

SAMPLE

Conservation Easement Monitoring Annotated Template

The purpose of the monitoring report is to determine compliance of clauses in the Conservation Easement (CE) and to ensure that the intent and objectives of the CE are being upheld. The monitoring report enables the land trust to track condition of the property over time through comparison with the baseline documentation report (BDR). It also provides an opportunity for the qualified organization and the landowner to build on their positive relationship and to review the CE during the monitoring exercise. The frequency of monitoring varies between land trusts, but ideally each property will be visited annually. If costs are a concern to a land trust, every second year may be acceptable as long as the land trust has contact with the land owner in between monitoring years. If monitoring is not handled on an annual basis, undertaking a landowner risk assessment may help a land trust prioritize properties for more intensive monitoring.

1.0 INTRODUCTION

The introduction section of the monitoring report provides general information on the property, landowner and individual preparing the monitoring report.

1.1. Property Name

- Name of CE property (refer to easement)
- Date CE was signed

1.2. Property Contact

- Owner name
- Contact Person (if different from above)
- Contact info: phone number, email and mailing contact

1.3. Monitoring Conducted by:

- Name of individual completing baseline
- Dates of site visits
- Contact info: phone number, email and mailing contact
- Sign declaration from the monitor that the information collected is confidential.

***I understand that the knowledge I gain and the information I collect is confidential and belongs to the ??? Land Trust and should only be discussed with members of the ??? Land Trust Board.

2.0 Past Issues and Concerns

There is a certain amount of preparatory work involved before the site visit. The monitor will review the BDR, management report/plans and past monitoring reports (including all associated photos and maps) to become familiar with the property and past concerns or issues documented on previous site visits.

2.1 List past identified concerns/ areas where attention is suggested

- Review baseline report and past monitoring reports to identify issues/concerns
- List the issues/concerns and comment on current situation (Has the issue being addressed? How has it been addressed?)
- If there are no past concerns state in monitoring report.

3.0 Site Visit

The site visit is an opportunity for the land trust to build on or maintain its relationship with the landowner, either by inviting them to join the site visit and/or by undertaking a landowner interview. The monitor will review each permission and restriction (table form in the CE; see below) and document the method used to assess the permission/restriction and what has changed since the BDR was completed. For example, if the land owner is permitted to post signage, the measure would be presence/absence; if the landowner has recently placed a sign, indicate “yes” there are changes from the BDR; describe and take a photo to highlight the change. If a restriction occurs that is in violation of the CE, a detailed description will be provided below the table.

All changes, natural and man-made will be documented even if they do not impact the intent of the CE.

3.1 Landowner Relations

- Was the landowner present during the site visit (Yes/No)
- Interview the landowner (suggested questionnaire Appendix A)
- Identify how long the current owner has owned/lived on the property?

3.2 Monitoring Restrictions Table

- Adjust monitoring restrictions table (Table 1) in the site visit section to match list of restrictions in CE.
- Measure: Method used to assess restriction (visual observation on site visit, landowner report, document (report, land title), air photo, sample collected and analyzed.
- Visual observation of changes since BDR (presence/absence should include a photo)

Table 1: EXAMPLE Land Owner Rights and Permitted Uses

Owners Rights and Permitted Uses	Measure	Changes from baseline/last monitoring report (Y/N)	Describe	Photo
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Signs The Owners have the right to post signs.	Presence/absence			
Access The Owners can control and restrict access.	Landowner interview			
OTHERS IN CE				

Table 2: EXAMPLE Restrictions in CE

Restrictions	Measure	Violation (Y/N)	Describe	Photo
Destruction of Vegetation No cutting, removal, or destruction of vegetation.	Observational evidence of changes to vegetation communities			
Drainage and Diversion of Water Courses No alteration, diversion or drainage of water courses.	Observational evidence of changes to water courses (e.g. no structural barriers evident)			
Pollution of Water Courses No pollution or degradation of water courses or water bodies on the property.	Question in land owner interview and water sample for streams at entry and exit point			
Construction No building except as allowed by the management plan in the CE.	Presence/absence			
Subdivision No application for subdivision.	Presence/absence			
OTHERS IN CE				

Changes will be documented using location (GPS waypoints; nad83), photos and specifics on the violation (describe severity and scope) and if it has an impact on the intent of the CE. Where appropriate suggest possible actions or resolutions.

3.3 Wildlife Observations during site visit or by landowner

- List species (flora and fauna) observed by the monitor or landowner since the previous visit.

3.4 Water

- Were there any water quality studies/research done on the site
- Note the location of water samples
- Results of any water quality samples taken

3.5 Document significant changes observed on the property

- Natural changes (e.g. water course change due to flooding, fire)

- Land use changes
- Document changes/violations by using maps, photos (GPS waypoints) and attach in Appendix B.

4.0 Agreement Monitoring Report

- Sign off by land trust board member and landowner with date of completion.

Appendix A: Landowner Interview

To help inform information in the monitoring report, suggest interviewing the landowners.

- a. Length of time as owner of property?
- b. Are the land use activities the same on the property as reported in the Baseline Document Report?
- c. Changes in management regime (are there any new management plans).
- d. Are there any significant changes to the landscape as a result of natural causes? (e.g. fire, flooding)
- e. Are there any significant changes to the landscape caused by humans? (e.g. neighbors, third party)
- f. Do you have invasive species on the property (list species if possible) and discuss location of patches?
- g. Are you aware of any water quality concerns and assessments on this property?
- h. Are you aware of areas where chemical pesticides or fertilizers have been used on the property?
- i. Please list species you have seen on the property and frequency of sightings in the last year?
- j. Are there things you are concerned about from a stewardship perspective that the land trust might be able to assist you with?

Appendix B: Documented changes since BDR and/or last monitoring period.

If the monitor finds evidence of a violation or change of condition since the BDR or monitoring report, it is important to document the change using GPS (maps), photos and detailed descriptions. Describe the extent and severity of the impact. There is no need for a conversation with the land owner at this time, a board member will follow up with the land owner once the potential violation has been reviewed internally.

Prepared by Miistakis Institute for Foothills Land Trust

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Disclaimer

This Monitoring Report Template was created for the Foothills Land Trust and may or may not be appropriate for all land trust organizations. It is available for any land trust to use and to adapt for its own purposes. Foothills Land Trust is not responsible for any results achieved or decisions made through the use of the Monitoring Report Template.