

Conservation Easement Stewardship

MONITORING

RECORD KEEPING

DEFENSE

RESOURCES--FUNDING & CAPACITY RESOLUTIONS

PROPERTY DATA CONTACTS GIS NOTICES AND APPROVALS

SCHEDULING PREPARATION SITE VISIT REPORTS

MONITORING: PURPOSE

- Required by IRS
 - Once per calendar year
- Build relationship with landowner
- Support good land stewardship
- Detect and resolve potential or actual violations early on
- Create a record of changes and conditions of the land
- Build community support and awareness of conservation



MONITORING

1. Schedule with landowner, caretaker/manager, funding entity representatives

2. Prepare by reviewing BDR, checking land ownership, reviewing boundaries and aerial photographs, phone interviews with landowner, caretaker/manager

3. Conduct site visit, gather data and photos

4. Complete and submit reports

BDR: PURPOSE

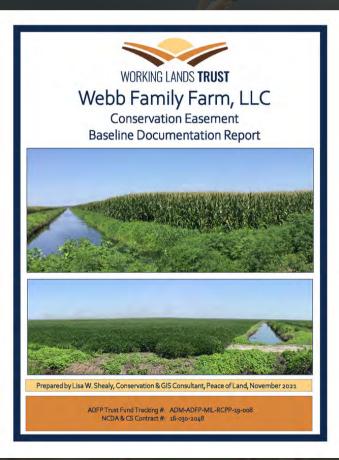
- Document Conservation Values and conditions of the property to meet IRS standards of eligibility for a qualified conservation contribution (PUBLIC BENEFIT)
 - Open space—farm and forest land clearly delineated conservation policy
 - Open space—farm and forest land scenic views to public
 - Historic—nationally designated NRHP or within a NHD
 - Relatively natural habitat
 - Public access

CONSERVATION EASEMENT STEWARDSHIP

- Document Conservation Values and conditions of the property at the time of grant of Conservation Easement for monitoring and stewardship purposes (IRS + additional state, county, etc.)
 - Water quality
 - Local food
- Serve as permanent record/legal admissible evidence in court
 - Hearsay Rule exception/evidentiary rule—produced in the course of regularly conducted business



BASELINE DOCUMENTATION REPORT



WORKING LANDS TRUST Conservation Easement Baseline Documentation Webb Family Farm, LLC Table of Contents A. Acknowledgement of Condition Signed Copy of Acknowledgement of Condition. B. Property Information Property Description and Summary of Conservation Easement. Easement Donor Contact Information. Directions to Protected Property. Access and Navigation Map. Survey Plat. County Tax Map. C. Maps and Management Plan(s) Protected Lands Network Map.

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16

| | Survey Plat. | 1 |
|------------|---|-----|
| | County Tax Map | |
| 5. | Maps and Management Plan(s) | |
| | Protected Lands Network Map | 2 |
| | ENC Sentinel Landscapes Map | |
| | 2016 NAIP True Color Aerial Photograph Map | 2 |
| | Topography and Hydrology Map(s) | |
| | Land Cover/Land Use Map | |
| | Soil Map(s) | |
| | Man-Made Features and Impervious Surface Map | |
| | Management Plan | |
| D . | Photographic Record of the Protected Property | |
| | Documentation Photographs | |
| | Photograph Index and Descriptions | |
| | Photo Location Map | |
| Ξ. | Environmental Surveys & Reports | |
| | Environmental Site Assessment—Phase I | |
| | Hazardous Materials Checklist | |
| Ξ, | Conservation Easement | |
| | Recorded Copy of Conservation Easement | |
| 5. | Credentials of Baseline Preparer | 134 |
| | Biography | 135 |
| | 2 | |

BASELINE DOCUMENTATION REPORT

- Acknowledgement of Condition
- Property Information
 - Property Description and Summary of Conservation Easement
 - Easement Donor Contact Information
 - Directions to Protected Property
 - Access and Navigation Map
 - Survey Plat
 - County Tax Map
- Maps and Management Plan(s)
 - Protected Lands Network Map
 - NAIP True Color Aerial Photograph Map
 - Topography and Hydrology Map(s)
 - Land Cover/Land Use Map
 - Soil Map(s)

- Man-Made Features and Impervious Surface Map and Index
- Management Plan
- Photographic Record of the Protected Property
 - Documentation Photographs
 - Photograph Index and Descriptions
 - Photo Location Map
- Environmental Surveys & Reports
 - Environmental Site
 Assessment—Phase I
 - Hazardous Materials Checklist
- Recorded Copy of Conservation Easement
- Credentials of Baseline Preparer

CONSERVATION EASEMENT STEWARDSHIP

FIELD EQUIPMENT

- Maps, reports, BDR
- Measuring tape reel
- Measuring wheel
- Magnetic locator
- Rangefinder
- GPS-enabled camera (phone, tablet, data collector)
- Drone
- Bike, ATV, Boat, Airplane





















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|--------------------|--------------------------|-------------------------------------|------------------------|----------------------|------|
| Property Inform | nation | | Current | Landowner(s) | - 1 |
| IC EPA Ecoregion | | | | | Mar |
| County | | | Acres | | |
| arcel(s) | | | Encumb | orance(s) | Mar |
| rotection Type | | | | | |
| unding Type(s)/ | | | Enrolled | i Programs | |
| o holder(s) | | | | | Pho |
| Appitoring Infe | rmation | | | | - |
| Monitoring Info | ormation | | | | Des |
| Date of Visit | | WLT Representative(s) | | | _ |
| Date of Last Visit | | Accompanied by: | | | - |
| Marketed for Sale | | Listing Agent | | | |
| Current Land Uses | | | | | Mar |
| | Forestry | | | | - |
| | Recreational Residential | | | | |
| | Other | | | | Foll |
| Sudividad Tracts P | | f no subdivision is permitted an | d tract must be keld i | n single menershin) | 4 |
| | | general activities since last mor | | in single ownersnip) | - |
| roperty managen | iteric (automaty b) | Belieral activities since last mor | into inig visit/ | | |
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| Property Managen | ant Dise on Ris | Data of Plan | Preparer(s) | | |
| | | | | | |
| Agricultural Manag | gement (Summary | of agricultural activities since la | ist monitoring visit) | | |
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| Agrīcultural Manag | gement Plan on file | | | | |
| Habitat/Forest Ma | nagement | | | | |
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| Caract Managama | | | | | |
| Forest Manageme | nt Plan on file | | | | 1 |
| Forest Manageme | nt Plan on file | | | | Si |

| Structures Present | | | |
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| Structure Allowance | | | _ |
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| Management Issue(s) | | | |
| 1 | | | |
| Management Issue(s) Description | | | |
| | | | |
| | | | |
| Photos Taken? | | | |
| | | | |
| Description of photos | | | |
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| Management Goals/Objectives | | | |
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| n. at the | | | |
| Follow up | | | |
| | | | |
| | | | |
| Additional Notes: | | Date: | |
| | | | - |
| Approved by: | WLT Position: | | |
| Approved by: | WLT Position: Date: | | _ |

RECORD KEEPING

- GIS/Mapping • Esri--ArcGIS • QGIS, GRASS • Google Earth • Database--(Conservation **Portfolio and Contacts**) Landscape--Conservation Easement specific software • Excel • Access Document storage
 - Cloud service (e.g. Dropbox)
 - SOPs, Policies



NOTICES AND APPROVALS

- Buildings—site location, size
- Forest management
- Agricultural management
- Buffer/riparian management
- Recreational uses
- Commercial uses

"A land ethic, then, reflects the existence of an ecological conscience, and this in turn reflects a conviction of individual responsibility for the health of the land. Health is the capacity of the land for selfrenewal. Conservation is our effort to understand and preserve this capacity." ALDO LEOPOLD

DEFENSE

- Staffing capacity
- Policies and Procedures
- Risk management
- Conflict resolution
- Legal representation
- Stewardship Fund



JOIN US IN THE FIELD!

