

# *The Santa Fe Conservation Trust*

## MONITORING PROCEDURES

### Review Materials

- Directions to property and ownership information
- Conservation Easement (specifically: *Recitals, Purpose, Affirmative Rights of Grantee, Prohibited Uses, and Reserved Rights* – particularly *building envelopes and restrictions*)
- Phasing information, if applicable – ‘phasing map’ in “Maps & Aerials” section of Field Binder
- Baseline documentation, including maps and aerial photos
- Monitoring report(s) from previous years\*
- Monitoring report form for the current year
- *\*If a violation or a suspected violation was documented in the previous year’s monitoring report or if there is anything else problematic with a particular property, review the situation with the SFCT staff and obtain additional advice and direction.*

### Schedule Monitoring Visit

- Ideally, the visit should occur during the growing season, from May to October.
- April and November are acceptable months.
- December thru March should be avoided unless the property is to be monitored more than once a year.
- Properties needing additional visits may include public properties with high use, properties where the landowner will be exercising a reserved right, or properties requesting an amendment to their easement.

### Contact the Landowner

- Contact the landowner well in advance of an intended visit (preferably, in the spring via SFCT’s Annual Monitoring letter, with a follow-up phone call when necessary) and be flexible in setting a date and time for the visit.
- Encourage the landowner to accompany you on the visit.
- Review travel directions or other particulars (locked gates?) and update contact information (*mailing address & email address, cell phone numbers*).
- If landowner is not able to accompany you, inquire whether he/she has a few moments to review the monitoring report form with you. Please review the appropriate items on the monitoring form with the landowner in advance of the site visit. (e.g., current ownership or plans for sale or transfer; land use changes on property or adjacent land; any changes that have occurred to the land or buildings, natural or man-made; questions or concerns of the landowner regarding the land, easement or Conservation Trust). See SFCT’s Monitoring Report Checklist for some discussion points.

### Monitoring Visit

- Materials to bring:
  - Field Binder from SFCT
  - directions to property
  - clip board
  - monitoring form
  - pen/pencil
  - compass
  - GPS (available from SFCT)
  - Binoculars
  - camera (available from SFCT extra batteries)
  - water
  - snacks
  - first aid kit
  - rain gear
  - bug spray
  - cell phone

- Walk the property if possible. Larger properties may require motor vehicle inspection.
    - Visit all original or updated Baseline Photo Points
    - Any new building or construction? Check building envelopes.
    - Check areas with easement restrictions (prohibited uses) or those affected by reserved rights.
    - Check boundaries if possible.
  - Photos and measurements.
    - You may use digital\*\* or film technology
    - **Photograph Any Alterations on property as compared to the Baseline Photographs** – natural and human caused areas of special concern, possible violations, and anything of special conservation interest
    - Identify location **and** direction/bearing on photo log. Hand-held compass is to be used.
- \*\* *a digital camera is available for borrowing at the SFCT office*

## **Post-Monitoring Work**

### **Send a Thank You Note**

A thank you note from the steward to the landowner is encouraged. *Available at the SFCT office*

### **Complete the Monitoring Report**

- Make sure nothing on the form is left blank. If you have any questions about the items on the report form, you may contact a staff member for advice.
- Monitoring Map – submit GPS data for a GIS visit map to be completed by SFCT staff.
- Photo Documentation – assign a “photo number” and provide a description for each photo on the photo log & label each photograph with the assigned number (a photo CD with written description is acceptable).
- The completed report form with photo log should be delivered to the SFCT office (preferably by email) within 2-3 weeks of the monitoring visit.
- Stewards should keep a copy of monitoring visit documentation (at least the report).
- File monitoring report and related materials in accordance with the land trust’s recordkeeping policy

### **Submit Tracking**

- Whether or not you are requesting reimbursement for expenses, please document your time and any expenses incurred. It is important for staff and volunteers to track this information.
- Reasonable expenses such as mileage, film and photo processing are reimbursable. Mileage should be documented and submitted for reimbursement, which will be scaled to the Federal standard (currently \$0.55/mile).
- Submit a ‘Volunteer Steward Tracking Sheet’ at the same time you submit your monitoring report(s).