

C. MONITORING POLICY & FIELD FORMS

Oakland Land Conservancy

BOARD POLICY 4.B. Monitoring of Protected Properties

Adopted by Oakland Land Conservancy Board of Trustees: January 8, 2006

Land Trust Alliance Standard 11.F. Easement Monitoring

"The land trust monitors its easement properties regularly, at least annually, in a manner appropriate to the size and restrictions of each property, and keeps documentation of (such as reports, updated photographs and maps) of each monitoring activity."

Land Trust Alliance Standard 12.D. Monitoring Land Trust Properties

"The land trust marks its boundaries and regularly monitors its properties for potential management problems (such as trespass, misuse or overuse, vandalism or safety hazards) and takes action to rectify such problems."

Purpose:

The purpose of this policy is to establish the requirement that all Oakland Land Conservancy conservation easements, preserves, and other properties as approved by the Board of Trustees are monitored at least annually and establishes standards and criteria for monitoring.

Policy:

The Conservancy shall conduct at least one formal annual inspection of Conservancy conservation easements and preserves. Other properties in which the Conservancy holds no legal interest (such as community parks and easements) shall be monitored by the Conservancy only upon approval by the Board of Trustees. The purpose of the inspection is to monitor the overall condition of the site's natural features and compare any activity on the site against the permitted and prohibited uses in the conservation easement or other restrictions. The inspection report shall comprise written reports and evaluations, maps and photographs and is part of the permanent file for that property. The inspection is the responsibility of the Stewardship Director and is performed with the assistance of other staff members, volunteers, and consultants at the discretion of the Stewardship Director.

Procedure:

Landowner Communication:

1. Send a monitoring inspection notice letter to easement landowner early in the year with a reminder that the easement is due for annual inspection; explanation of purpose of inspection; and the scheduled date and time for the inspection. Encourage the landowner to participate in the inspection visit and tell them they are welcome to call and reschedule if needed. If the property is a preserve or a subdivision open space; the Conservancy may announce scheduled inspection to adjacent landowners and encourage them to participate in the inspection.
2. Conservation Easement. Follow up with a phone call to confirm the inspection appointment, and again to welcome the landowner to participate in the site visit.

Preparation for Monitoring Site Inspection:

1. Prepare a monitoring file that consists of:
 - a. Location map
 - b. Updated aerial photograph
 - c. Legal description and/or survey
 - d. Conservation easement or any deed restrictions for preserve or subdivision open space
 - e. Baseline Documentation Report or other baseline information
 - f. Information from past monitoring inspections as relevant
 - g. Report forms
2. Review in detail:
 - a. Conservation easement (purposes, conservation values, permitted uses and prohibited actions) or restrictions for preserve or subdivision open space
 - b. Any history of violations or other concerns
 - c. Any special natural features or species of interest on the property
 - d. Location of easement boundaries
 - e. Location of photomonitoring points
3. Map out a planned route through the property to plan the visual inspection of boundaries and property features and to plan for taking photographs at established photomonitoring points
4. Assign specific tasks to team members, such as note-taking, photography, or GPS.

Site Visit Procedure:

1. Talk to the landowner of conservation easement or participating adjacent landowners of preserves and subdivision open space. Find out if they have any concerns about their property or need information. Building this relationship is very important and will help to prevent violations in the future. If this is a new landowner of a conservation easement, bring copies of all relevant documents concerning the easement and schedule extra time to go over it with them. Record names and contact information of all participants on inspection form.
2. Follow planned route through the property, taking notes on aerial photograph and inspection form concerning the following:
 - a. Plants in bloom or any plants of interest
 - b. Signs of animals
 - c. Invasive plants
 - d. Uses of the land
 - e. Uses of adjacent properties
 - f. Signs of any activities consistent with the terms of the easement or other restrictions
 - g. Signs of any activities NOT consistent with the terms of the easement or other restrictions
 - h. Any natural occurrence that may be causing problems, such as erosion
 - i. Any stewardship that has been taking place and its effects, such as invasive plant control, selective cutting, or controlled burns
3. Take photographs at photomonitoring points
4. Take other photographs as needed, noting in detail on aerial photograph the location and aspect of the photograph
5. Conservation Easement. If concerns or possible violations are noted, discuss observations with the landowner and collect as much information as possible. Never make a decision on site as to whether or not a violation has occurred (See Board Policy 4.C. Conservation Easement Violations)
6. When finished, say goodbye to the landowner. Allow enough time to visit further with the landowner if you are invited.

Site Visit Follow Up:

1. No later than the day following the site visit, send a handwritten note to the landowner or participating neighbors thanking them for their time the day following the site visit.
2. Provide any information or educational materials requested by landowner or neighbors within one week of inspection visit
3. Complete notes and file all documents in the current year's stewardship file
4. Follow up on any concerns or suspected violations as appropriate
5. Send landowner a formal letter enclosing a copy of the final inspection report. Be very careful never to explicitly say that there were no violations seen on the site visit or to identify a concern as a violation. Report, photographs and maps are placed in the permanent file for the conservation easement.

Date

Name

Address

Address

Re: Invitation to join Oakland Land Conservancy staff on our Annual
Monitoring Inspection of NAME Preserve

Dear Name,

Greetings and welcome to the 2006 Oakland Land Conservancy field season.

It is time once again for us to schedule our annual monitoring inspection of the Oakland Land Conservancy nature preserve that is adjacent to your property. The main purpose of the inspection is to document the current condition of the preserve. Another reason that we look forward to our visit every year is because we enjoy sharing information and talking our neighbors about ideas that may help both of us manage our natural areas.

Please join us during the inspection visit if at all possible. We have tentatively scheduled our inspection for the following date and time for the inspection:

TIME
DAY, DATE

Please call me at (248) 601-2816 if you would like to RSVP to this invitation. Your participation is very important to us.

If you have any specific requests for information or other resources you would like us to bring along when we visit, please call and let me know.

I look forward to visiting you.

Best regards,

Heather Huffstutler
Land Steward

Cc:

Oakland Land Conservancy
MONITORING INSPECTION REPORT

Property Name:

INSPECTION VISIT DATA

Date of Site Visit: _____

Steward's Name: _____

Name of team member taking photographs: _____

Time Spent on Property: _____

Names of members of site visit team:

Did landowner or representative accompany site visit team? Yes No

Name of landowner or representative and relationship to property:

List all attached correspondence and relevant documents: Map/Aerial Photograph Species List
 Photograph Data Form Other: _____
 Photograph Thumbnail Sheet Other: _____

List Animal Species observed:

INSPECTION VISIT NOTES

Present use(s) of the restricted property:

Did you observe any uses or changes to the property that are of concern? If "Yes", describe in detail: Yes No

Are the uses or changes recorded above potentially in conflict with the conservation easement or other restrictions? If "Yes", describe in Yes No detail:

Describe the general condition of the property:

Did you notice any exotic plant species? If so, which species and where?

Remarks (particularly to present condition and uses of property):

Recommended next steps:

Recommended next steps:

Signature of Conservancy Personnel: _____ **Date:** _____

Print Name: _____ **Title:** _____

Date

LANDOWNER NAME

Address

Address

Dear NAME:

Personal greeting as appropriate... such as: It was a pleasure to visit with you and Mrs. Landowner on date and to look over the Conservation Easement area together. Say something nice about something that you especially found interesting or nice.

Paragraph providing further information of interest, such as: I have conducted some research to answer your question about whatever and here's the answer (who to call, web site to visit). Or I have enclosed the following information: list it here. I hope this is helpful. Feel free to give me a call if I can provide anything else. Or I have identified the interesting plant or insect we found. Or something about biological diversity – I am also enclosing the list of plants and animals we observed on our visit. Something to keep the landowner excited and interested in the quality of the Easement. (Of course, if no friendly intercourse has occurred – you can skip these two paragraphs!)

Enclosed you will find the 2006 Annual Monitoring Inspection Report for the CONSERVATION EASEMENT NAME in CITY OR TOWNSHIP. We visited the site on DATE with PEOPLE to document the current condition of the Conservation Easement area.

As noted on the Report, we have identified the following areas of concern on the Conservation Easement:

1. Example: Dumping of hay on the southwest border of the property. This dumping appears to be coming from the adjacent property. We recommend contacting your neighbor regarding this problem. Please let us know if we can be of any help in this matter.
- 2.

Please feel free to contact us with any questions you may have about your land, the Conservation Easement or the Oakland Land Conservancy.

Sincerely,

Susanne Greenlee
Conservation Scientist

Cc:
Enclosures

*Conservation Easement Annual Monitoring Inspection
Follow up letter*