A Training Demo for NC Soil & Water District Staff

Lisa Shealy, Working Lands Trust
Michael Madole, Landscape
July 14, 2022
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: Lisa Shealy
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.
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 ~7.5M acres (and counting....)
**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
<table>
<thead>
<tr>
<th>Goals</th>
<th>Tasks</th>
<th>Assignments</th>
<th>Timeline</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Units of a Project; a particular set of tasks and budgets related to something you are trying to accomplish.</td>
<td>Track what needs to be done, by whom, and by when. Components of checklists; view/edit also within the timeline feature.</td>
<td>Tasks can be assigned to individuals with deadlines, with the option to generate notices and alerts.</td>
<td>Visualize expected and completed project goals and tasks over a timeline with specific dates and/or ranges.</td>
<td>A list of items with costs and a particular cost category (used to match future expenses to your budget lines).</td>
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# Landscape Record Types

## 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

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### Funding Design

#### Sources
- ADFP
- NRCS
- DoD
- County
- Internal

#### Agreements
- Formal
- Informal
- Projects
- Properties

#### Disbursals
- 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

<table>
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<th>Forms</th>
<th>Views</th>
<th>Reports</th>
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<tr>
<td>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</td>
<td>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</td>
<td>Merge any data contained within Landscape into a customizable report template; can be generated for an individual record, or in bulk using Views</td>
</tr>
</tbody>
</table>
How Forms are used in Landscape

1. Build your form in settings

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

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
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

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

Stewardship Site
- Structures / Uses
- Trails
- Restricted Structures
- Monitorable Areas within Easement Buffer zones

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

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

Leases
- 3rd Party Easements

Issues
- Encroachments
- Invasive Species

Baseline Reports
- Baseline Asset
- Baseline Photopoints
- Vegetation / Species

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

Amendment Areas
- Amendment Assets

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

Custom Layers
- Watershed Boundaries
- Parking Points
- Basemaps
- Protected Open Space
- Parcels

*Service Layers
Track and Assess
Prospective Conservation Opportunities: Acquisitions

Online Demo with WLT and DLT Landscape accounts
Inventory and Monitor
Existing Conservation Interests—Stewardship

Online Demo with WLT and DLT Landscape accounts
Typical Monitoring Workflow

1. Form
2. Site Visit
3. Stewardship Site
4. Report
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 are monitoring.


Thank you!

Questions?