

Sutter Buttes Regional Land Trust

Monitoring Policy

Purpose

The Sutter Buttes Regional Land Trust (SBRLT) will perform annual monitoring for every conservation easement or in-fee property it holds. SBRLT's legal obligations are to demonstrate its "commitment to protect the conservation purposes of the donation" (26 CFR§ 1.170-A -12 c (1)). Annual visits to the property help maintain a positive working relationship with the landowner and provide an opportunity for questions and continued communication. It is also the best way to prevent violations and to discover if any violations are occurring on the property. Documenting the annual monitoring visit with a monitoring report provides a record of the property's condition and use over time. These reports can be helpful in the overall management of the property and maintaining the long-term goals of each unique property.

Timing of Monitoring Visits

SBRLT will monitor each property annually. Additional visits may be necessary if there are violations or changes being made to the property.

Qualifications for Monitors

Monitors may be SBRLT staff (Stewardship Manager), board members, or trained volunteers. Board members and volunteers must be familiar with SBRLT monitoring procedures. Training should come from the Stewardship Chair or an individual with at least 3-5 years of previous stewardship experience and/or possess familiarity with SBRLT property locations, background information, and past monitoring criteria. All newly trained monitors will participate in supervised monitoring visits with experienced staff before conducting monitoring visits on their own.

- a) The Stewardship Team shall be trained in the procedures to complete a site visit.
- b) All stewardship team members will be First Aid and CPR certified.
- c) At least one stewardship team member should be knowledgeable in site flora and fauna to properly identify specimens in the field.

Pre-Monitoring Visit

1. Select the monitoring team for each project site and coordinate schedules by telephone or electronic mail.
2. Arrange the time and date of the annual monitoring visit. Schedule the visit for a time of the year appropriate to the site (for example, summer is better for agricultural sites when soils are not too soggy, but fall and winter are better for forest sites due to increased visibility). Landowners should be contacted 2 weeks prior to any site visit. Landowner

Practice 11C: Easement Monitoring

Practice 12D: Monitoring Land Trust Properties

contact may be by letter, phone call or email. Once the time and date are set, a written record of that confirmation is placed in the property project file. Landowners will be encouraged to accompany the monitors during the visit.

3. Prior to each site visit, monitors should complete the following:
 - a) Review baseline report and background information prior to the conservation easement site visit.
 - b) Load charged GPS unit(s) with property boundary, photo points and other relevant data.
 - c) Print pertinent Aerial and/or USGS topographical maps with clearly defined boundaries.
 - d) Print "Inspection Report" sheet to fill out while monitoring the site.
 - e) Bring a copy of the deed if the team plans on meeting with any landowners or agencies.
 - f) Bring a camera and back-up batteries.
 - g) Bring pen, paper, clipboard, and measuring tape.

During the Monitoring Visit

1. Arrive on time and make introductions. Preferably, the landowner will accompany the monitors.
2. Make contact with the landowner, either on-site or by email/phone to confirm existing conditions, potential violations and changes to the property. While interacting with landowner(s) and monitoring the site, special attention should be given to the following items:
 - a) Any changes to land since last monitoring or contact?
 - b) Any plans to sell or transfer the land?
 - c) Any management issues or concerns?
 - d) Any new management activities, construction, or buildings anticipated?
 - e) Any significant changes to the land from flooding, weather, animal or insect damage?
 - f) Any problems with recreational uses by the public (if allowed)?
 - g) Any activities by neighbors that could potentially encroach upon your land?
3. View all parts of the property covered by the conservation easement. Visit areas of concern mentioned in previous monitoring reports and new construction sites and areas with special easement restrictions or reserved rights.
4. Using the baseline documentation report as a guide, visit GPS photo-points and take new photos for comparison of natural or human-made changes that may have occurred. Also photograph and measure (if appropriate) potential violations of the easement. Record GPS points and map locations of changes and of any new photo points taken.
5. Record comments or questions that the landowner has about the property or the conservation easement.

Practice 11C: Easement Monitoring

Practice 12D: Monitoring Land Trust Properties

6. Thank the landowner for their time and inform them that they will be receiving a letter notifying them of the status of the easement.

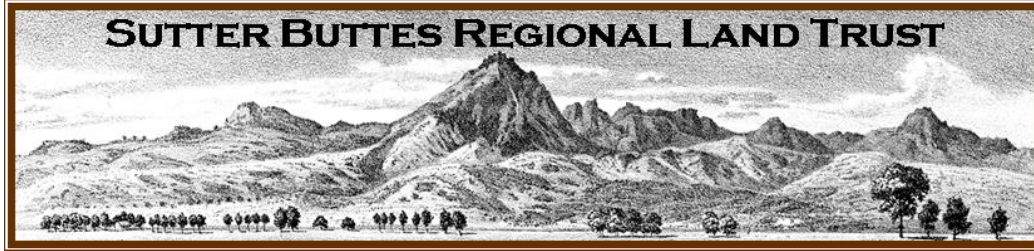
Post-Monitoring Visit

At the end of each site monitoring, the Stewardship Manager shall complete a report of all collected data and photos and save an electronic version and a paper copy in the appropriate binder. The final stewardship report and findings will then be presented to the Board of Directors for review and action (if necessary). In the case of a conservation easement violation, the Stewardship Manager, Stewardship Chair and Executive Director or Board President/CEO shall discuss and notify the Board and landowners, as needed to resolve issues quickly.

A post-monitoring letter is sent to the landowner advising them of the results of monitoring (whether the easement is in compliance or not). The letter advises that monitoring reports are provided at the landowner's request.

A hardcopy of the monitoring report is filed in each project binder and the original, signed copy is kept in a water and fire-proof safe. Digital copies should be kept in the Stewardship Monitoring project folder, filed by monitoring year.

See attached "Conservation Easement Property Monitoring Report" form. This form may be periodically updated. An alternate form for in-fee properties can be located in the "Stewardship Monitoring" folder, under "Forms and Templates".



Conservation Easement Property Monitoring Report

Property Name: _____ **Monitoring date:** _____
Location: _____ **Start Time:** _____ **End Time:** _____

Monitoring team and others present (note role in parentheses):

Note: Please use back of form for additional comments on each section.

Were landowners notified by staff for the inspection? Yes No
Date Notified: _____

Were landowner(s) invited by staff for the inspection? Yes No
Did the landowner accompany staff during monitoring? Yes No
Did the landowner provide any property information or updates? Yes No
(Note landowner name and any interaction)

Describe the route of travel (include a map showing the route you traveled this year; note that unless the route gives the ability to view the entire holding, the route should vary annually to ensure the entire property is monitored):

Describe current land use:

Note any natural alterations to the property since the last monitoring visit and attach maps, photos, illustrations, etc.

Practice 11C: Easement Monitoring

Practice 12D: Monitoring Land Trust Properties

Note any human alterations to the property since the last monitoring visit and attach maps, photos, illustrations, etc.

Is there evidence of trespassing or other continuous issues of management? Yes No

Describe:

Present property use consistent with deed restriction/management plan? Yes No

If no, describe what you observed:

Describe visible uses of the surrounding property:

Are all boundaries clearly marked as documented in the management plan? Yes No

If no, please explain:

General observations and notes (wildlife, plants, weather, etc.):

Practice 11C: Easement Monitoring
Practice 12D: Monitoring Land Trust Properties

Stewardship Program Manager signature _____ Date: _____

Name of Photographer(s):

Names of GPS Collector(s):

Attachments (indicate the number of each type, **date and label each attachment**):

Photographs:

Maps:

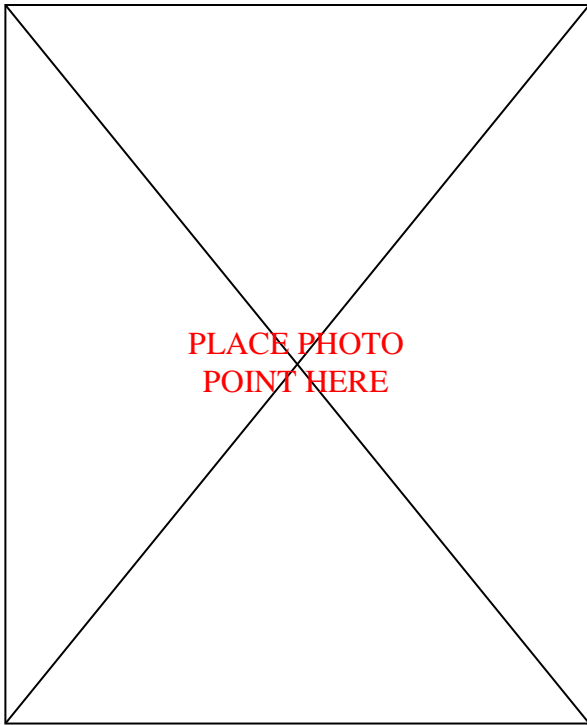
Illustrations:

Other (describe):

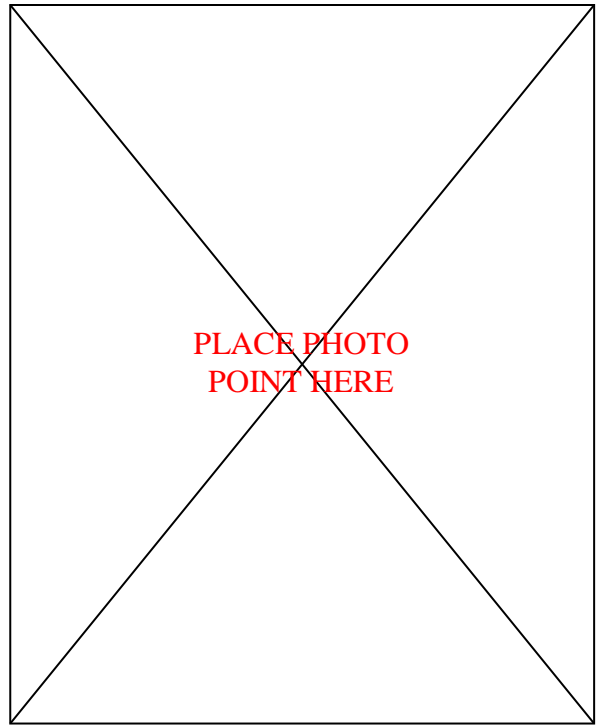
Return all original forms and attachments as soon as completed to the office of:
SUTTER BUTTES REGIONAL LAND TRUST
750 Bridge Street, Suite A
Yuba City, CA 95991

Practice 11C: Easement Monitoring
Practice 12D: Monitoring Land Trust Properties

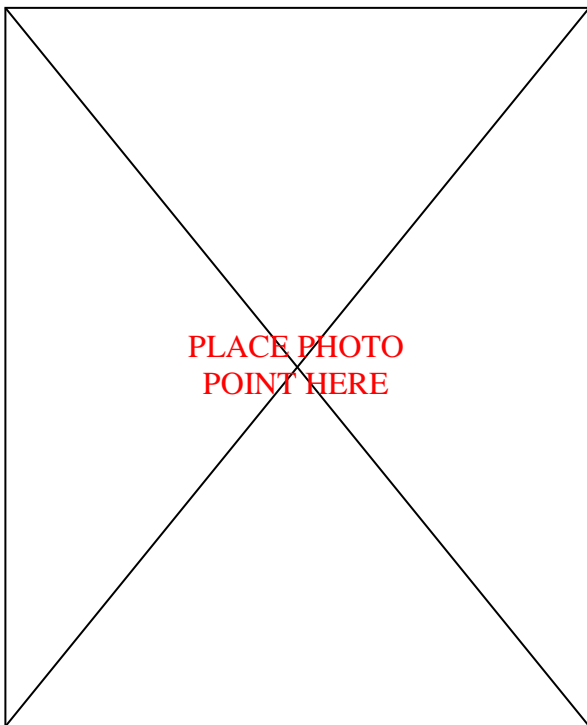
YEAR Monitoring Photos



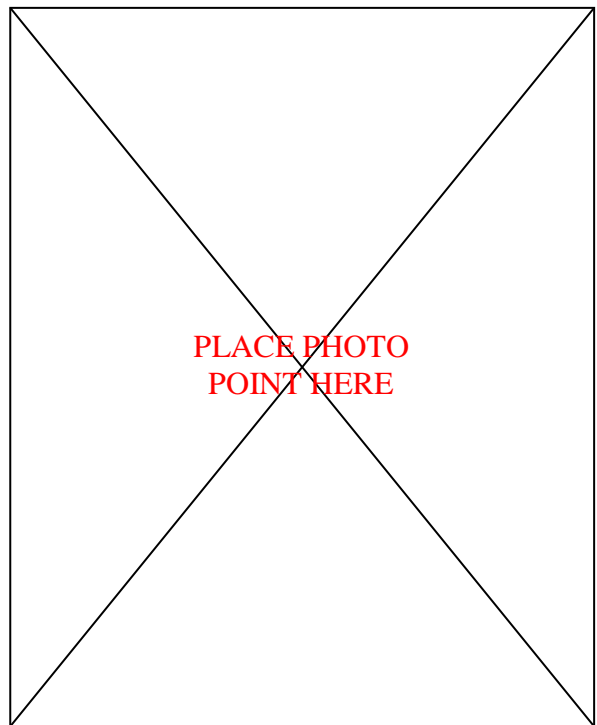
**PHOTO POINT LABEL AND
DESCRIPTION**



**PHOTO POINT LABEL AND
DESCRIPTION**



**PHOTO POINT LABEL AND
DESCRIPTION**



**PHOTO POINT LABEL AND
DESCRIPTION**

Practice 11C: Easement Monitoring
Practice 12D: Monitoring Land Trust Properties

YEAR Monitoring Map

