and train monitors
2. Get familiar with each property – location, easement restrictions, stewardship files, previous issues
3. Make landowner contact
4. Gather documents (including monitoring form or checklist), camera, flagging tape, GPS etc.
5. Conduct site visit (*more to come on this below...*)
6. Complete & submit documentation, including: monitoring form/checklist (signed), photos, any additional notes on access, property status or concerns
7. Staff/Committee/Board follow-up: elevate to appropriate response level, address concerns
8. Follow up with landowners

### Site visit should include a record of:

- Property identification (file name, plat/lot, street address)
- Date and duration of inspection
- Identity of monitor and any persons accompanying
- Was the landowner contacted in advance? How and when?
- Was the landowner (or a representative) present during the site visit?
- Description of the area observed – entire property walked? Were all boundaries accessible and identifiable?
- Notation of changes (permitted or in question) since last monitoring visit
- Conditions of observation and method used (under 2ft of snow, walked all bounds vs. visual overview vs. drive by, etc.)
- Observations relative to restrictions, reserved rights, and conservation values
- Photos (with location) & notes describing any possible encroachment, unauthorized use, or other issue

## **Monitoring records need to be clear, consistent, and able to stand up in court!**

### **Consider monitoring at greater frequency when...**

- Land is changing hands
- Land use is changing or specific permitted projects are moving forward
- Specific restrictions or heavy uses heighten risk
- Property is small with lots of abutters
- Property has especially heavy use and/or public access

### **Additional considerations for fee-owned land:**

- Importance of marked boundaries (encroachment, abutters)
- Posting for trespass or hazards (liability)

### **Some additional general considerations:**

- Cultivating good landowner and abutter relationships can support your monitoring program by generating support (donors and volunteers), reducing violations, and increasing awareness about what 'protected' really means
- Formal and informal monitoring are not the same
- Aerial and satellite imagery does not take the place of on-the-ground annual visits, but can be a helpful resource for planning and tracing changes
- Lots of new technology available to streamline the process... check out the Land Trust Alliance learning center, webinars and various online resources; Theodolite smartphone app is supposed to be great for tracking photo positions

### **Useful Resources from the RI Conservation Stewardship Collaborative & the RI Land Trust Council:**

#### 1. Baseline Documentation

- RISCSC Baseline Documentation and Inventory Protocol, Version 2, September 2014:  
[http://www.landandwaterpartnership.org/documents/BDR\\_Protocol\\_ver2\\_2014.11.18.pdf](http://www.landandwaterpartnership.org/documents/BDR_Protocol_ver2_2014.11.18.pdf)
- RILTC Baseline Documentation Workshop Video: <http://www.rilandtrusts.org/workshops.htm>
- RILTC Baseline Documentation Workshop PowerPoint Slides:  
[http://www.rilandtrusts.org/documents/BDR\\_Workshop\\_PowerPoint.pdf](http://www.rilandtrusts.org/documents/BDR_Workshop_PowerPoint.pdf)
- RILTC Baseline Documentation Workshop Handouts:  
[http://www.rilandtrusts.org/documents/BDR\\_Workshop\\_Handout.pdf](http://www.rilandtrusts.org/documents/BDR_Workshop_Handout.pdf)

#### 2. Management Planning

- RISCSC Management Plan Protocol, Version 1, September 2014:  
[http://www.landandwaterpartnership.org/documents/Management\\_Plan\\_Protocol\\_2014.11.18.pdf](http://www.landandwaterpartnership.org/documents/Management_Plan_Protocol_2014.11.18.pdf)

#### 3. Monitoring - RISCSC Monitoring Protocol: In development, coming soon....

### **Pertinent Guidance from the Land Trust Alliance, Highlighting Key Points:**

#### Land Trust Alliance Standards and Practices (2004)

Standard 11: Conservation Easement Stewardship > Practice 11C > Easement Monitoring

- Properties monitored at least annually
- Monitoring documentation collected

Standard 12: Fee Land Stewardship > Practice 12D > Monitoring Land Trust Properties

- Boundaries are marked
- Monitoring occurs regularly

### **Additional Land Trust Alliance Resources ([www.lta.org](http://www.lta.org)): examples on 'The Learning Center'**

- Conservation Easement Stewardship (2008) by Renee J. Bouplon and Brenda Lind
- Caring for Land Trust Properties (2008) by Hugh Brown and Andrew Pitz