Monitoring Your Land Trust’s Protected Properties
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Rhode Island Land Trust Council &
Rhode Island Stewardship Collaborative
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, a 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...*)
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:

- 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 needs 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
   - RILTC Baseline Documentation Workshop (Video, PowerPoint Slides, Handouts)

2. Management Planning

3. Monitoring
   - RICSC Monitoring Protocol: In development, coming soon....
Pertinent Guidance from the Land Trust Alliance, Highlighting Key Points:


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

(key indicator practices for accreditation & TerraFirma eligibility)