LANDSC/\PE

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A Training Demo for NC Soil & Water District Staff

Lisa Shealy, Working Lands Trust
Michael Madole, Landscape
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Introductions: Lisa Shealy

- 17+ years of Land Trust experience
- 20+ years of GIS experience
- 2+ years of government agency experience at federal, state, and county levels
- 3+ years of private consulting
- Completed 150+ conservation easements totaling nearly 100,000 acres
- Produced 120+ Baseline Documentation Reports for conservation easements (including Lowcountry Land Trust, Audubon South Carolina, WLT, GA-AL Land Trust, TNC GA; Supervised production of additional 50+ BDRs for conservation easements
- Managed stewardship of a conservation portfolio of 500+ property interests

- M.S. Environmental Studies, College of Charleston
- B.S. Biology, B.S. Ecology, University of Georgia
- Certified Remote Pilot (USDOT/FAA)
- Certified Geographic Information Systems Professional (GISCI)

Introductions: Michael Madole

Michael is Account Manager of Dendroyka LLC. He came to Landscape from the Trustees of Reservations, where he helped modernize their easement stewardship program, which oversees the largest private portfolio of easements in Massachusetts. Before that, Michael served as an Americorps land steward at a small regional land trust in Western Massachusetts. When Michael's not helping onboard new clients, writing knowledge base articles, or responding to tech support questions, he can be found in the woods with his horse Hazel practicing low impact forestry as Hilltown Horse Logging.

Thank you

North Carolina
Tobacco Trust Fund Commission
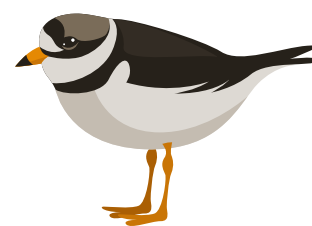
NC FOUNDATION for
SOIL & WATER
CONSERVATION

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NORTH CAROLINA
SOIL & WATER
CONSERVATION DISTRICTS
Yours for Life

WORKING LANDS TRUST

Agenda

10:00	Welcome:	Introductions/Agenda
	Presentation:	Landscape Overview & Primary Features
		Landscape Record Types: Properties, Projects & Funding
		Contact Management
		Landscape Products: Forms, Views & Reports
		Document Storage
		Site Visits
		Mapping & Photos
	Demo:	Track and Assess Prospective Conservation Opportunities
	Break:	10 min
11:00	Demo:	Inventory and Monitor Existing Conservation Interests
	Presentation:	Monitoring Workflow
	Video:	Mobile App Video
	Demo:	Knowledge Base
		Q & A
12:00	Wrap Up:	Complete Survey & End

What is LANDSCAPE ?

- Tools (database software and mobile app) for conservation acquisition and stewardship
- Created and administered by former land trust staff
- Used by over **180 land trusts and government agencies**
- Manages records for ~**7.5**M acres (and counting....)
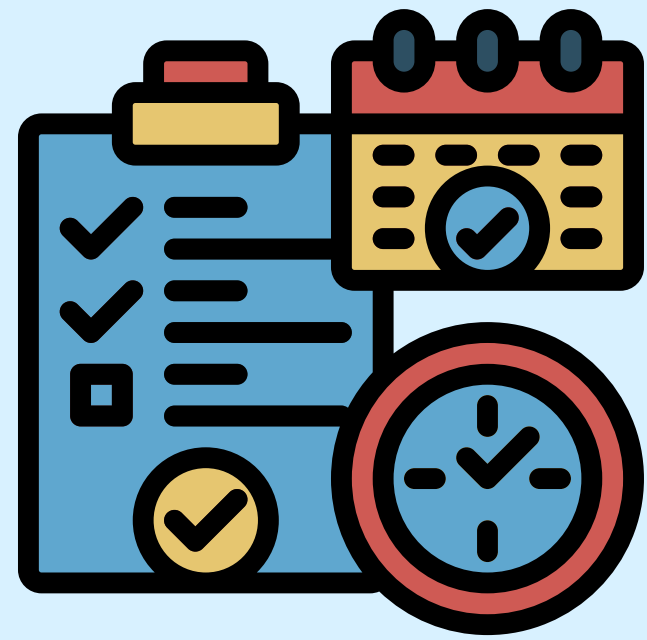
DENDROYKA

LANDSCAPE

Michael

Caleb

Dan

Project Management

- Task lists to track due diligence on acquisitions, restorations, and stewardship projects.
- Track budgets, funding sources, and expenses
- Assign tasks. Visualize project tasks on a timeline. Receive email alerts about upcoming deadlines

Mapping

- View your GIS data alongside the Landscape records you're using to capture information.
- Import shapefiles, geotagged photos, .kml or .gpx files. Export shapefiles or .kml files for further processing with GIS software
- Query publicly hosted map layers (county parcels, wetlands, or rare species habitats (if available in your area)

Data Summary & Reports

- Views allow you to query, group, sort, count, and summarize your data.
- Reports allow you to merge any data in your account into a .pdf format.
- Send reports to others for review and finalization

Document Storage

- Intuitive document storage design.
- Upload documents directly to Landscape and access anywhere – 100GB of storage (more with additional fee)
- Integrate with cloud storage solutions like Google Drive™, Sharepoint™, and DropBox™

Contact Management

- Link contacts to properties and other records
- Use Landscape's contact management system alone, or with CRM tools like Little Green Light™ or Salesforce™

Mobile Site Visits

- Navigate properties, take photos, and fill out forms with or without data connectivity. Offline data collection with iOS or Android devices.
- Easements, BDRs, past monitoring reports, photos, current/past issues, notes and monitoring tracks are available at your fingertips.
- Automate the creation of monitoring reports and baseline report photo sheets in minutes!
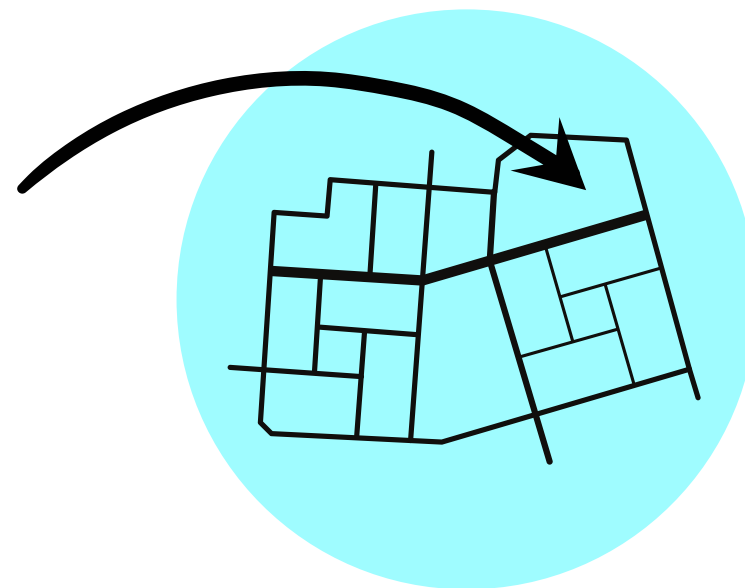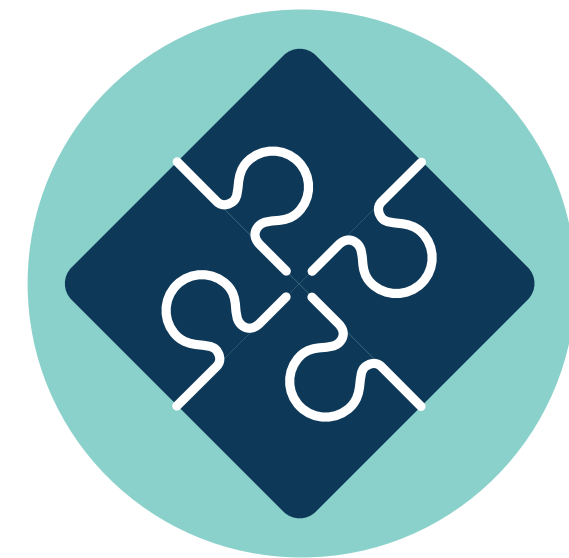
Landscape Record Types

Geographical

Property
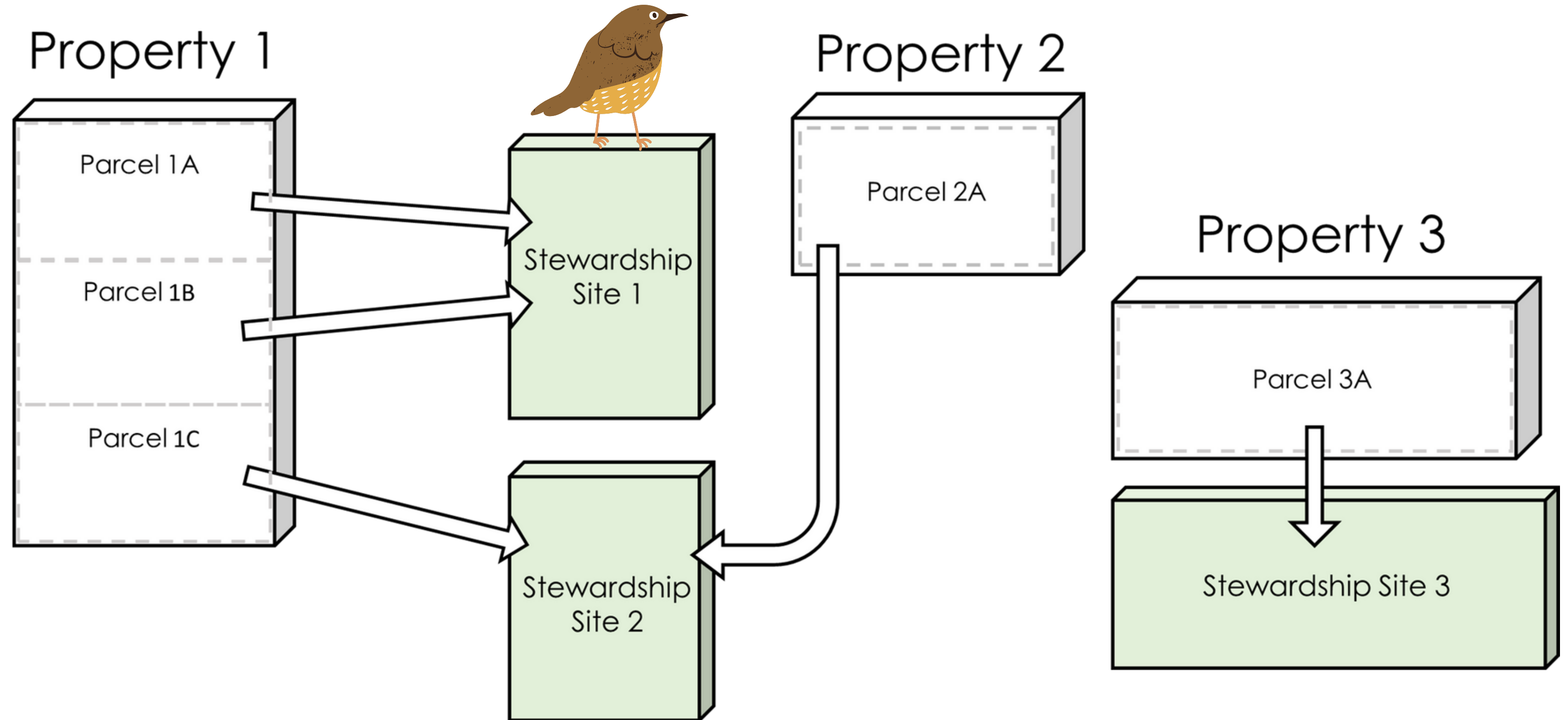
Parcel

Stewardship Site

Properties, Parcels, and Stewardship Sites: Organizational Structure

Landscape Record Types

Project Design
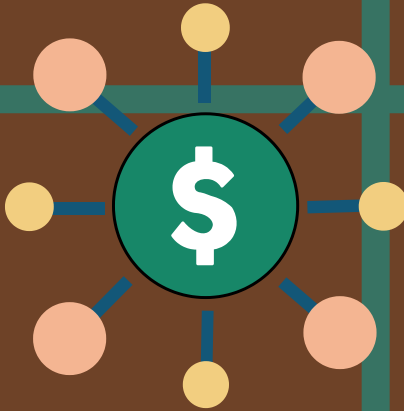
Goals	Tasks	Assignments	Timeline	Budget
Units of a Project; a particular set of tasks and budgets related to something you are trying to accomplish.	Track what needs to be done, by whom, and by when. Components of checklists; view/edit also within the timeline feature.	Tasks can be assigned to individuals with deadlines, with the option to generate notices and alerts.	Visualize expected and completed project goals and tasks over a timeline with specific dates and/or ranges.	A list of items with costs and a particular cost category (used to match future expenses to your budget lines.

Landscape Record Types

Funding Design

Sources

A source of funds that you rely on regularly. (e.g. ADFP, NRCS, DoD, County, or Internal, etc.)

Agreements

An agreement (formal or informal) for an amount of funds from a source; can involve one or more projects or properties

Disbursals

A placeholder/record for actual exchange of funds

GRANTS

Contacts & Communications

- Contacts can be associated with Properties at the Parcel level

- Communications are tracked by Contacts and/or Property

Data Collection & Outputs

Data Analysis & Products

Forms	Views	Reports
A way to ask the same questions over and over for multiple records that may have answers changing frequently (annual monitoring site visit observations); can be merged along with other data into a report	Any of the data in your account can be viewed, sorted, grouped, filtered, or queried using Views; can be turned into maps or widgets, saved or shared	Merge any data contained within Landscape into a customizable report template; can be generated for an individual record, or in bulk using Views

How Forms are used in Landscape

FORM

? ? ? ?
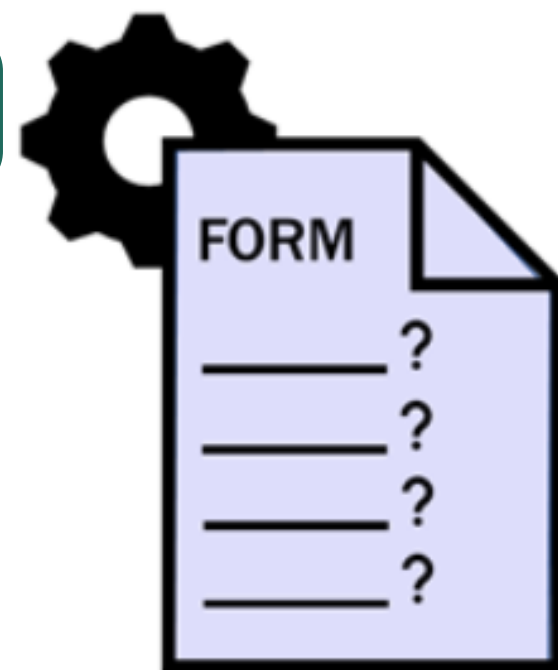
1. Build your form in settings

FORM

Did the Landowner have any feedback?
Yes – they wanted to know things.

What did you see?
□ Trees □ Flowers □ Birds □ Visiting Extraterrestrials

Does the visit require follow-up work?
□ Yes □ No
Explain:

SITE VISIT

2. Fill out the form from within a Site Visit on the Desktop or Mobile App

REPORT

Size: 26 Acres
Landowner: Leafy Greens Inc
Address: 23 One Great City
Anywhere, AK 12345

Did the Landowner have any feedback?
Yes – they wanted to know things.
What did you see?
□ Trees □ Flowers □ Birds □ Visiting Extraterrestrials

Basic/Repeatable Block

Map Block

Photo Block

Forms Block
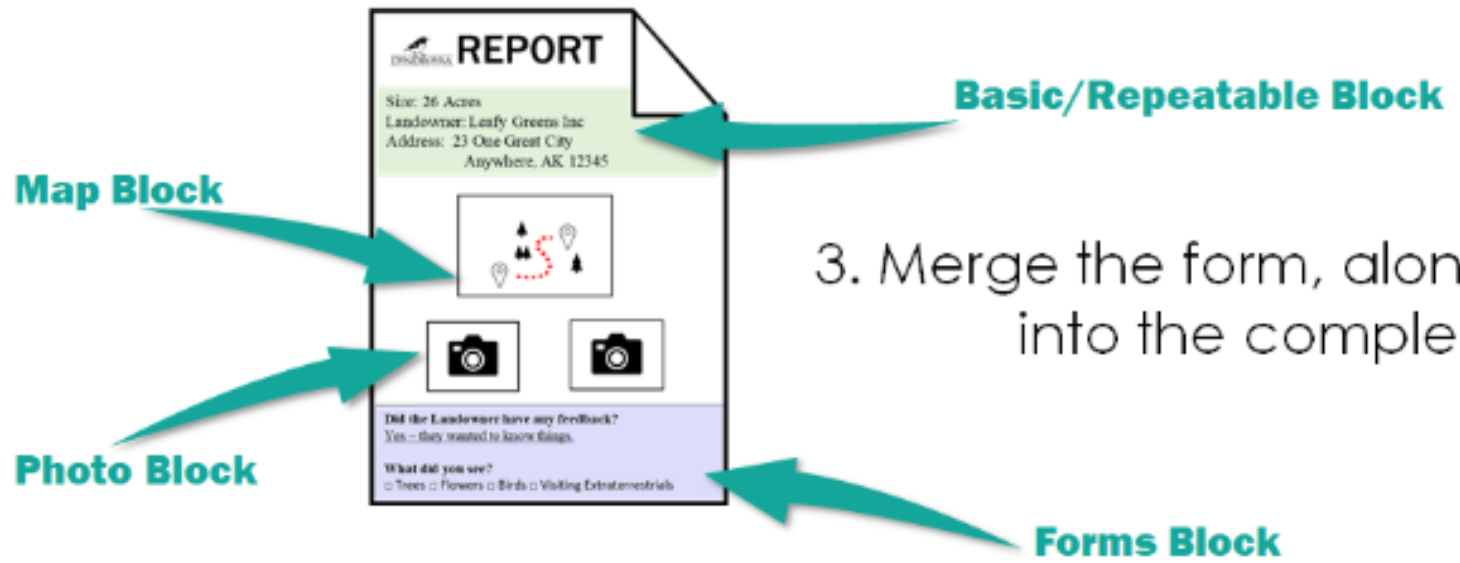
3. Merge the form, along with other data, into the completed Report

Document Storage/Assets

- **Site Assessment**
- **Appraisal**
- **BDR**
- **Contract**
- **Deed/Easement**
- **Title Policy**
- **Management Plan**
- **Survey**
- **Approvals**

Dropbox

Google Drive

CONTRACT

PLAN

Site Visits

- Navigate
- Take GPS Photos
- Track Route
- Review Documents
- See Past Data
- Fill out Form
- Map areas/points of interest--new structure or timber harvest

Mapping & Photos

- Import/export GIS data and geotagged photos
- Create points, lines and polygons from your desk or in the field
- Toggle past photos and current photos on and off
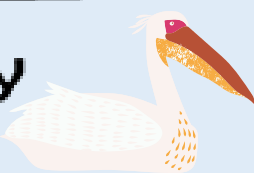- See all photos for a property in a gallery
- Link GIS layers to specific data/records (Issues, Conservation Values, etc.
- Create printable maps
- Create a public map for your website

Mapping in Landscape

Automatic Layers:
Outer Property Boundary
Outer Stewardship Site Boundary
Nearby Boundaries

Custom Layers

Watershed Boundaries
Parking Points
Basemaps*
Protected Open Space*
Parcels*

*Service Layers

Parcel Boundary

(Area Only)
Defines Area of Interest (AKA Easement
Boundary, Fee Boundary, etc.)
Defines the Stewardship Site and
Property Boundaries

Project

Project Goals
Restoration Areas
Proposed Building
Zones

Property

Site Visits
Assessment Visit Tracks
Photopoints
(Collected with the App)

Property-Specific Layers
Building Envelopes
Excluded Zones
(Recorded as part of interest)

Amendment Areas
Amendment Assets

Conservation Values
Acres of Farmland
Acres of Wetland
Feet of Shoreline
Feet of Road Frontage
Rare Species Habitat

Baseline Reports
Baseline Asset
Baseline Photopoints
Vegetation / Species

Stewardship Site

Site Visits
Monitoring Tracks
Site Visit Tracks
Photopoints
(Collected with the App)

Structures / Uses
Trails
Restricted Structures

Stewardship Site Specific Layers
Monitorable Areas
within Easement
Buffer zones

Leases
Leases
3rd Party Easements

Issues
Encroachments
Invasive Species

A Map of Landscape

Contacts

- Attorney
- Landowner
- Caretaker

Funding

Source → Agreement → Disbursal

$

Property

Details

Appraisal amount
Location
Address
Recording information

Assets

BDR
Deed
Appraisal

Property

Details

Appraisal amount
Location
Address

Assets

BD
Deed
Appraisal

Projects

Goals:

Acquire This Property

Budget:

Work—$
Appraisal —$$
Work — $$$

Tasks:

Finish BDR ☐
Acquire Deed ☐
Get Appraisal ☐

Reports

- Land Protection Summaries
- Monitoring Reports
- Printed Maps

Stewardship Site

Work

Site Visits

Forms

Status

Issues   Requests

Property
Details + Assets

Assets

Use

Structures & Uses
Leases & Contracts

Landscape MOBILE App

Views

Property 1 Use 1
Property 2 Use 2
Property 3 Use 3
Property 4 Use 4

Contact 1
Contact 2
Contact 3
Contact 4

Issue / Violation Remediation Date 1
Issue / Violation Remediation Date 2
Issue / Violation Remediation Date 3

Track and Assess Prospective Conservation Opportunities: Acquisitions

Online Demo with WLT and DLT Landscape accounts

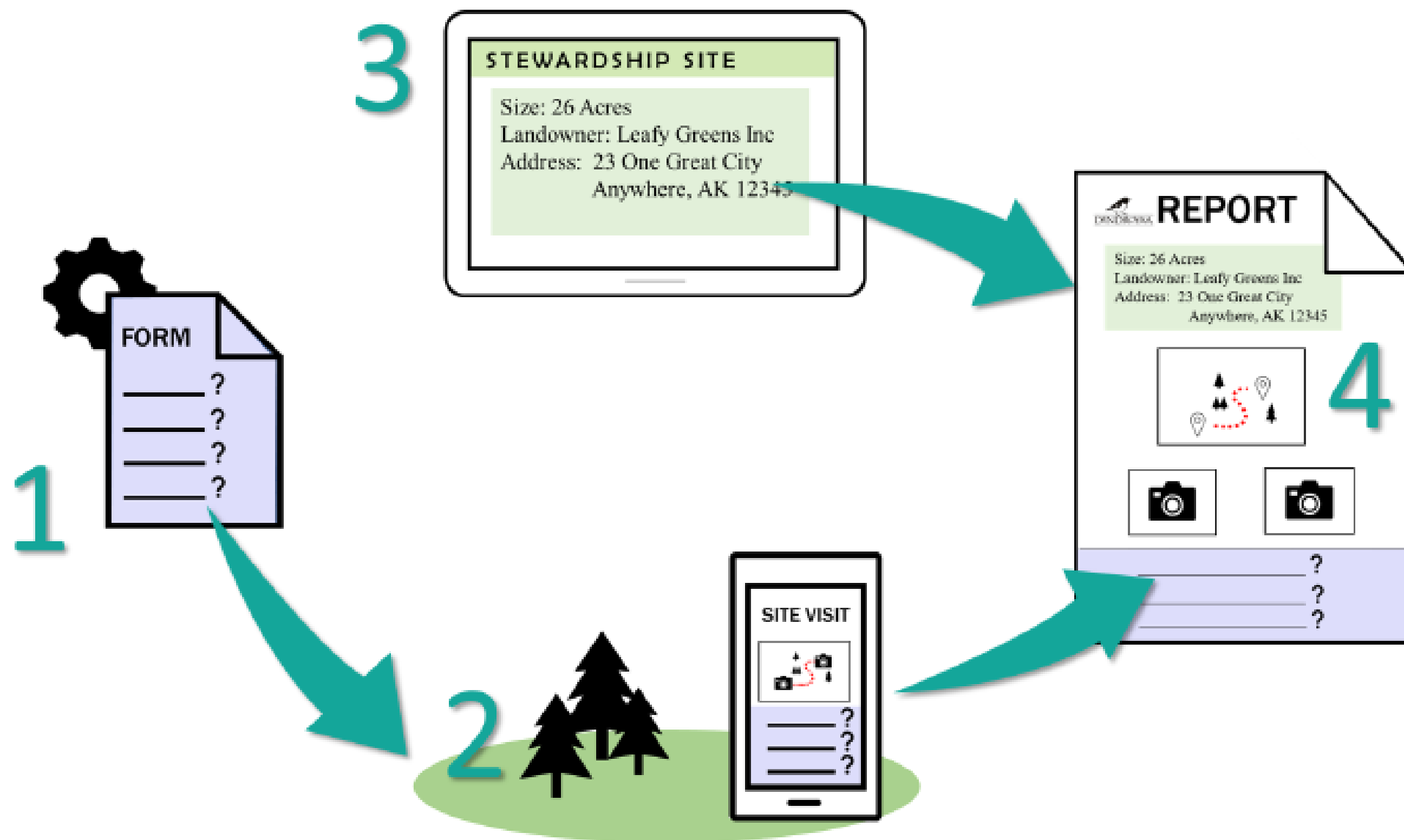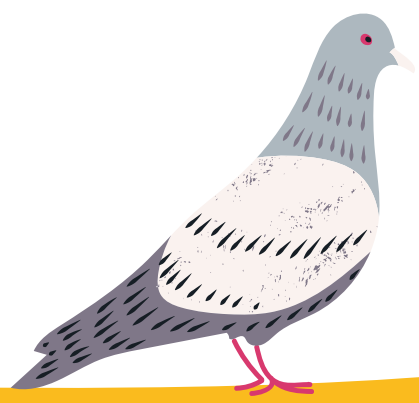**Typical Monitoring Workflow**

1 FORM

___ ?
___ ?
___ ?
___ ?

2 SITE VISIT

___ ?
___ ?
___ ?

3 STEWARDSHIP SITE

Size: 26 Acres
Landowner: Leafy Greens Inc
Address: 23 One Great City
Anywhere, AK 12345

4 REPORT

Size: 26 Acres
Landowner: Leafy Greens Inc
Address: 23 One Great City
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___ ?
___ ?
___ ?

Landscape Mobile 3 App

Landscape makes field monitoring of your conservation properties easy. Form data, geographic data, and photos can be collected on and offline and synchronized with your Landscape online subscription.

Landscape provides access to property data, current issues, prior years' monitoring data, baseline documents, and historical photos so you have a complete picture of the property you monitoring.

https://play.google.com/store/apps/details?id=com.dendroyka.landscape.mobile.v3&hl=en_US&gl=US

https://apps.apple.com/us/app/landscape-mobile-3/id1547553047

https://dendroyka.zendesk.com/hc/en-us/articles/4827088331411-Volunteer-Monitoring-with-the-Landscape-Mobile-App-video-

Knowledge Base

https://dendroyka.zendesk.com/hc/en-us

Thank you!

Questions?