



## Rhode Island Land & Water Summit

MARCH 11, 2017



All images courtesy of accredited Scenic Hudson (NY). Background: Conserved farmland at Old Mudd Creek Farm in Livingston, NY/Robert Rodriguez, Jr., photographer. Banner images - left to right: Hudson River kayaker at Scenic Hudson's Foundry Dock Park in Cold Spring, NY/Nick Zungoli, photographer; Flowerbeds at Scenic Hudson's Foundry Dock Park in Cold Spring, NY/Robert Rodriguez, Jr., photographer; Cattle on conserved farmland at Northwind Farm in Red Hook, NY/Robert Rodriguez, Jr., photographer; View of the Hudson River and Catskill Mountains from Scenic Hudson's Poets' Walk Park in Red Hook, NY/Robert Rodriguez, Jr., photographer.



## Managing an Effective Volunteer-based Stewardship and Monitoring Program



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## STEWARDSHIP & MONITORING



### INSPIRATION

Be inspired to protect the great work of your land trust.



### TOOLS

Learn about tools to help ensure success.

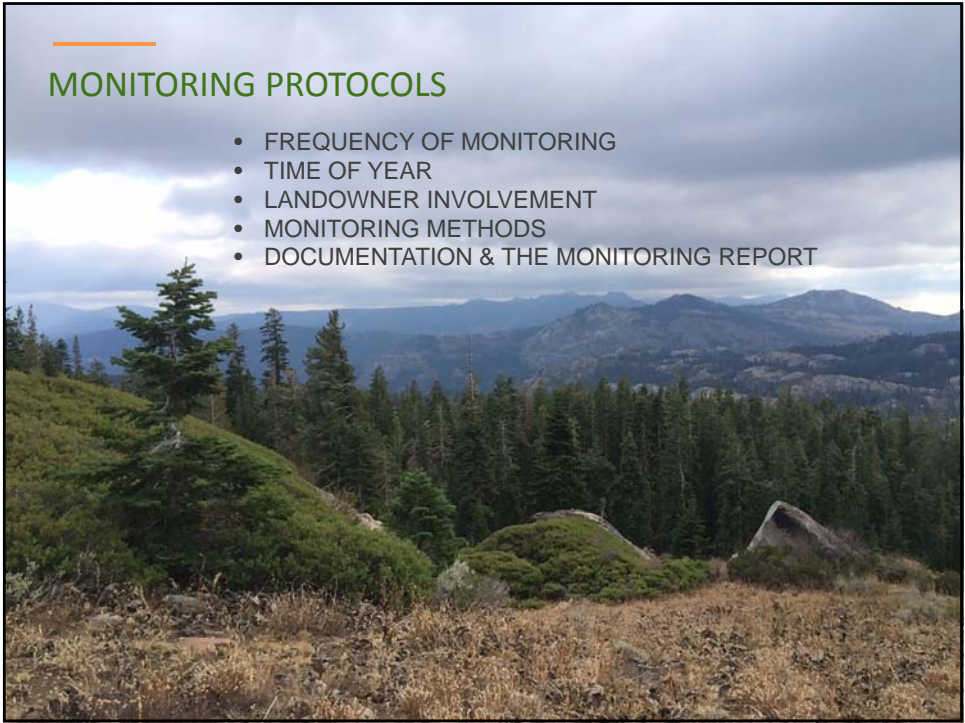


### ACTION

Leave with steps to help you take action.

## ANNUAL MONITORING

- CONSERVATION VALUES
- IRS REQUIREMENTS
- PUBLIC TRUST
- LANDOWNER RELATIONS
- LEGAL DEFENSE



## MONITORING PROTOCOLS

- FREQUENCY OF MONITORING
- TIME OF YEAR
- LANDOWNER INVOLVEMENT
- MONITORING METHODS
- DOCUMENTATION & THE MONITORING REPORT

## ANNUAL MONITORING REPORT FORM

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**OBSERVATIONS MADE DURING MONITORING VISIT** (to be completed by monitor)

Describe area monitored (such as entire property, eastern boundary, trails, etc), method of inspection (foot or car) and weather or ground conditions.

- Name of property
- Date of visit
- Name/affiliation of monitor
- Observations
  - affirmative responses
- Route taken & conditions
- Landowner presence

Condition of SLT signs:  Like new  Good  Poor  Missing  NA

Have current land uses and management activities changed since the last visit?

Agriculture	<input type="checkbox"/> Yes	<input type="checkbox"/> No Change Observed	<input type="checkbox"/> NA
Forestry	<input type="checkbox"/> Yes	<input type="checkbox"/> No Change Observed	<input type="checkbox"/> NA
Recreation	<input type="checkbox"/> Yes	<input type="checkbox"/> No Change Observed	<input type="checkbox"/> NA
Other	<input type="checkbox"/> Yes	<input type="checkbox"/> No Change Observed	<input type="checkbox"/> NA

If 'Yes', describe:

Are there any significant land use changes on neighboring properties from the last visit?  
 Yes (describe)  None Observed

6

## MANAGING A VOLUNTEER MONITORING PROGRAM

### Key Components

- Recruitment
- Training
- Resources
- Recognition



7

## MANAGING A VOLUNTEER MONITORING PROGRAM

RECRUITMENT

TRAINING

RESOURCES

RECOGNITION



- Who
- How
- Where

**Conservation Stewards:  
Fun Outdoor Volunteering!**

Annual monitoring of conserved lands takes you to the fringes of spectacular protected properties. Volunteers also play an integral role in achieving SLT's goal of ensuring the long term integrity of its conserved lands.

**Volunteer Steward Training  
Saturday, May 21st 9am -1:30pm**

Training in the field with State Lands Forester Dave Wilcox will teach you about observing and interpreting changes in the forest. Training will also include a presentation about SLT's Stewardship Program and skills for finding parcel boundaries.

**Please contact Becca Washburn at  
802.253.7221 or  
becca@stowelandtrust.org**



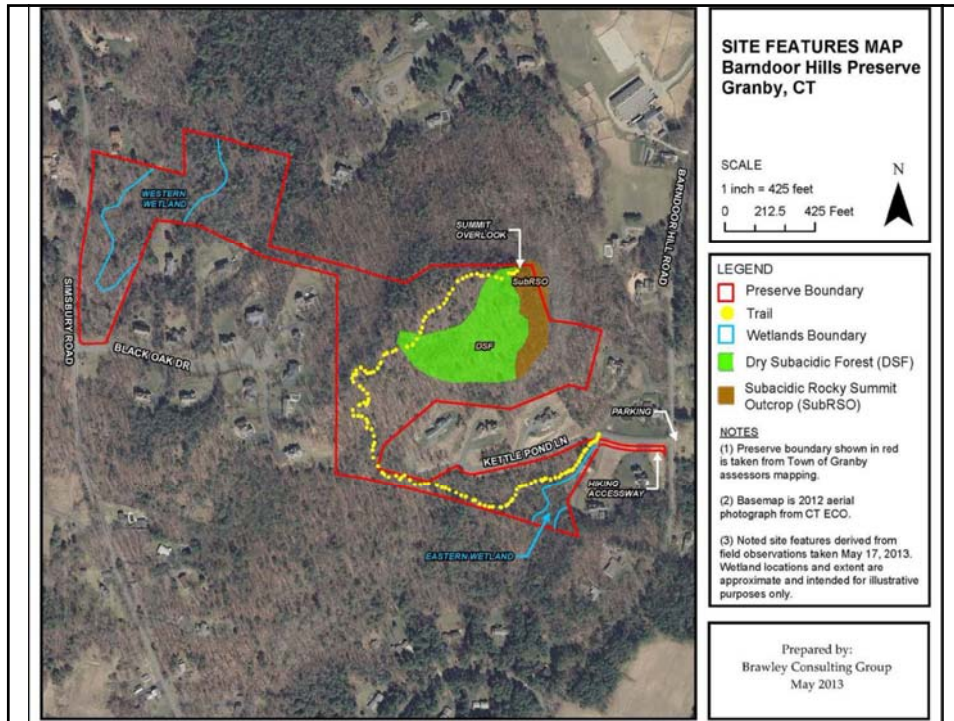
We are looking for volunteers to monitor these conserved lands:

- Wiessner Woods - 79 acres
- Page Forest (Sterling Valley) - 99 acres
- Sunset Rock - 23 acres
- Nichols Field - 37 acres
- Moscow Ballfield - 4.7 acres

**MANAGING A VOLUNTEER MONITORING PROGRAM**



- Conservation easements 101
- Roles & expectations
- Preparing for the visit
- Outdoor skills
- Troubleshooting difficult situations
- Completing the report



## MANAGING A VOLUNTEER MONITORING PROGRAM

RECRUITMENT

TRAINING

RESOURCES

RECOGNITION



- Annual Monitoring Guidelines
- Annual Training
- 1:1 Assistance
- Stewardship Binder
- Tools for Monitoring

## MANAGING A VOLUNTEER MONITORING PROGRAM

RECRUITMENT

TRAINING

RESOURCES

RECOGNITION



- Importance
- Methods



## VOLUNTEER PROGRAM COORDINATOR

- Can be staff or a volunteer
- Annual calendar & work plan for monitoring program
- Recruitment, training & appreciation of volunteers
- Tracks monitoring activities & contact with landowners
- Coordinates follow up activities with stewardship staff
- Ensures consistency with *Standards & Practices*



1414





PUTTING IT ALL TOGETHER

- Letter to current volunteer stewards
- Letter/phone call to landowners
- Identify additional volunteer needs
- Coordinate community outreach
- Review monitoring report form for revisions/updates
- Annual training
- Annual celebration
- Reminders to monitors
- Updates to tracking spreadsheet
- Review report forms for stewardship tasks/follow up



ADDITIONAL RESOURCES

- Rhode Island Land Trust Council website
- Land Trust Alliance Learning Center
- Standards and Practices Curriculum Guides
  - *Managing Conservation Easements in Perpetuity*
  - *Caring for Land Trust Properties*
  - *Determining Stewardship Costs*
  - *Easement Stewardship*



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## ADDITIONAL RESOURCES

- Monitoring Program Annual Planning Calendar
- Sample Monitoring Practices
- Sample Field Guide to Monitoring Conserved Lands
- Sample Volunteer Steward Training Agenda
- Sample Letter to Stewards
- Sample Post Monitoring Landowner Letter
- Sample Annual Monitoring Report Form
- Sample BDR Outline
- Sample BDR
- Obtaining Signatures for Older BDR's
- Sample BDR Policy
- Easement Revitalization: A Problem Solving Guidebook for Land Trusts (see page 95 for information about current conditions reports)

17



# Thank you!

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