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Recommendations for the Growth and Development of the Androscoggin Land Trust's Volunteer Stewardship Program

Community-Engaged Research in Environmental Studies
Bates College

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December 12, 2013

Executive Summary

Our role in the growth and development of Androscoggin Land Trust's Volunteer Stewardship Program was to provide research analysis on outreach, training, and data management from effective programs in other Land Trusts in order to help the program grow. We focused our research on the overarching goals of stewardship and monitoring, volunteer outreach (recruitment, retention, and recognition), types of volunteer training program, and methods of recording and storing volunteer-produced data.

In this report we detail the steps we took to create tangible suggestions for immediate and potential changes to the program through the research of primary literature, volunteer surveys, interviews with stewardship directors, and online data. In order to be able to tailor our suggestions to specific aspects of the program, we established a firm understanding of the current program then looked at findings of effective and non-effective volunteer programs at other land trusts with similar acreage and community stature.

We found that many land trusts rely heavily on volunteer programs for stewardship, outreach efforts, and community-engagement. Volunteers tend to be in an older age demographic (working or retired) due to having more economic stability and available time to spend time on the property. Inputting training effort to maximize standardization of stewardship and retention, communicating regularly and recognizing volunteers, and keeping track of all volunteer efforts are crucial pieces of effective volunteer programs. Supplying accessible information for current and potential volunteers/members on the website was also a beneficial effort for attracting volunteers and keep up communication online.

Volunteers are motivated by a variety of factors and feel comfortable with different aspects of stewarding, so increasing opportunities for volunteers to train may draw in a wider variety of volunteers. Recognizing current volunteers is extremely crucial, as volunteers act as ambassadors in the community on behalf of the land trust. Some land trusts communicate more than others using electronic forms or paper forms. While there does not seem to be one form that is more effective than the other, to reach out

to younger potential volunteers and established groups increasing electronic communication may be the next direction for the land trust.

Table of Contents

Executive Summary	2
Table of Contents	4
Lists of Tables and Figures in Text	5
Tables	
Figures	
Introduction	5
Methodological Approach	6
Understanding the program	
Surveys and Interviews	
Further research	
Results and Discussion	9
Surveys	
Survey 1 - Training feedback and motivations	
Survey 2 - Stewardship experience	
Interviews	
Materials	
Technology	
Outcomes and Implications	17
Next Steps	18
References Cited	20
Appendices	22
Appendix A: Literature review	
Appendix B: Detailed methods	
Survey 1 questions	
Survey 2 questions	
Interview protocol for Directors of Volunteer Stewardship Programs	
Land trusts interviewed	
Appendix C: Supplemental Results	
Tables	
Figures	
Summary of coded survey 1 data	
Summary of coded survey 2 data	
Summary of coded interview data	
Appendix D: Materials	

Lists of Tables and Figures in Text

Tables

1. Selection of quotes from Survey 2

Figures

1. Example of volunteer structure flow chart
2. Cycle of volunteer stewardship for effective recruitment and recognition

Introduction

The Androscoggin Land Trust (ALT) was formed in 1987 to save over 1900 acres in Turner, ME (Androscoggin 2013). By 1991 they gained 501(c)(3) status and were able to legally accept tax-deductible donations of easements and formally become a private non-profit. To this day the membership-supported organization conserves over 4,850 acres of land located within the Androscoggin River watershed, manages 10 miles of riverfront, and is in the process of acquiring an additional 1300 acres in Jay (Androscoggin 2013).

The Androscoggin Land Trust has developed a Volunteer Stewardship Program to utilize community members as volunteer stewards for all land parcels in Androscoggin County. Stewardship may be defined as taking care of land conserved through a land trust. This includes legal responsibilities such as: annual monitoring, maintaining owned “fee” properties, keeping records of land use, and maintaining good relations with landowners, users, and donors (Auger *pers. comm.*). To meet the requirements of stewardship, a land trust often utilizes volunteers to manage a variety of ecological and social activities.

Currently, the volunteer stewardship program consists of 46 volunteers but ALT is looking to build the program to approximately 100-150 volunteers, as well as suggesting these volunteers become members (not-required). Monitoring/stewarding a property consists of two or more required visits per volunteer annually and an initial training session. Michael Auger, the stewardship director, assists each volunteer with their first walk-through of the property. A field report is filled-out and submitted electronically to the stewardship director by each volunteer. After the second successful year, the land trust is interested in expanding its stewardship program to include more trainings (general and

specialized), consistent communication with volunteers, higher levels of outreach, propaganda, and efficiency for data collection and management.

Our project aims to provide the volunteer steward coordinator with materials and suggestions on how to improve the program, focusing on a number of areas within the program to direct our research goals. The overall development of the program will support the Land Trust's long-term initiatives to:

- a) Bring more people in the community to work with ALT and fellow community members (i.e. landowners, fellow/potential volunteers);
- b) Abide by the requirement to monitor conservation easements and the land trust's decision to monitor fee lands as well;
- c) Engage more local constituencies with ALT and their various programs (for single and/or recurring events, with local environmental groups and businesses, etc.); and
- d) Improve training and other existing structures for volunteer management, such as data collection/submission, recruitment, retention, and recognition.

We hope to contribute to these initiatives by researching how other land trusts are growing, retaining volunteers, providing support (communication, recognition) and outreach for volunteers in order to implement effective programs.

Methodological Approach

Understanding the program

In order to make informed suggestions about the training and to get a better sense of the program as it stands, we tried to experience the training process a volunteer goes through in order to become a steward. This involved attending both on-site and off-site training. For off-site training, we met with several volunteers and Mike at the Hilton Garden Inn. On-site training required meeting at an ALT-conserved property in Greene, ME and walking the property with Mike and another volunteer to identify boundary markers, pick up trash, and spot violations or potential violations.

Surveys and Interviews

Throughout our project we administered two surveys and conducted five interviews that served distinct purposes elaborated below.

Survey 1

This survey took place immediately after volunteers received their off-site monitoring training at the Hilton Garden Inn, Lewiston, ME. One purpose of this survey was to learn about the volunteers who drive the stewardship program. From this survey we tried to understand volunteer motivation, gather information about the efficacy of the training session, learn about perceived challenges the volunteers had leaving training, and get some possible suggestions to start. The volunteers provided useful feedback that sparked ideas for future suggestions that could be used to strengthen the stewardship program. In total, 13 volunteers completed the survey. However, it was not completed by all of the stewards (13 of 46) and may therefore have limited application. The stewards who attended training likely feel strongly about the training and the program, perhaps more so than those volunteers who did not attend, making their results abnormally positive. Finally, this survey was completed by both veteran and new volunteers who contributed to the range of feedback. A full list of questions from this survey can be found in Appendix B.

Survey 2

The second survey was conducted using SurveyMonkey and sent to all volunteers in an email by Mike Auger. The purpose of this survey was for us to learn about how volunteers felt about the actual monitoring process and procedures. Having finished their tasks as a steward of ALT, we wanted to know if they felt prepared for the job, if they found the monitoring report to be straightforward and easy enough to complete without concerns, if their general sense of the program was positive, and if they had any future suggestions for improvement. This survey was answered by fourteen people. One limitation to this survey is that it was only administered electronically, so volunteers without internet or email access were unable to participate and once again had only 13 of the 46 volunteers respond. A full list of questions from this survey can be found in Appendix B.

Interviews (5)

We conducted a series of five interviews because we wanted to learn about each land trust beyond the information published on their website. Each land trust was chosen deliberately: the Allegheny Land Trust was suggested by ALT and the other four we picked using the master list - Table 3 in Appendix C - using a set of criteria, as follows. By interviewing urban, rural, and a combination of urban and rural lands that were fairly close in size to ALT, we were able to hear different techniques to address the distinct challenges that accompany having vast acreage (rural) and an urban setting. All of the land trusts that we conducted interviews with were similarly staffed to ALT in terms of full time and part time employees with the exception of one land trust which had considerably more staff members. Excluding this one land trust, all of the groups we spoke with had similar sources of funding for their stewardship programs (grants and membership fees) as the Androscoggin Land Trust. However, the land trust that had considerably more resources than ALT had some very progressive practices that could be something for ALT to work towards. These surveys generated the bulk of our data and we were looking to find first hand information about specifics of how each stewardship program (models, practices, what the volunteers do, who the volunteers are, etc), the tasks of a steward in their program, how to become a volunteer, volunteer training, data management, monitoring report, and successful/unsuccessful recruitment strategies.

Further research

In addition to surveys and interviews, we conducted academic research of primary literature to strengthen the credibility of our suggestions on volunteering, communication, and stewarding. A full review of this literature can be found in Appendix A.

We searched online to determine the online presence of various land trusts. Our searches were random, not targeting a specific type of land trust (urban or rural, large or small, coastal or inland, etc.) but we did record information about type, year founded, main goals, how properties were obtained, and more. The main goals were to find: how can volunteers and interested parties communicate with the

organization over the Internet? what role does social media play, if any? We determined if the website had an accessible volunteer interest form, volunteer monitor submission forms, volunteer testimonials, and other criteria. The table of this compiled information can be found in Appendix C, Table 3.

We sent out a standardized email to 46 land trusts from across the nation requesting materials on volunteer training, interest forms, and anything else the land trust could provide, if they were willing. We chose land trusts to contact based off the list of accredited land trusts by the Land Trust Alliance (one organization per state, if represented) and based off of suggestions made by interviewed land trusts. Our initial research of an “online presence” educated our requests for certain types of materials. In addition to asking for materials, we also printed out information that was accessible on the website of any land trust that we compiled information for in the master table. The materials (Appendix D) were then analyzed for general themes (e.g. similarity between strategies used by trusts with like characteristics, specific strategies for training, etc.).

Results and Discussion

Surveys

Survey 1 - Training feedback and motivations

Most volunteers found the training to be helpful (7 on a scale from 1-10, with 10 most helpful) and felt prepared for their monitoring tasks. We found that most volunteers highly valued the ALT’s mission and conservation values; several volunteers wanted to learn more about how their work monitoring relates to broader ALT goals and how it benefits the organization. Including more information about the value of monitoring would give the volunteers a greater sense of importance, recognition and passion for the work they are doing. Another suggestion was to include visuals to make the training more engaging. When asked why volunteers are monitoring and what was motivating to them they responded persuasively. Across volunteers we found the following themes: the desire to get outside/be in nature walking around, a sense of care for the environment, and conservation values for beautiful landscapes. These themes could act as selling points to list when recruiting volunteers through various forms of

outreach (Wilson 2000). Additionally, volunteers said they sensed the work they were doing was very important and wanted to give back to the community. Volunteers seemed confident in their ability to monitor the land and did not perceive the task as difficult; however, several volunteers expressed concern about contacting the landowner and finding a time to meet. This concern could easily be addressed and alleviated during monitoring training by role playing what the conversation may sound like or drafting a script the volunteer could read. Due to the high level of enthusiasm and passion in the volunteers, we saw that most of the volunteer's first suggestions were about outreach through a variety of mediums such as newsletters, functions, recreational programs, website improvement, etc. It was affirming (Costa *et al.* 2003) to see that these volunteers expressed the same desire to align goals and expand the program as Mike does.

Survey 2 - Stewardship experience

The second survey yielded a 100% positive response when asked if willing to volunteer again, and everyone except one person said they were willing to recommend the program to a friend. The number of hours spent on the preserve varied greatly between individuals, in part because some volunteers had more than one property and others had larger properties. Additionally, some volunteers are new this year, which may result in more hours spent on the parcel than more familiar volunteers.

One volunteer mentioned the corporate work-days held by Tambrands and Walmart, in which hundreds of volunteers helped with trail maintenance. This is a direction we encourage for ALT; other land trusts (see interview results, below) and the literature review (Appendix A) suggest corporate work days are just as effective as short-term volunteer efforts (with potential for further volunteer commitment).

Responses to the question, "What did you find most difficult about volunteering?" were most frequently (half of the responses) about lack of time to go out and/or spend enough time on the property to complete the monitoring form in full detail. Two of fourteen noted unclear boundary markers as most difficult. There were a wider variety of responses to the question about rewarding experiences (Table 1). These quotes represent a variety of the appeals and motivators of volunteer stewarding, individually and

in combinations: social, intrinsic, political, environmental, giving back to the community, a sense of empowerment, and others (Wilson 2000).

We would like to emphasize a couple of suggestions found in response to the questions “How would you like to see the stewardship program improved?” and “Any other questions or comments?” Three volunteers called for more communication between the land trust and volunteers as well as between the volunteers themselves; another volunteer asked to have more clarification on the short- and long-term goals of the organization while someone else requested overall more consistency and organization. These requests align with the literature on organizational structure and effective communication methods between the organization and the participants (Costa *et al.* 2003; Alexander and Hess 2012). One person requested more volunteers in order to have more than one volunteer assigned to each property. This recommendation vindicates our efforts to develop suggestions for growing and developing the program.

Table 1. Volunteer responses to the question: “What do you find most rewarding about the stewardship program?”

Volunteer A	Volunteer B	Volunteer C	Volunteer D	Volunteer E
“To get off the beaten path and really ‘feel’ the land.”	“Meeting new people with similar interests.”	“Seeing the city of Auburn address problems at my site after I gave an assessment.”	“Just being there and being part of an organization that works to make sure these properties are set aside.”	“Knowing I was helping keep a place clean so others could enjoy the trails.”

Interviews

In general, all of the land trusts we interviewed had two types of volunteers in their stewardship programs. The first type of volunteers is the regular “base” of volunteers who have undergone monitoring training and perform traditional stewardship tasks. The second kind of volunteers is members of otherwise unrelated groups working with the land trust on stewardship as a one time event or clean-up day. The land trusts we interviewed worked with organizations such as local colleges, high schools, corporations, Girl Scouts and Boy scouts. Due to the fact that land trusts had a number of one time

volunteers who were not entered into their databases they found it worthwhile to track the number of instances that any volunteer worked on a land trust property.

Tasks that monitors performed varied based on the location of the property. Urban properties were monitored more frequently, weekly at most, and these properties required more trash removal and dealing with land abuses. Rural and larger properties were visited once a year and volunteers would perform standard tasks such as walking the boundaries and noting any land abuses. The one large difference we found between these practices and those of ALT are that most, four of five, land trusts we interviewed said that their monitors identified invasive species, noted their presence and location on their monitoring form and in some cases dealt with the invasives. At times the work with invasives required additional support (questions about identifying etc.) from the stewardship directors.

To standardize performance of the duties of stewardship, volunteers underwent a basic stewardship training. In all of the organizations the training occurred annually and the basics of how-to-monitor were taught inside (off-site). All of the land trusts with larger parcels of land -- in acreage -- taught the monitors how to read a map and use a compass. Many of the land trusts taught basic knowledge about invasive species. Following the training basics taught inside, there was an onsite or mock monitoring session led in smaller groups. In addition to these common training procedures, several stewardship programs offered additional training. For example, one land trust partnered with local environmental groups to offer a variety of trainings that included everything from wildflower, mushroom, and star identification (the more “social” trainings) to specialized invasive removal and tree/shrub planting. In general, these trainings helped to satisfy the eager stewards, who really wanted to learn more and further care for their land parcels, as well as the stewards seeking a social outlet from the program. Additionally, we heard of leadership training in which existing volunteers have the option to attend an extra half-day event to become “crew leaders” at larger volunteer work days. Finally, we learned that stewardship directors use training events to learn more about their volunteers and their interests and aspirations which helps them determine what parcel of land is the best fit for any given volunteer.

We found it hard to draw conclusions about the most common monitoring forms because a wide variety of forms were used. Often times the format of these reports changes every few years. Some forms are highly narrative and others are very categorical with cards and boxes to check. The efficacy of the monitoring report depends on the property, the program and the broader goals of the stewardship program. Most programs were very content with their monitoring report sheets; however, it seems that most programs have struggled to manage this data electronically. Two stewardship directors reported using Microsoft Access and were mostly satisfied with the program. One interviewee was very enthusiastic about a new program called Total Community Manager because she can import documents, deeds and surveys, and organize a master database of all of volunteer hours and donations. However, even with these systems in place directors still seemed frustrated with the accessibility of these programs.

We found the model used at the Allegheny Land Trust (Fig. 1) to be very applicable to the Androscoggin Land Trust. At the Allegheny Land Trust there are two types of volunteers: corporate/group and independent. **Corporate/group** volunteers are individuals who are members of larger pre-established groups eg. firms/businesses in the area, local high school and college groups, girl scouts/boy scouts, etc. These volunteers receive a safety briefing and only minimal training. They are instructed by ‘crew leaders.’ The Allegheny Land Trust uses these volunteers to “get things done quickly because our corporate volunteers are a massive amount of people” (Rzotkiewicz, Appendix C). The land trust has a master list of properties and jobs so these volunteers can be put to the most effective use. Finally, the land trust finds these group/corporate volunteers effective because “you only have to talk to one person to get 50 people,” thus making this an effective model. The other type of volunteers at the Allegheny Land Trust are **independent volunteers**. These volunteers undergo complete monitor training and comprise the volunteer base. Independent volunteers adopt a parcel of land that they may visit multiple times a year and know their responsibilities. Unlike the group volunteers, independent volunteers are in active communication with the land trust and may touch base multiple times per year. Individual volunteers either manage a premier property or a green space. **Green spaces** can be larger properties without trails and can be more difficult to monitor (more rural). **Premier properties** have many

volunteers and make a real impact on the property. The goal is to make premier property space a “gem” or an example of what can be done with a lot of volunteer time. Volunteers on these spaces focus on invasive species removal and these properties are often clearly marked with land trust signage so the work of the land trust is clear to the community.

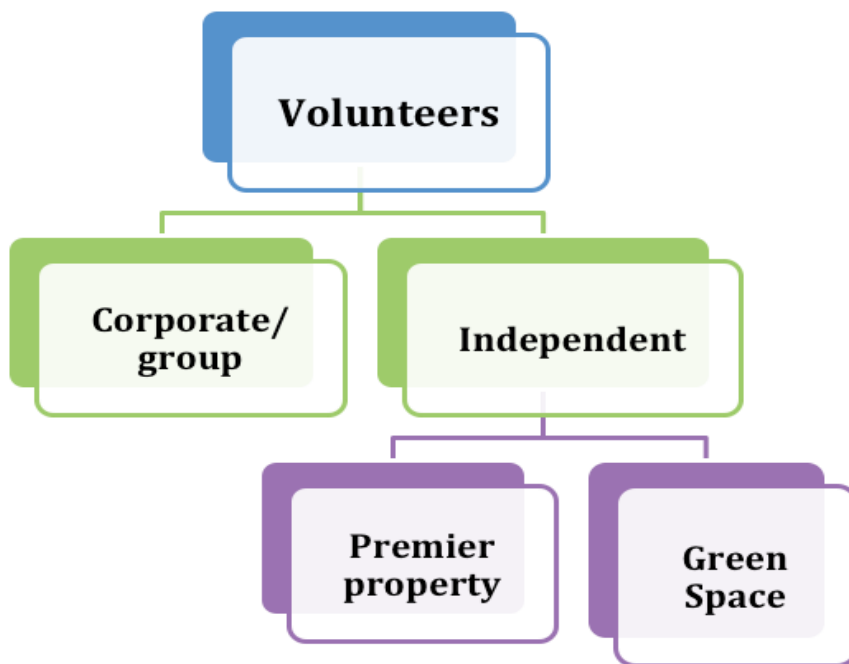


Figure 1. This diagram shows the model for stewardship at the Allegheny Land Trust. There are two types of volunteers, corporate/group and independent. Independent volunteers are stewards of either premier properties or green spaces.

We quickly recognized similarities across the five land trusts we interviewed. Stages of monitoring and program development (Fig. 2) was something that **all** five interviewees referred described. Volunteers who are interested in stewardship begin the cycle by finding a land trust. The land trust websites (all five interviewed) have accessible **volunteer interest forms**, directly on their websites that link to an email or file into the website system. Volunteers complete the form and are contacted by stewardship directors about volunteer training. Next, volunteers monitor their properties, complete the monitoring report, and return it to their land trusts. Once volunteers finish these tasks, the land trusts (all 5 we interviewed), land trusts have an event or means of **volunteer recognition**. Volunteer recognition consists (all 5 we interviewed) of one or more of the following: social gathering for all volunteer stewards, small gift/token

of appreciation (eg logo items, pocket invasive species guide), praise/mention of individual volunteer’s contributions, and/or personally thanking them. The thinking is that once volunteers complete the monitoring and are personally recognized by the land trusts they will feel loyalty to the land trust or pride in the work they did and act as ambassadors for the stewardship program. Once the stewards/ambassadors speak about the program to people they know and their involvement, some of these other volunteers will become interested and new volunteers will enter the monitoring cycle.

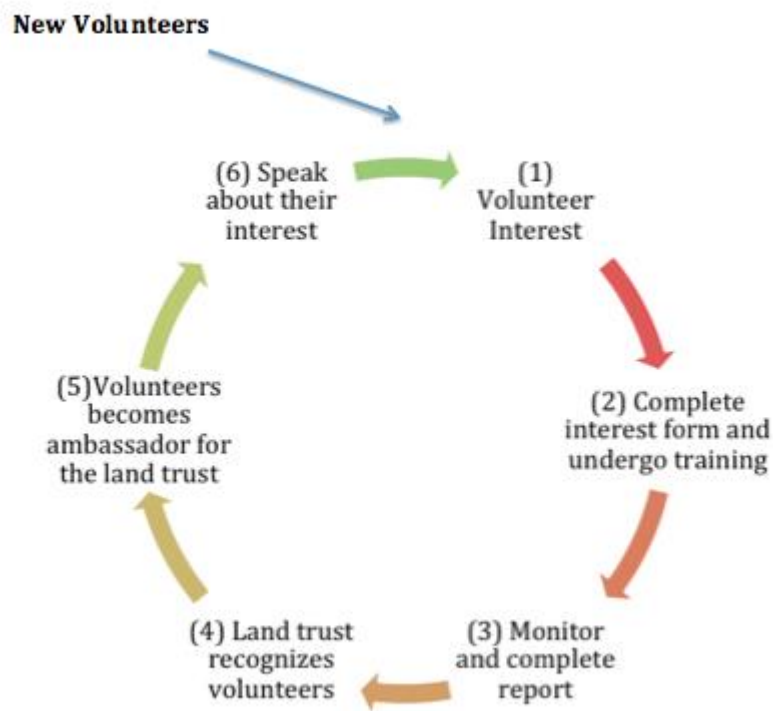


Figure 2. Phases of stewardship and recruitment in a volunteer stewardship program. This diagram represents the process of volunteer stewardship and shows why the more passive word-of-mouth/ambassadorship model is a common recruitment strategy.

Materials

The materials provided in Appendix D are a collection of various documents used by other land trusts (see Appendix C Table 3) to either facilitate effective monitoring of land parcels by volunteers or recruit/train volunteers. The approach land trusts use for monitoring varies, but similarities are found

between trusts with similar attributes. For effective recording, the larger easements used standardized forms with check boxes to note changes to the property (see LTT, VOF, EVLT) (Appendix C Table 2), only asking for a more detailed description when a change was present. Photographic evidence was also incorporated into larger land trust monitoring processes. While each land trust that used photographs (VOF, EVLT, LTT) differed in the submission protocol, each used photographs taken by the volunteers to document violations on land parcels. Smaller land trusts used some check box format, but for the most part relied upon the volunteer to answer questions related to property changes (see SLC, MC). The training process also depended on size. VOF requires background checks on its volunteers and includes scripts to read for interactions between volunteers and landowners. Many of the larger trusts required waivers to be signed by the volunteers. The process was more informal with smaller land trusts. Generally there were fact sheets provided about the trust and monitoring, accompanied by training in the field. The reminder sheets used by EVLT can serve as a good way to gently remind volunteers to complete their monitoring and could serve as a useful guide for ALT. Similarly, VOF's script used by the volunteer to contact a land owner can address the unease felt by ALT's volunteers (see Survey 1 results), and either be a strategy incorporated by ALT, or used in the training process. However, we do realize that ALT is interested in keeping strong contact between the organization and landowners rather than having the volunteers address the landowners directly.

Technology

Interviews and material analysis indicate that one of the largest problems land trusts face is data management. ALT currently uses a paper/binder system to record site history and changes to the land. While most land trusts still keep paper copies of documents, many use electronic management strategies. Interviews indicated the Total Community Manager is popular. It was created for land trusts and keeps track of variables such as conservation attributes, individuals interacting with property (owners, volunteers), and notes from each property visit. Other land trusts also used Microsoft Access.

In an increasingly technological society, it is crucial to have an up-to-date, interactive, engaging website (Jacobson 1999). Many land trusts have pages geared towards their volunteers. Not only do these pages detail the volunteer positions available, but are also visually oriented, showing pictures of volunteers in the field. Additionally, most websites include volunteer projects/pictures on the homepage. By having a volunteer presence online, the stewardship program gains legitimacy and serves as an outreach mechanism (Losee 1999).

Outcomes and Implications

Volunteering is a vital part of a community organization (Omoto and Snyder 1993). Volunteer stewarding is a very valued position and it is clear that Androscoggin Land Trust volunteers love what they do. We have identified a variety of motivators for volunteers, including personal values/beliefs, environmental, and making social connections. Understanding motivations of current volunteers can influence how the land trust continues to hold their interest and inspire the interest of potential volunteers. Mindful of the roles of voice, privilege and power in a community, we were pleased to find that the goals and aspirations of ALT volunteers were aligned with, if not the same as, those of Mike and the other staff members.

Volunteer recognition and constant communication are key aspects to engaging volunteers and retaining them for the long-term. Volunteer recognition may be an annual dinner, paraphernalia with the ALT logo, and/or a section of the website dedicated to volunteer efforts, testimonials, and possibly interest and monitoring forms. We define communication in a few ways: between the land trust and volunteers, between volunteers themselves, and between the land trust and potential volunteers (Losee 1999). This latter form of communication may, for example, be a volunteer interest form on the website or a booth at a neighborhood event. Building a sense of community with current volunteers is a valuable characteristic, as volunteers act as ambassadors for the organization. Their efforts, reinforced by the organization to reach individuals and established groups rather than massive outreach, has proven to be effective. That said, it is important to publish organizational accomplishments and volunteer

achievements in a weekly and/or monthly publication for two reasons; this is one form of volunteer recognition and also allows interested parties who may or may not have worked with the organization in the past to see what sort of events are happening and know that they are always welcome to get involved.

The current major demographic of ALT volunteers (generally, middle-aged working class and retirees) seems to be very successful and the most common demographic at other land trusts that we interviewed. This said, we also suggest that one-time events are a great way to engage with other types of community members such as youth groups, established community/recreational groups, and corporate (work-day) volunteers. We predict too that social media will become a more productive means of communication as succeeding generations become volunteers.

Training is an important part of volunteer stewardship and we found in the survey and interview results that the off- and on-site training sessions are an effective combination, and the property walk-around with the stewardship directly specifically appreciated. While these established practices have obtained positive feedback, we suggest the addition of visuals in the off-site training and for monitoring that an increased emphasis be placed on invasive species training. Our research did not focus on collaborating with local environmental groups for additional specialized trainings (see the Allegheny Land Trust interview results in Appendix C) but we suggest this is a route ALT could take to expand their trainings.

Next Steps

There are numerous next steps that can be taken to advance the growth and development of the Volunteer Stewardship Program. These suggestions stem from the implications mentioned in the previous paragraph, but we acknowledge that they are not the only possibilities for what to do next. We suggest developing further criteria for the monitor form (e.g. invasive species) as well as creating a volunteer interest form for the website, perhaps on the same page as volunteer testimonials. Overall, we suggest greater inclusion of the volunteers' accomplishments and schedule of volunteer events on the website and through email updates/newsletters. Furthermore, developing a recognition event that could include paraphernalia (with logo) seems to already be in the works, and we strongly agree with a seasonal event.

We recommend establishing connections with local environmental groups to provide specialized training events and expand volunteer recruitment potential. Reaching out to established groups, especially youth recreation groups, and corporate volunteer programs, can benefit work-day efforts, community engagement, and awareness for the volunteer program. Furthermore, volunteer recruitment beyond a word of mouth effort (though this is effective) may work best at community events rather than through mass outreach. There are a number of electronic data management systems for storing monitoring data (as well as total property information) and for storing volunteer information; we especially recommend Microsoft Access and/or Total Community Manager.

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Appendices

Appendix A: Literature review

Land Trusts

Land trusts are private, non-profit organizations that acquire and manage land for the purpose of permanent conservation, and steward land for public benefit (Wright 1993). They have a legal obligation to monitor land easements and preserve the ecological integrity of every land parcel, focusing specifically on sensitive natural areas, farmland, water sources, and cultural resources (LTA 2009). In 2005 it was reported that land trusts collectively protected 37 million acres in the United States (Aldrich & Wyerman 2006). As land gets developed at a rate that outpaces population growth (Hocker 2001), and community values veer towards taking on more environmental responsibilities (Mayfield *et al.* 2001), it is important to keep land trusts active in restricting development and preserving local spaces.

Land trusts work to conserve habitat, open space, and working landscapes (Merenlender *et al.* 2004). Land is acquired by purchase (fee land) or donation (conservation easement), the latter tending to be mostly voluntary and incentive-based. Properties of private land contribute a large portion of habitat critical for biodiversity conservation, thus landowners are interested in managing their land via regulatory community initiatives that are in line with the landowner's conservation goals (Merenlender *et al.* 2004).

As nonprofits, land trusts rely on donations and grants to cover operating and land acquisition costs. There are three main approaches utilized by land trusts to procure land: direct acquisition, easements, and a strategy of limited development (Elfring 1989, Hocker 2001, Sundberg 2006). Each of this will be discussed next in order to assess how different procurement steps and associated responsibilities affect management and conservation efforts.

Direct land acquisition involves buying or being given land by private and public donors. This is the simplest method of acquisition, but has the financial burden of maintenance in addition to conservation (Hocker 2001).

Conservation easements are parcels of land bound by a legal agreement between the trust and the landowner for the land to be conserved but remain privately owned and used within restrictions (Wright 1993). For instance, an owner may give up his right to build additional structures but maintain the right to grow crops. Under this strategy, the land is still maintained by the owner, but monitored for violations by the land trust.

Limited development divides a plot into developed and conserved lots, thereby retaining open space while also gaining a profit from development. The profits made from selling a section of the plot (generally at higher value because of the juxtaposed undeveloped—conserved—land) allow the land trust to purchase and conserve other parcels that may be sold at a lower price (Elfring 1989).

Additional conservation strategies by land trusts include mixed land use, such as allowing a specific organization to use the land for recreation (walking, snowmobiling, etc.) as long as degradation is prevented (M&S Landscape Architects 2010). This strategy is less common, as it requires cooperation between the landowner and organization, as well as an increased level of skilled monitoring.

Land trusts are required by law to monitor each conservation easement annually and it is preferred by the Land Trust Accreditation Commission to monitor fee lands as well. Stewards are only allowed to manage and monitor fee lands while management on easements is the responsibility of the landowners.

Ryan *et al.* (2001) suggest that management activities fall under themes, such as “native plant restoration,” “stream quality monitoring/mapping,” and “clean-up” (636). Native plant restoration usually consists of removing invasive species; this activity is especially common for group work-days. Stream quality monitoring is only used when the monitor has the skills necessary to determine water quality and is unusual in monitoring programs that are volunteer-based. General clean-up is by far the most common, as it requires walking throughout the property and picking up any trash as well as marking sites with potential violations (hunting stands, dumping sites, etc.). Ultimately, management activities are specific to the individual property and the skill level of the monitors (Van Den Berg *et al.* 2011).

Volunteering and its role in stewardship

Volunteering is any activity in which an individual freely commits time to benefit another person, group or cause (Wilson 2000). It is seen as increasingly important both by government and by individuals as a way to engage in civic society and make connections/social interactions in order to benefit a greater society (O'Brien et al. 2010). Two main theories on volunteering are accepted, one focused on intrinsic values and behaviors as motivation, the other on based on rational thought and cost-benefit analysis (Wilson 2000, Thoits and Hewitt 2001). The first theory suggests that volunteer work stems from learned motives, values, and beliefs. The second theory considers human capital (education, work, and income), exchange theory and social resources (social networks and family relations) (Wilson 2000).

More recently, volunteer work connected to well-being has opened up a broader array of theories on motivation (Thoits and Hewitt 2001, O'Brien et al. 2010). Scholars debate the precise definition of volunteering, such as whether it should not include remuneration, whether motive is a necessary consideration, and whether volunteering is synonymous with producing a public good (Wilson 2000). The activity is thought to be more formal than informal helping behavior, such as general "caring" and more individualistic than social organizing, distinguishing itself from social activism (Omoto & Snyder 1993; Markham & Bonjean 1995; Wilson 2000).

Volunteering rates in the United States are consistently stable or rising, especially in an increasing elderly subset that is looking for post-employment activities (Wilson 2000, Moen & Flood 2013). Moen and Flood (2013) introduce the "encore stage" defined as the years of later adulthood beyond career building, during which healthy individuals are free to pursue meaningful public engagement in education, paid work, and volunteering. Education, age, gender, race, health, disability, and social class are traits that either facilitate or constrain an older generation from engaging in volunteer activities. Volunteer work may either occur in tandem or as a substitute for work (Moen & Flood 2013).

Outdoor volunteering is defined as practical environmental volunteering carried out outdoors, including restoration, trails maintenance, conservation, stewardship, and creation of new habitats

(O'Brien *et al.* 2010). While volunteering generally requires a dedicated commitment, environmental volunteer activities may involve either a one-time event or involvement on a regular basis. The value of this work by volunteers "is important small scale work that would often not have been undertaken if volunteers did not get involved" (O'Brien *et al.* 2010). As other studies have reinforced (Wilson 2000, Thoits & Hewitt 2001), environmental volunteering connects to people's health, happiness, and overall well-being; specifically, this may be due to a variety of mechanisms (e.g. regular physical activity, social interactions, contribution to meaningful work) providing personal benefits (O'Brien *et al.* 2010). Rewards of environmental volunteering include "holistic benefits to participants in terms of their physical, social and mental well-being" as well as broader documented theories such as "contact with nature and the restorative benefits of the environment" (O'Brien *et al.* 2010).

Communication and goal alignment

Communication, defined most broadly, can be characterized by the following traits (adapted by Losee 1999): information transfer, processing takes place in communication systems, both the sender and the receiver are actively involved in a communication system, and quality varies.

Framing communication in the broad context of effective communication for organizations, communication channels may be formal or informal, and timing of information plays an important role in operational effectiveness (Costa *et al.* 2003).

It is important to consider how strategies of communication and creating a volunteer management structure can influence organizational growth (Nystrom 1993). Adapting theory from company practices, choosing the proper organizational structure can enhance organizational and managerial performances, which depend on "situational demands posed by the environment, technology, and organizational size." Higher performance companies employ a diversification of products (in ALT's case, this may translate to volunteer tasks), and a close alignment of management practices -- which may involve procedures, informal practices, or using quantitative tools for decision-making analysis -- with actual strategies (Nystrom 1993). Furthermore, successful managers tend to engage more in communication activities

(Barry and Crant 2000). While there is no one best model for organizational structure, the literature offers a wide array of strategies on communication channels and organizational management (Nystrom 1993; Losee 1999; Barry and Crant 2000, Costa *et al.* 2004; Alexander and Hess 2012).

Being able to measure progress towards conservation goals is important in terms of being able to communicate the results (Alexander and Hess 2012). For a land trust, developing a framework for measuring conservation goals and communicating progress can help to build approaches for environmental management, public engagement, drawing in new members and donors, and reaching out to potential volunteers (Alexander and Hess 2012).

In the same vein, aligning organizational goals with individual behaviors affects individual attitudes and effectiveness of organizational structure/managerial strategies (Costa *et al.* 2004). Attitudes of individuals within an organization are determined by interactions with others (relating to values and beliefs) and individual personality, including personal beliefs (Barry and Crant 2000; Costa *et al.* 2004). As this relates to volunteers, volunteer communication amongst individuals as well as communication with organizational directors is highly dependent on volunteer motivations and organizational structures set up to communicate goals and accomplishments to volunteers.

Monitoring is an essential part of assuring that easements are being managed effectively; however, land trusts are still challenged by monitoring and stewardship (Merenlender *et al.* 2004). Effective citizen science requires inputs by scientists and educators, followed by a shared design and implementation of activities along with outputs by both students and scientists -- or by volunteers and the land trust -- to develop deeper engagement and proof of accomplishments/an insight into the data, respectively (Zoellick *et al.* 2012). This model of logic can be applied to a volunteer monitoring program, especially to align the goals of the stewardship program with the participants (volunteers).

Appendix B: Detailed methods

Survey 1 questions

- 1) Have you done any previous monitoring?
- 2) Which part of the monitoring do you perceive as being the most exciting? Most challenging?
- 3) Do you have any recommendations on how the land trust can improve this program?
- 4) Do you feel the work you are doing is important?
- 5) Is the work and property convenient for you?
- 6) Why are you volunteering?
- 7) How effective was this training?
- 8) Any questions or suggestions?

Survey 2 questions

- 1) What did you find most challenging about the stewardship program? Most rewarding?
- 2) Did the data collection sheet cover everything you thought was important information about your property? If not, what was missing?
- 3) How many hours did you spend on the property?
- 4) How big was your property (approximately in acres)?
- 5) What helped you feel prepared to be a volunteer steward?
- 6) Would you serve again as a volunteer steward for ALT? Would you recommend volunteering to someone you know?
- 7) How would you like to see the stewardship program improved?
- 8) Any other questions or comments?

Interview protocol for Directors of Volunteer Stewardship Programs

- 1) How many of volunteers are in your program? How many members do you have? How many staff members?
- 2) Who are your volunteers and what do they do?
- 3) What is involved in becoming a volunteer monitor?
- 4) What kind of training events are offered for land monitors/volunteer stewards? Is it specialized?
- 5) How do volunteers provide feedback about the properties?
- 6) What data are collected? How are these data reported? Who uses these data?
- 7) How do you attract volunteers?
- 8) Do you provide recognition for your volunteers?
- 9) Has the land trust tried any strategies of recruitment/training/monitoring that have not worked?
- 10) How is your volunteer monitoring program funded? What are your primary sources of funding?
- 11) What programs have been most effective for your land trust's monitoring program?
- 12) Would you have any suggestions for a new stewardship program starting?

Land trusts interviewed

Table 1. Land trusts interviewed by phone. Stewardship directors gave verbal consent as approved by the Bates College Internal Review Board.

Land Trust	Contact
Allegheny Land Trust, PA	Emilie Rzotkiewicz erzotkiewicz@alleghenylandtrust.org
Greater Worcester Land Trust, MA	Colin Novick gwlt@gwlt.org
Lowell Land Trust, MA	Gwen Kozlowski gwen@lowelllandtrust.org
Ozaukee Land Trust, WA	Mike Hoffer mhoffer@owl.org
Upper Valley Land Trust, NH	Jason Berard jason.berard@uvlt.org

Appendix C: Supplemental Results

Tables

Table 2. Land trusts contacted for materials.

Land Trust	Contact Information
Allegheny Land Trust (ALT)	cbeichner@alleghenylandtrust.org
Sippican Lands Trust	info@sippicanlandtrust.org
Land Trust of North Alabama	questions@landtrustnal.org
Chippewa Watershed Conservancy	info@ChippewaWatershedConservancy.org
Sakonnet Preservation Association	info@sakonnetpreservation.org
Great Land Trust	info@greatlandtrust.org
Desert Foothills Land Trust	info@dflt.org
Minnesota Land Trust	mnland@mnland.org
Land Trust for the Mississippi Coastal Plain	judyltmcp@aol.com
Upstate Forever	droberts@upstateforever.org
Northern Prairies	info@northernprairies.org
Sonoma Land Trust	volunteers@sonomalandtrust.org
Estes Valley Land Trust (EVLT)	evlt@evlandtrust.org
Five Valleys Land Trust	Online form
Nebraska Land Trust	jalishouse@nelandtrust.org
Monadnock Conservancy (MC)	emily@monadnockconservancy.org
The Land Conservancy of New Jersey	info@tlc-nj.org
Taos Land Trust	info@taoslandtrust.org
Hudson Highlands Land Trust	info@hhlt.org
Catawba Lands Conservancy	andy@catawbalands.org
Tecumseh Land Trust	Krista@tecumsehlandtrust.org
The Land Trust for Tennessee (LTT)	volunteer@landtrusttn.org
Texas Land Conservancy	daniel@texaslandconservancy.org

Summit Land Conservancy (SLC)	cheryl@summitlandconservancy.org
Lake Champlain Land Trust	email info@lclt.org
New River Land Trust	mona@newriverlandtrust.org
Teton Regional Land Trust	matt@tetonlandtrust.org
Wood River Land Trust	info@woodriverlandtrust.org
Lake Forest Open Lands	mhahn@lfola.org
Central Indiana Land Trust	scachules@conservingindiana.org
Brunswick-Topsham Land Trust	Online Form
Maine Coast Heritage Trust	jarbuckle@mcht.org
Vinalhaven Land Trust	info@vinalhavenlandtrust.org
Leelanau Conservancy	info@leelanauconservancy.org
Sudbury Valley Trustees	svt@svtweb.org
Virginia Outdoors Foundation (VOF)	afotinos@vofonline.org

Table 3. List and categorization of land trust organizations from across the U.S. with volunteer stewardship programs.

Organization Name	Contact info	Location (city, state)	Urban, Rural, or both (U, R, UR)	Year Founded	Accredited?	Main objectives (max. 2 or 3)	Size of properties (acres)	Main funding source? For whole org. OR just volunteer program (if one, specify)	Type of volunteer program	# volunteers	# staff members, if possible	Time required by volunteers	Training events, if offered	Feedback for volunteers	Other
Maine Lake Volunteer Monitoring Program	207-763-7733 vmp@mainevmp.org	ME	UR	1971	Not applicable	water quality, watershed health and function, and screen lakes for invasive aquatic plants and animals	>500 lakes	annual giving, other forms of donation based		>1000		a) 2-4 hours b) 2-3 hrs/mo.	Workshops, volunteer leader training		
Coastal Mountains Land Trust	info@coastalmounts.org (207) 236-7091, Ian Stewart is stewardship director	ME	UR	1986	Y (2008)	Conserving lands that protect: biological diversity, water resources, productive farms and forests, scenic landscapes, public access to natural areas	9344	multiple funding sources for whole org (see pg. 6 fmp /www.coastalmounts.org/downloads/ops)	a) short term b) ongoing stewardship & c) outreach b)1) land stewards b)2) other (field hand, docents, invasive spp. coordinator, etc.) c)			5	- at least 6 training events, some specialized		
Skagit Land Trust	info@skagitlandtrust.com Michael Kirshenbaum is stewardship director	Skagit, WA	UR	1992	Y (2009)	Protect natural lands, open space, and wildlife habitat of Skagit County.	>6400, more than 28 miles of shoreline	Business supporters, individual donors	community engagement volunteer b)4) researcher	100		7	- volunteer support - pictures from recent volunteer events		Each parcel is assigned one or more Property Stewards. Where more than one Steward is assigned, there may be a team of stewards with a Team Leader.
Northern Connecticut Land Trust	Jerry Stage at dweeze-c3@att.net or Wes Smith at tyroee@cox.net, jerrystage@aol.com	CT	UR	1987	N	Protects acres of natural resources, sponsors outdoor activities on its properties and supports efforts to improve local habitats and maintain farmland and provide recreational opportunities	over 1,300	Memberships, farmland rentals, grants from CT dept of Energy and Environmental protection	Property steward Office help, preserve bird surveys, photographers, stewards, naturalists, weed warriors	12		5	Lunches, seasonal appreciation events	Annual Report with financial costs, different stewardship for the amount you give, walk and hike program	
Descutes Land Trust	descuteslandtrust.com	Sisters, OR	R	1996	Y	conserve land for wildlife, scenic views and local communities	8200	Conservation buyer program, linking potential buyers interested in conservation to sellers		Not listed		10	Training specific for volunteer work done	Annual Banquet, volunteer of the year	
Natural Lands Trust	info@natlands.org	Eastern Pennsylvania, Southern NJ	UR	1993	Y	Preserving open space throughout Eastern Pennsylvania and Southern New Jersey	21000	Force of Nature volunteer program membership fees	Not monitoring, includes invasives, trail maintenance, ect. Presented as an educational experience, multiple training sessions and \$135 entrance fee.	7 main staff members, 50 other more specialized staff		For Force of Nature: 4 hours every month for a minimum of 6 months annually	None, but biannual appreciation event	List of Preserves, find one near you	
Old Lyme Land Trust	volunteer@oldlyme.org	Old Lyme, CT	R	1966 (started earlier as local river protection group)	N	Protect land and water resources of Old Lyme, allow ecological research on properties	800+	Grants, individual donors	Property maintenance; events management; serve on Board; provide skills for programs; content for website and newsletters - Volunteer Stewards Program	Not listed	No paid staff, 4 main officers	No paid staff leads to many individuals, but hours dedicated depends on position	Annual appreciation night	Board committees: Acquisitions, Stewardship, Outreach, Finance and Membership. Volunteers may serve on Board committees without being trustees.	

Little Traverse Conservancy	landtrust.org; Cadia Leah, Volunteer Coordinator and Outreach, 231.344.1002	Harbor Springs, MI	R	<1984	Y	protect the natural diversity and beauty of northern Michigan by preserving significant land and scenic areas, and fostering appreciation and understanding of the environment	16340 monitored, 50,000 total	Donation, memorial donation, grants	Volunteer Preserve Monitor Program: signs, trails/trail steward program, other opportunities (sounds very similar to ALT)	200	monitor twice a year (spring and fall)	partnerships with planning commission and other organizations [this may be one way to draw in a volunteer base?]
Ozaukee Washington Land Trust	Mike Hoffer, Stewardship Director mhoffer@owlt.org (262) 338-1794	Ozaukee and Washington Counties in WI	UR	1992	Y	Protect water resources, natural areas, and working lands, creating public awareness of benefits of land preservation and nature-based recreation	4800 +	Legacy commitment, donation, membership fee	Stewardship and restoration, land protection, organizational support, wildlife monitoring	"an army"	7 A few hours +	Once interest is expressed through online form, training coordinator will contact Annual Dinner

Figures



Figure 1. Word clouds of different colors, generated by wordle.com, using volunteer responses to the question on Survey 1: “Why are you volunteering?”



Figure 2. Word cloud generated by wordle.com using volunteer responses to the Survey 2 question: “What did you find most rewarding about the stewardship program?”

Summary of coded survey 1 data

1. Have you done any previous monitoring (Y=1, N=0)	2. Which part of the monitoring do you perceive as being the most exciting?	2. Difficult?	3. Do you have any recommendations on how the land trust can improve this program	4. Do you feel the work you are doing is important? (Y=1, N=0, Other = wds)	5. Is the work and property convenient for you? (Y=1, N=0, Other = wds)	6. Why are you volunteering?	7. How effective was this training?	8. Any questions or suggestions?	
1	Observing wildlife, healthy forests and wetlands	Staying found in tough territory	Keep introducing training on an annual basis	1	1	ongoing interest		2	
0	I look forward to getting to know and become responsible for/connected to a piece of property that has been set aside for conservation.	Nothing at this point	Not yet	1	1	Not assigned yet. I do not perceive this as being a problem.	Emotionally connected to Maine wild lands	1	Not at this point in time
1	Getting outside, meeting land owners, seeing beautiful areas	Bugs, poisoning, and bears	T-shirts or some kind of recognition: hat, info brochure with basic info, terminology, vest, expectations, ect.	1	1	It is likely to be, but being able to visit somewhere away is okay too.	excuse to get outside, commitment to community	6	Whiteboard-interactive-keywords/definitions images/powerpoint of different properties/issues
0	Exploring the land	Bears	News feature on TV Bill Green's Maine, etc on the role of land stewardship on a local property	1	1	Don't know yet	Something different to do and ALT could use the help	2	
0	Being out in Nature	Learning the boundaries	current and additional information on the website	1	1	to give back		3	
1	Bushwacking over beautiful land, spying	the most difficult part is moving the large soaked dumped couch where it should be	short testimonial videos of stewards in action it may draw people's interest, and a facebook web page	Yes, it's part of easement requirements	1	1	Gives me an excuse to have a beautiful walk in the country with an extra purpose	3	Pictures could be helpful in the training, include more visuals
2	Being an independent monitor of environmental conditions water and wildlife				1	Share rides	check conditions of animal life, see if the fish have improved	1	
1	Walking the boundaries on a cold snowy day and seeing what's out there	Making the time to do it	Get more stewards involved	1	1	1	I love ALT and land conservation, getting outside is my favorite part	1	Not yet
Yes, at other land trusts but not for ALT	Walking the land	Coordinating with the land owner and finding a time that works for us all to go out	Digital database and online submission form that runs straight to the database, they are relatively inexpensive and help with data analysis	1	1	1	I like the land, care about land conservation, and am happy to help since I value what ALT does	1	Quite clear but going out and walking is most helpfu
2	Understanding conservation values		I am interested in actual resource monitoring and environmental values as well as current use and management plans	Yes but I feel incorporating environmental education on these lands is important	1	1	Interested in helping	5	How does the land conservation values work in the surrounding properties? Do they work together regarding plans? Broader area plans and broader conservation goals? Explain the important of the value, Are conventional management plans sufficient? Funds could be spent in better ways, spending \$5000 on lawyers drafting easements is moeny that could be spent elsewhere. Make landowners more aware of all the potential values in their land and tell them how it fits in with broader conservation goals

	Being outdoors but useful at the same time 0	Staying consistant for the long haul	More community activities		1	1	Improving the local community	8	No
	Being outdoors in a nice setting, getting to know that piece of land more intimately 1	Working to proect the land from uses inconsistent with shared uses/destruction	Consider distribution of newsletter beyond membership -- it's really good		1	1	Wanted to contribute to preserving space available for outdoor recreation in a moderately urban setting (by Maine standard)	7	Program has opportunity to be knknown better in L/A. Could help draw membership and volunteers (e. g. I was not aware of paddling and hiking events)
	Really getting to know a special piece of property. Enjoy nature and have a gift of a special moment 1	The land owner contact and the abutter about using her land for a garden	Expand it with younger groups, boy scouts, Park Districts	Absolutely! The easements are forever		1	Love Maine and ALT mission		New faces
	Themes: getting out in nature, caring for the environment, walking outside, conserving beautiful landscapes	I think most of these concerns were addressed in training EXCEPT for the difficulty of the time commitment, and fear of contacting the landowner/coordina the meetup/time comittment issues	This seems like an area where our suggestions should be informed by knowledge of the ALT's funding for the monitoring program becuae many of the suggestions like publications, news letters, website improvement and data management --> general outreach	All sense the work is important--> not a chore for them	Properities are convenient general, identify people who need rides at training sessions, leave time in the meetings to discuss carpooling		Loyalty to ALT mission, excuse to get outside and do something productive, conect to land by giving back to the community	3.33333333333333	More engaging training with visuals, outreach, broader goals explained, recognition

Summary of coded survey 2 data

Q 1 challenges	Q 1 rewarding	Q 2	Q 3 (many responded for over the course of the year versus just this monitoring period, and some have more than one property so each one is a separate data point)	Q 4	Q 5	Q 6 volunteer again	Q 6 recommend to friend	Q 7	Q 8
Finding time (to go out, to complete report) = 7 responses	helping keep a place clean, maintain part of trail = 2 responses	Yes = 10 responses	4 hours = 4 responses	Range from 2-250 acres. Do we want to analyze relationship between hours spent and number of acres? Is this important?	being actively engaged in the community, leadership roles = 3 responses	Yes = 14 responses	Yes = 13 responses	more communication between stewards and main office = 2 responses	Skipped = 4 responses
Walking along steep terrain	observing great resources close to home	Didn't know there was a sheet = 3 responses	2 hours = 2 responses		liking/being experienced with physical activity = 2 responses		Unanswered = 1 response	No suggestions = 6 responses	No, thanks = 6 responses
trail maintenance/consis = 2 responses	Tambrands and Walmart sent people out to help maintain and upgrade what was there and then to see the local people be so surprised that there was a trail there at all.	Skipped = 1 response	1-4 hours per week		off-site meeting = 2 responses			Skipped = 1 response	To know what the goals (short-long term) are of the ALT and what they expect from each section that are under their control. This would be a big help to start.
finding boundary markers = 2 responses	conserving publicly accessible land being part of an organization that works to make sure these properties are set aside.		5 hours		being on-site with ALT staff = 3 responses			meetings on different day	Only a big thanks to Walmart and Tambrands and the National Guard and all the stewards and volunteers for all their help. Also Lowe's and Home Depot for their support.
	seeing the city of Auburn address problems at my site after I gave an assessment.		3 hours		Working with Mike, available for questions and training = 5 responses			letting Stewards know of additional properties that need assistance	Mike Auger does a fabulous job as ALT's land and stewardship director.
			8 hours		appreciation for nature			more communication/coll between stewards	
	meeting new people with similar interests		1 hour		reading through easement property report and maps			visuals in the training	
	being out there once you finally get there		2.75 hours		grew up on land			Continued consistency and organization.	
	get off the beaten path, feel the land connected to the community		3 hours					more volunteers so that more than one person on each property	
			1-2 hours per month						
	getting outside		9.5 hours						
	contributing		10 hours						
	creating well marked, defined, property lines								
	getting to walk the land while observing for report								

Summary of coded interview data

	Ozaukee Land Trust	Lowell Land Trust	Altogether Land Trust	Greater Worcester Land Trust	Upper Valley Land Trust	Indiana	
Number of Volunteers	100 active, 2000 in database		24 individuals, unknown group volunteers (some in corporate groups of 50-10)	Tracking volunteers based on year, hours, events, program online, in the last year, 540 instances of volunteer showing up doing training, different kinds of volunteers breakdown of categories	120 volunteers	Solid number of volunteers, base volunteers and then an unknown number of corporate 1 timers, can measure volunteers by hours of instances of them showing up	
Number of Staff Members	5 full time, part time and seasonal workers too		2	One full time, 2 part time members, 3 full time	9 full time employees	All land trusts were similarly staffed (and presumably funded) with the exception of the UVLT. Very wide range of acreage ALTY had more acreage than most of these but not the most, upper middle	
Acres	1127 fee lands, 3700 conservation easement acres	few	1600 mostly fee lands	2,000 acres of land some smaller parcels	44,000 acres		
Description of monitoring programs, what they do, who volunteers are, how it works, etc.	sponsored workdays and individual stewardships, monitoring, rotations, standard checklist and open space to take photos observations, meet with landowners, asked to take photos	City limits of Lowell "toy land trust" but large volunteer base, 7 properties, doing this for years-incorporated on daily walks, urban area so there are a lot of changes weekly-critical volunteers	2 types of properties: (1) Green spaces, smaller, no trails, more difficult and (2) Premier properties- make the space a gem an example to show what can be done with a lot of volunteer time, lot of volunteers to make a real pact on the property	Scheduled work days- alternate months, trail maintenance one day, signage one day making informational info, time slots where people can jump in, regularly- always out there	-Use volunteers across the organization, most hours for stewardship, help conservation assessment monitoring, walk each land once a year-50% of assessments, 452 assessments, spring-summer-fall monitoring, staff monitors year round, volunteers on fee properties and use fee lands for education experiences, impact of invasives on local forest, 27 years used volunteers for about 13.5 years, number of volunteer hours has doubled-some invested in attracting volunteers, seeking and training volunteers, tailor to volunteers' personal interests, only want volunteers to do half of monitoring because they don't want to lose connection with the land owners	45 programs have both individual monitors and a number of volunteers who come from established groups trying to reach out to the community, corporate/trails, Established groups are successful and unannounced newspaper advertisements are unsuccessful. Retail mobile: best customer you have is the one you've got- focusing inward. Focus on communication, updates emails, validating the volunteers by really listening to what they have to say and following their suggestions if at possible. Particularly valuable because of high training costs and timing. Some activity result at farm-to-market events and do publish things in the paper. This is so people are familiar with the work the organization is doing and to get community support.	
Tasks of the Steward	Invasive plants, walk boundaries, rotations	Large group focus clean-up days	Invasive removal, trash removal, urban ecosystems	Invasive removal, trash removal, urban ecosystems	Monitor fee lands once a year for their own benefit- have public trails, invasives and running events	Tasks vary greatly between urban and rural lands, 3.5 land trusts do more work with invasives, included as part of the training but work with invasive knowledge is assisted/judged	
How to become a volunteer	New volunteers fill out online interest form		Online interest form, word of mouth, a lot of volunteers come from their partner organizations	Basic Training for monitoring tasks which includes invasive ID, field erosion, tree/shrub planting	Online interest forms and description of the program		
Training?	8 hour training session, 4 year commitment, no group training for easements-> no way to enforce the 4yr commitment	Basic training how to, want people to feel comfortable knowing how to navigate through the woods, reading a map, skill set	15 different trainings, unique trainings organized with partner organizations, has included Bird ID, Starazing ID, wildflower ID, etc	Can be trained to become a "crew leader", so a half day training, the crew leaders lead smaller groups of volunteers at large monitoring events	Once a year, pizza/offro training, some new people and old people, social aspect and a good review, one person on staff goes out with the monitors, trail and sign work-trained as they show up, 10-15 minutes to explain the tasks they are working on, Volunteers training other volunteers, 2 part training social in the office and then a follow up field training, done with a small group	Monitor training once a year in the spring to get the most usage out of the volunteers, 1/2 day training 5-6 hours inside go over UVLT's mission, what an assessment is, purposes, etc, expected to read assessments first, how to read a map and compass, 2nd half is on site training, break up in to groups and have a mock monitoring visit, fill out the report, 60% become volunteers, send reports pictures and good- one time thing, volunteers don't have to attend annual training unless their reports aren't good-provide a lot of feedback, easy to attract top-notch volunteers	Once a year, inside training basics (included how to read a map and compass) and then an on-site or mock monitoring session in smaller groups. More specific/further trainings are available eg, crew leader, more invasive knowledge
Data collection-online, returning forms, etc.	standard checklist and open space to take observations, microcut access for master database, asked to bring a camera to take photos	Online form-access, boundaries, invasives they submit the form electronically, sent to director then the log all information and manage data	TOTAL COMMUNITY MANAGER- all aspects of the land trusts- database of all members how much they've donated/volunteered based in Maine- workable for larger organizations- "It's an investment" support system, hard to get info out of it- access database sounds enthusiastic, can import documents-identifies members	Official monitoring report (kind of work)-> online form - now they have a card, highlight things what they see, then they email them, forms found to be unsuccessful, more likely to email, card	narative form Training about reports-report what they see don't make judgments		
Data storage and use	Microsoft Access		Struggle with online info and forms- for years they had forms and hand written files several monitoring reports, struggle with getting it online, short and simple report (one page front and back). The website where they log hours in through one of their servers.	Validate the volunteers suggestions by doing what they suggest	Data management- report gets sent to the landowner, accredited so it's stored in several ways- paper copy, digital copies, fire-proof copies, entered into a contacts database, Microsoft access	However, no one seemed particularly fond of their online data management systems. Microsoft Access was commonly use with few printers and community manager	
Suggestions, methods for attracting volunteers	retail store strategy, important customer metaphor, not much volunteer outreach but stay in touch with current, HS students limited work, recap/pictures/upcoming events weekly email, most important customer is the one you already have.	reaching out to people word of mouth- newspaper reach the masses, get the community familiar with the work the trust is doing- environmental education program (really about connecting to their parents to get the parents on board)	Reaching out to bigger established groups to get things accomplished. Make personal relationship with business/owners adjacent to your property, get to know your neighbors for good paths- know the history are willing to help and donate time/money to make their space a little bit better. She sends a letter to all the easement owners about the daytime the monitors will be out there	Monitoring- finding the right individuals, finding teams do on their own, make it fun by finding groups, accumulated over time, social thing	fewer volunteers have been younger professionals that work in areas related to conservation or town/city planners (new change) electronic communication on FB, less printed materials, rigorous event calendar with lots of events. Send out catchy emails to their list serv	actual work they do and 120 more people who can act as an ambassador- community engagement is very important word or mouth	
Unsuccessful methods attracting volunteers	chasing down high school groups limited work, annual dinner, every season appreciation event (e.g. 200 in the spring, call volunteers to show appreciation, social nature motivating- appreciating what they do, must ask volunteers-call them and thank them. Every season appreciation for volunteers- for example, bottle picnic food at one of the preserves online calendar, etc. no day, blog at the office in the spring	Volunteer appreciation night-own a historic house and they have folks come over for snacks and drinks to appreciate all the work they've put forth- springtime or once a year-small gathering, nothing too big- just letting them know they are appreciated	Send a lot of emails, keep volunteers informed and encourage them to bring a picnic-> word of mouth	Plug in younger volunteers at one time events	events they run, put training in in the local paper, facebook, ask volunteers if they want to renew a friends, group, 6-12 new people a year, happens over time, contacting established corporate groups to get lots of hours, employee assistance increases		
Volunteer recognition			Large publications, mass emails, events with the general public are "not productive"	Recognition- thank them profusely, they are treated as members! Even if they haven't paid the membership fee. Give out t-shirts, hats, vests are popular - Annual meeting and call names of volunteers, just as important as donors, speak to their strengths publicly. Modest offerings	annual volunteer celebration/open house, decorate the office, get tasty products, make chili, he tries to thank them very personally about their accomplishments, stats, no individual awards, collective thanks. Appreciate what they do- like them having another part time employee, very appreciative	All stewardship directors agreed that they recognize volunteers in a small, or very casual way. Directors tend to thank members personally, calling out their names at an event, speaking with them about their contribution. Small gatherings to further emphasize the theme of monitoring as a "social place" with like minded people. Had some kind of food and most organizations provide some sort of small gift, something with a logo, t-shirt or other	
Funding information	40% young healthy retirees, more men than women so try and tailor activities to engage both genders, entail hikes as volunteers, send out weekly emails with pictures, recap of the previous week	Funding- membership based, grants to support education program and restoration- 2 main sources grants and membership, digitally responding to emails meeting individuals	Funding- urban eco steward program gets small grants (5,000-10,000) to pay for her time and the 14 hrs they get. Their land trust doesn't have membership program but they do have email donors	Funding monitoring program- mix of member donations, applied to foundations for some funding-> usually variable, some interest off land 3 main pools. Money for tools, food, coordinator's wage grants are used for, see if the grant fits their model			
Other interesting info			Emphasizing social aspect of monitoring- high retention for group monitoring days, find different tasks that fit their personalities (retention)		find a property that a volunteer would enjoy, he calls the landowner (don't want to lose direct contact) then he sends a blank report		

Appendix D: Materials

1. Land Trust Alliance (LTA)

Land Trust Standards and Practices 2004

Appendix 7B: Volunteers

This example can be used as a starting point to create a policy or other document for your own land trust, but should be altered as necessary to reflect your organization's unique circumstances using guidance found in the *Land Trust Standards and Practices Guidebook* text and corresponding Standards and Practices Curriculum.

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MEMBER SURVEY UPDATE

TO ALL OF OUR NEW MEMBERS, THIS IS HOW WE TRY TO KEEP TRACK OF OUR VOLUNTEER RESOURCES. PLEASE NOTE THAT WE KNOW THAT YOU ARE BUSY AND WONT BE ABLE TO HELP OUT EVERY TIME. TO OUR CONTINUING MEMBERS, PLEASE TAKE THE TIME TO UPDATE OUR FORM. THANKS!

- WORKDAYS** I'm interested in coming to Wolf Road Prairie management workdays.
- FEST** I'd like to help out at the Save the Prairie Society annual Prairie Fest day of tours. (This does not necessarily mean that you must be a tour guide.) Prairie Fest is the Sunday after Labor Day weekend
- PRAIRIE BURNS** I would like to volunteer for the spring and fall management burns at the prairie.
- WEEKDAY PRAIRIE BURNS** I might be available for some weekday management burns at the prairie. *We are in great need of people who can help with weekday burns!*
- PROGRAM MEETINGS** Let me know if you are planning to have a special Society meeting which will include an educational program.
- PRAIRIE PATROL** I'd like to help keep a lookout for people abusing Wolf Road Prairie's rare ecosystem.
- TOUR GUIDE** I would like to lead or help lead tours of Wolf Road Prairie.
- PHONING** I would be willing to help contact volunteers by phone for various activities.
- ADDRESSING** I might be available to help prepare a Society mailing, (folding, stuffing, sorting, labeling, etc.
- EXHIBITS** I would like to help out with Society exhibits at various functions such as flower shows.
- TYPING** I would like to help with the typing of the newsletter. (General familiarity with computer typing is helpful but not necessary.)
- PLANT OR ANIMAL STUDIES** Let me know if you need help with plant or animal monitoring at the prairie.
- LEGAL SERVICES** I am a lawyer and would like to volunteer my legal services to the Save The Prairie.
- HISTORICAL HOUSE** I'm interested in helping to restore the historical house at the north end of the prairie.
- EDUCATION/NATURE CENTER** I would like to help the Prairie Society develop education programs for schools and other local groups. The ultimate goal of this plan is to establish a nature

Revised 11/2008

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FIELD WORK

PROJECT: Assist with field work on Society properties.

PROJECT MANAGER: Geoffrey Jones, SPNHF Forest Manager

TIME COMMITMENT: A few hours, an afternoon, a day, a weekday or weekend, depending upon your availability.

LOCATION: Current emphasis is in Bethlehem, in the Hillsborough-Dublin area and in Grafton. However, the Society owns property all over the state which will eventually require volunteer assistance.

SPECIFICS: This volunteer position includes boundary work, trail work, research of abutting landowners to Society properties and timber sale clean-up work. Instruction will be provided but this is basically unsupervised work done on one's own or in pairs or teams (depending upon volunteer preference).

SKILLS: It is important that volunteers are in good physical health. Knowledge of boundary work would be helpful and the ability to read maps is necessary.

NOTE: Mileage reimbursement is available along with modest stipend of money and/or cordwood.

NATURE TRAIL GUIDE

GOAL: Within the purview of coordinator of volunteers and under the direction of a project manager, lead interpretive tours on the Society's Merrimack Valley floodplain nature trail.

TRAINING: Training will be provided.

LEARNING

REQUIREMENTS: Develop a general knowledge of the Society and its goals and objectives; and become familiar with the Society's nature trail by developing knowledge of its natural aspects.

DESIRABLE SKILLS: The ability to deal with groups of various ages; possession of good communication skills and the ability to interpret nature and the environment.

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VOLUNTEER JOB DESCRIPTIONS IDENTIFICATION OF PROPERTY OWNERS

PROJECT: Identification of property owners adjacent to SPNHF-owned land.

PURPOSE: To further land protection efforts in these areas.

TIME COMMITMENT: A one-time project per property; range from 2-3 hours.

LOCATION: In your town and/or area.

PROCEDURE:

1. Determine location of SPNHF-owned parcel (get map from SPNHF office);
2. Go to town hall to tax records section;
3. Look up SPNHF-owned parcel on tax map;
4. Write down parcel numbers of all properties adjacent to Forest Society property;
5. Look up owners of these parcels (ask clerk to show you how; it varies by town);
6. Write down names and addresses corresponding to parcel numbers;
7. Write down acreage (size) of each parcel (may be on map; may be in master book or on property ID cards, depending on town -ask clerk);
8. Get copy of tax map showing relationship of parcels to SPNHF property (submit expense request to SPNHF office, c/o Trish Churchill).

This material is designed to provide accurate, authoritative information in regard to the subject matter covered. It is provided with the understanding that the Land Trust Alliance is not engaged in rendering legal, accounting, or other professional counsel. If legal advice or other expert assistance is required, the services of competent professionals should be sought.

Practice 7B: Volunteers

- If the land trust uses volunteers, it has a program to attract, screen, train, supervise and recognize its volunteers.

Volunteers provide tremendous benefits to a land trust and may be one of the organization's strongest assets. In many organizations, they perform the work that would otherwise be done by paid staff. In other organizations, they reduce the workload on staff and dramatically expand a land trust's capacity. If not used effectively, however, volunteers can be a drain on the organization or they may feel unrewarded for their efforts. Poorly trained or unsupervised volunteers can even pose liability problems. A land trust that wishes to engage volunteers effectively to accomplish important work should establish a program for recruiting, screening, training, supervising, and recognizing them.

Many land trusts make effective use of volunteers. The tips and recommendations in this section are adapted from a paper by Will Murray of Conservation Impact and the former Director of Conservation Programs for The Nature Conservancy's Western Regional Office.

Setting Up the Program

A land trust may be able to use an occasional volunteer for very simple tasks and do so successfully without much planning or supervision. But a land trust that depends on volunteers to accomplish important work should establish a program for recruiting, screening, training, supervising, and recognizing them. The extent and formality of the program depends on the number and types of volunteers involved. Operating a structured volunteer program can require a significant investment of time and energy, but it greatly increases the land trust's success in using volunteers—and heads off potential problems.

Before establishing a volunteer program, a land trust should seriously consider whether volunteers are really needed and whether someone can devote the time to train and supervise them. A staff person with the Society for the Protection of New Hampshire Forests, which makes extensive use of volunteers, says:

You have to know what it is you want your volunteers to do and how you will train them before you recruit them. Otherwise, you will look unprepared and disorganized, and your volunteers will lose interest.

Why people volunteer

To develop an effective volunteer program, a land trust needs to understand what motivates people to volunteer. Among the main reasons people give for volunteering are:

- **It is easy.** A land trust needs to make it easy for people to volunteer by having convenient times and locations for volunteering and not expecting unreasonable amounts of time to be given.
- **It is fun.** People like the social interaction and camaraderie of volunteering. Pizza and beer can liven up an evening spent stuffing envelopes for the membership mailing. Picnics or outings for volunteers, especially with other land trust personnel, can build the feeling of teamwork.
- **The opportunity to learn new things.** Volunteers may seek an opportunity to learn new skills or to learn more about the land trust and its work. Providing ongoing training or education or interaction with land trust insiders may be especially important for some volunteers.
- **To be involved with a cause.** Volunteers need to understand and feel involved in the organization's work and mission. They should be kept informed about the organization's activities, and the relevance of their work to its success should be clear.

Identifying volunteer jobs

It is demoralizing for a volunteer to find that the organization has no clear idea of how he can be utilized or that there is not enough work to keep him busy. The land trust should make a careful assessment of program needs and develop a list of jobs that can be done by volunteers. The assessment should identify the tasks to be done, the skills necessary to do them, the amount of time they require, the number of volunteers needed, and who will directly supervise the work.

Volunteers tend to work best for jobs that have one or more of the following characteristics: they can be broken down into manageable segments with clearly defined conclusions; they require a large number of people to accomplish; they are repetitive and easy to learn; or they require skills that the land trust does not have.

Land trusts use volunteers for many types of jobs, from routine administrative details to highly professional work. They include the following:

- **Land-related research.** For example, the Steep Rock Association in Connecticut has used volunteers to update lists and maps of properties abutting their preserves. The Marin Agricultural Land Trust in California has used volunteers to work on its agricultural land trust database.
- **Office work.** The Island Heritage Trust in Maine depends on volunteers to help run its office, including getting out mailings and distributing promotional items.
- **Education.** In the past, the Society for the Protection of New Hampshire Forests (Forest Society) has trained "docents" who brought natural resource education to

youth and adult groups across the state. The Wissahickon Valley Watershed Association in Pennsylvania trains volunteers to teach its educational programs.

- **Nature center operations.** The Forest Society trains volunteers to deliver educational tours of its solar-heated conservation center. The Wildlands Conservancy in Pennsylvania uses volunteers to operate its educational center, do gardening and lawn work, keep bird feeders filled, and organize and operate the library.
- **Special events.** Land trusts make extensive use of volunteers for special events. Volunteers help plan and conduct annual dinners and picnics for many land trusts. The Yakima Greenway Foundation in Washington has made extensive use of volunteers in its “Gap-to-Gap” relay, which has become a weekend of events celebrating the protected river. The Sanibel-Captiva Conservation Foundation in Florida used volunteers to run its “Great Island Pickup,” a litter pick-up effort. Volunteers serve as cooks, front desk help, loaders, and weighers.
- **Maintenance and construction.** Many land trusts use volunteers to work on trail construction and maintenance crews. Volunteers, appropriately supervised, may also work on construction of various types of facilities.
- **Land management.** The New Jersey Natural Lands Trust has used volunteers to manage trust-owned properties. In Illinois, a volunteer stewardship network has helped accomplish boundary posting and patrolling, prescribed burning, restoration, and other activities for The Nature Conservancy’s 140 preserves.
- **Inventories.** The Island Heritage Trust had volunteers assist with its scenic, historic and cultural inventory.
- **Newsletters/publications.** The Wissahickon Valley Watershed Association had a volunteer (a former teacher and librarian) who wrote its press releases. Many land trusts have volunteer newsletter editors. Sanibel-Captiva Conservation Foundation had a volunteer update the field guide to one of its preserves; the same volunteer also wrote a nature column for the foundation’s newsletter.
- **Office work.** The Lakes Region Conservation Trust in New Hampshire uses volunteers to manage its office archives and to assist with special mailings.
- **Tour guides.** Many land trusts use volunteers to lead hikes on their properties. Sanibel-Captiva has used a formal trail-guide volunteer program for its system of preserves. The people who coordinate the volunteers are volunteers themselves. The Conservancy, Inc., in Florida has volunteer boat guides for some of its trips.
- **Photography/design.** Land trusts often use volunteer artists or designers to design land trust materials, especially for special events, and photographers to take photos for the newsletter and other purposes.

Recruiting Volunteers

To effectively recruit volunteers, a land trust needs to develop a description of the available jobs, advertise those jobs, and screen potential volunteers to assess their interests and skills and match them with appropriate work.

Job descriptions/written expectations

Job descriptions help a land trust analyze the job requirements, enable the land trust to match volunteer interests and talents to the positions available, and are essential in evaluating volunteer performance.

Volunteer job descriptions can be brief and simple but should include a job title, the name of the person supervising the volunteer, specific job responsibilities and schedule for completion, job logistics (hours, location, etc.), and any qualifications required. It may also be useful to list job “benefits”, such as the opportunity to develop new skills, to work closely with staff or other professionals, to do hands-on conservation work, to have fun, or to be actively involved with an important cause.

Attracting volunteers

Land trusts can use various methods to recruit volunteers.

- **Develop volunteer recruitment materials.** Materials should describe the goals and programs of the land trust, the types of jobs volunteers can do, and the benefits of volunteering. The Forest Society has a general brochure on volunteering, and a specific brochure on its docent program for delivering environmental education.
- **Get the message out.** Most land trusts announce volunteer jobs in their newsletters. The Sanibel-Captiva Conservation Foundation regularly prints profiles of volunteers, which not only recognize the volunteer, but give potential volunteers a picture of how their skills might be used and what kind of help the organization needs. Some organizations include a form or a check-off box in their membership flyer. If a land trust needs many volunteers, it might run advertisements in local newspapers and use radio public service announcements.
- **Target key organizations.** Volunteers may be found through other organizations, including other conservation organizations, volunteer action committees, service clubs, outdoor groups, scout or other youth clubs, colleges, organizations for retired people, and organizations for the handicapped.
- **Use recruiters.** Some organizations develop a corps of recruiters—preferably volunteers themselves—to make presentations on the organization and its volunteer needs. The Wildlands Conservancy in Pennsylvania holds an evening orientation session with coffee and donuts and asks volunteers to bring a friend interested in volunteering.

Screening volunteers

Screening volunteers allows a land trust to match volunteers with jobs that fit their skills, abilities and interests. To screen volunteers, land trusts should:

- **Have volunteers complete an application.** The application should be simple and include questions on applicable experience, type of volunteer work desired and the conditions under which the volunteer can work (such as the time of day and number of hours).
- **Conduct an interview.** An interview, conducted by phone or in person, allows the land trust to make a better assessment of the volunteer's interests and abilities and allows the volunteer to learn more about the organization and work involved. If possible, the person who will supervise the volunteer should be present. An interview leads to better volunteer performance and a lower number of dropouts—ultimately saving time and preventing unhappy situations. The formality of this interview can vary with the type of volunteer position.

Screening volunteers may help a land trust identify unexpected skills and talents. One Florida land trust found a former Dow Chemical employee, experienced in chemical vegetation control, who helped eradicate nonnative Brazilian pepper trees from the trust's properties. The same organization also found a retired architect, who oversaw the building of its observation tower and teaching shelter.

Managing and Recognizing Volunteers

For volunteers to be effective, they need to be trained to do the work expected of them, supervised to be sure they are carrying it out correctly and that they have the tools and resources they need to do the job, and, above all, recognized for the important contribution they make to the land trust's accomplishment of its mission.

Orientation and training

Volunteers need to be properly trained so they can perform effectively and be good representatives of the land trust. For many jobs, training and supervision is minimal but necessary. Training is critical if the volunteer's work involves safety hazards; a land trust may open itself to liability if it does not appropriately train volunteers who must handle dangerous equipment or undertake hazardous jobs, or who lead others in such activities.

Training begins with an orientation session. The orientation should provide an overview of the organization's goals, programs, policies, and procedures; an introduction to other volunteers and/or staff; and a discussion of how volunteer efforts contribute to the success of the organization.

For most land trust volunteer work, training is on the job. Where necessary, the land trust should hold individual training sessions. The volunteer should be walked through the project and given an opportunity to ask questions. Supervision should be close in the

beginning to make sure the work is done correctly; it is discouraging for a volunteer to complete a task and then find out it was done wrong. The supervisor should be sure the volunteer has the tools necessary to do the work, such as sufficient desk space or access to a telephone or computer.

In some cases more extensive training may be required. Here are two examples of land trust programs that have been established. These programs may have evolved since this writing.

- Sanibel-Captiva Conservation Foundation trains volunteers to serve as trail guides on its properties. After an introductory training course, each new guide is teamed for one month with an experienced trail guide to gain practical experience. Experienced guides may also attend the training courses as refreshers.
- The Forest Society in New Hampshire provides intensive training for its environmental education docents, who attend courses twice a week over a two-month period.

Volunteer training should be an ongoing activity. Where appropriate, volunteers should be invited to attend workshops and conferences and should be included in staff training sessions. Volunteers should be kept informed of changes in organizational policies and procedures and of new programs. This helps them feel part of the organization, allows them to represent the land trust more effectively and informs them of new volunteer opportunities.

Supervising the work

Supervision provides an opportunity to assess the volunteer's work, to address any problems that may arise, and to determine whether there is a good match between the volunteer and job. Supervisors may be board members, staff or other volunteers. Ideally, one person should be given the responsibility of coordinating the volunteer program. In some cases, the job of administering it on a day-to-day basis is given to a volunteer.

Without supervision, volunteers also pose a risk to the organization in their demeanor or behavior. One land trust received a complaint that a volunteer had sexually harassed a participant in the land trust's special event. The land trust was able to deal with the problem quickly and decisively because someone was clearly in charge and responsible for making decisions. The volunteer was immediately interviewed and dismissed from the volunteer position.

The supervisor should meet regularly with the volunteer to assess the progress made (as measured against goals outlined in the job description) and to identify areas requiring attention. Records should be kept of volunteer activities and accomplishments for use in future job placement. Volunteers should be told when they are not meeting the requirements of the job and either be given additional training, offered another position or (as tactfully as possible) relieved of their responsibilities. Volunteers who leave the organization should have exit interviews to help identify areas where the volunteer

program needs strengthening.

The approach to supervision varies with the type of work involved. The work of some volunteers is closer to pro bono consulting work than what is traditionally considered volunteer work. Obviously attorneys, land planners or naturalists donating their time to accomplish work in their field should not be supervised the same way as volunteers cooking at a special event or leading trail hikes. Nevertheless, their work needs to be supervised and evaluated.

Recognition—the most essential step

Volunteers should be recognized frequently and in a variety of ways. Thanks may be informal, such as writing an informal note of thanks or taking the volunteer to lunch. But it should also be formal. Examples of recognition include certificates, award dinners or picnics. The Forest Society gives “Volunteer of the Year” awards at its annual meeting. The Wildlands Conservancy holds an end-of-year thank-you party as an open house at its educational center. One Florida land trust held a sunset cruise to honor its volunteers. The Island Heritage Trust in Maine thanked volunteers at a ceremony in which they received copies of a beautiful poster of the area. Many land trusts feature volunteers’ accomplishments in their newsletter and sometimes in the local paper. Volunteers may be invited to special social and educational events. Some volunteers may be interested in pursuing a volunteer career ladder that offers increased responsibility, the chance to do more interesting work and promotion to leadership positions, such as volunteer coordinator or director.

Perhaps most important of all, volunteers should be thanked at the end of the day for their help—a simple but very effective form of recognition.

Evaluating the Program

Land trusts should periodically evaluate the work being completed by volunteers, and the comments of volunteers and staff, and assess the success of the volunteer program. Is the use of volunteers improving the land trust’s program? If not, what is the problem? How can the program be improved? The land trust might look at how other organizations use their volunteers and adapt ideas where appropriate.

Sample Materials from Land Trusts

- [Lakes Region Conservation Trust \(NH\) – Volunteer Opportunities](#)
- [Save the Prairie Society \(IL\) – Member Survey Update](#)
- [Society for the Protection of New Hampshire Forests
Nature Trail Guide
Volunteer Job Descriptions: Identification of Property Owners & Field Work](#)
- [Yakima Greenway Foundation \(WA\)](#)

[Greenway Volunteers Are Special \(recruitment materials\)!](#)
[Volunteer Application](#)

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*GREENWAY VOLUNTEERS
ARE SPECIAL!*

**Yakima
Greenway
Foundation**

Volunteer Opportunities

The Yakima Greenway Foundation relies on the help of volunteers throughout the year to ensure the success of our activities. New volunteers are always needed and welcome. Please join us!

Volunteer Recognition

Greenway volunteers are recognized for their dedication throughout the year. "Volunteers of the Quarter" are named in March, June, September and December. One of them is chosen "Volunteer of the Year" in January and recognized at our annual meeting. We also honor individuals, businesses and groups for their voluntary contributions at the annual meeting. These special people are our **Evergreen Volunteers**. Finally, we throw a volunteer thank you party each fall as our busy season comes to a close.

Volunteer Jobs

Volunteers are needed in three basic areas:
At the Greenway, in the office and for special events.

At The Greenway

Gardening, tree planting, weed control along pathway, sweeping the path, litter pickup and restoring picnic tables and benches, painting.

In the Office

Labeling, bulk mailings, stuffing envelopes, computer data entry and filing.

Special Events

Gap-to-Gap Relay Race (first Sunday in June):

About 300 people needed for race course monitors (for safety and information), merchandise sales, helping racers at the exchanges, set up and take down tents, place signs.

Jr. Gap-to-Gap Relay Race (day before Gap-to-Gap): About 100 persons needed for race

course monitors and course set up. The safety and success of these races is dependent on adequate volunteer coverage.

Duck Race (fall): Ticket sales, merchandise and concession sales and computer data entry.

(Ticket sales people must be Yakima Greenway Foundation members per Washington state law.)

Information Booth (spring through fall): Volunteers needed to staff booth at Sarg Hubbard Park on weekends to answer questions and provide Greenway membership information.

If any of these volunteer jobs match your interests, time and skills, contact the Greenway volunteer coordinator
453-8280. ;

The Yakima Greenway Foundation is a private, non-profit organization responsible for development, maintenance and operation of the Yakima Greenway. Donations of time and money are crucial to the success of our work to preserve and protect this beautiful area.

Yakima Greenway Foundation
103 South Third Street
Yakima, WA 98901
453-8280

*This material is designed to provide accurate, authoritative information in regard to the subject matter covered. It is provided with the understanding that the Land Trust Alliance is not engaged in rendering legal, accounting, or other professional counsel. If legal advice or other expert assistance is required, the services of competent professionals should be sought.

This example can be used as a starting point to create a policy or other document for your own land trust, but should be altered as necessary to reflect your organization's unique circumstances using guidance found in the *Land Trust Standards and Practices Guidebook* text and corresponding Standards and Practices Curriculum.

Please Note: If you are using this material for accreditation purposes, see also the [Land Trust Accreditation Commission website](#) for additional information. To search for policies from accredited land trusts, insert <<accredited>> along with the search term (e.g., conflict interest policy accredited).



**Yakima Greenway Foundation
Volunteer Application**

Name _____
Address _____
Home Phone _____
Work Phone _____
Employer _____

Can you take calls at work? Yes No
Skills, interests: _____

Hours/days available: _____
Previous volunteer experience: _____

Volunteer positions sought: (Circle all that interest you)

Office	On the Greenway	Special Events
Computer input	Weeding	Merchandise sales
Filing	Litter pickup	Membership/info.
Labeling/mailings	Planting flowers	Planning/organizing
Misc.	Painting	Set up/take down
	General maintenance	Duck Race ticket sales
	Membership booth	Gap-to-Gap course monitor

Please list health concerns which we should be aware of: _____

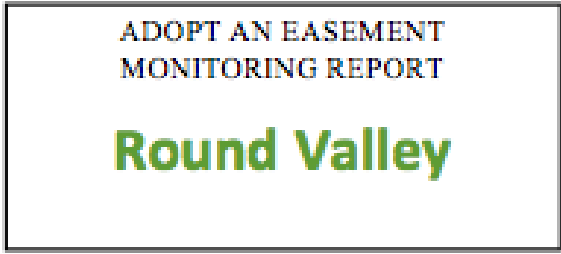
T-shirt size Greenway member? Yes No

Emergency contact name/phone): _____
Signature _____

Thank you for volunteering for the
Yakima Greenways

⁹ This material is designed to provide accurate, authoritative information in regard to the subject matter covered. It is provided with the understanding that the Land Trust Alliance is not engaged in rendering legal, accounting, or other professional counsel. If legal advice or other expert assistance is required, the services of competent professionals should be sought.

2. Summit Land Conservancy (SLC)



Monitor's Name:

Email:

Phone:

Date Visited:

Total Time Spent on Property:

Method of Inspection and Trails used:

Conservation Values: Property possesses natural, scenic, recreational and visual open space values of great importance to the people of Park City and the people of the State of Utah, which are worthy of protection. It is the purpose of this Easement to assure that the property will be maintained forever in open and recreational space, protecting in perpetuity its scenic, open and undisturbed character and recreational value and preventing any use of the property that may significantly impair or interfere with the conservation values of the property.

Damaging Property's Conservation Values

Damaged Trails:

Construction Materials/Vehicles:

Evidence of Off-Road Vehicle Use:

Evidence of Hunting/Trapping:



Adopt an Easement

Name:

Email:

Phone:

Address:

How did you hear about the program?

Monthly time commitment:

Thank you for volunteering to help monitor Open Space in Summit County!



Fact Sheet

March 2013

Office

1650 Park Avenue, suite 202: in the JP Morgan/Chase Bank on Park Avenue in Park City. We have three staff people and a board of 12:

Board of Trustees

Michael O'Malley, President
Richard Sheinberg, Past President
Frederick Vallejo III
Robin Altschuler
Debi Scoggan
Glen Mintz
Michael Howard

Lawrence Stevens
Tonja Hanson
Craig Stevens
Michael Barille
Kurt Peterson
ex-officio: Cindy Matsumoto, Park City Council
ex-officio: Anita Lewis, Asslt Summit Co. Mgr.

Staff

Executive Director, Cheryl Fox
Director of Conservation, Erin Bragg
Outreach and Development Director, Megan Fernandez

History

The Summit Land Conservancy was initially founded as Conserving Our Open Lands, or COOL in 1998 with a grant from the Park City Arts Council and a book project that generated its first \$5,000. The organization has had paid staff since its inception. In 2002, the board of trustees incorporated as an independent non-profit organization and in 2004 the name was changed to the Summit Land Conservancy.

Accreditation

In 2010 the Trustees of the Summit Land Conservancy initiated the application process for accreditation with the Land Trust Alliance. The Alliance is a national organization dedicated to saving open spaces by building strong grass-roots land trusts, like the Summit Land Conservancy. The accreditation process was time consuming and expensive as it analyzed all aspects of our organization from governance and

3. Monadnock Conservancy (MC)



Land Steward Information Form

The Monadnock Conservancy is a regional land trust whose purposes are to identify, promote, and actively seek protection of lands with natural, aesthetic, and historic significance in the Monadnock region; and to monitor and enforce the protection of lands in the trust. The Monadnock Conservancy was founded in 1989 by a group of volunteer leaders residing in the towns the Conservancy serves.

Currently, land stewards monitor 150 properties annually. The Monadnock Conservancy is looking for dedicated volunteers to walk protected lands, talk with landowners, collect information, and report their findings. Training includes an annual, mandatory workshop covering the basics of a conservation easement, survey map interpretation, basic natural history, and orientation to the assigned properties. Following this workshop, each land steward receives individual training from a staff member on a monitoring visit. Please note: monitoring can involve walking for several hours through rugged terrain.

Completing monitoring visits often allows land stewards to explore some unique protected areas in the Monadnock region while providing valuable information to assist with easement stewardship. The overall time commitment for volunteer land stewardship averages about 24 hours per year. To become a land steward, please fill out the information below and return it in the stamped envelope provided. If you have any questions, please call Emily Hague at 357-0600, or email Emily at Emily@monadnockconservancy.org.

Name: _____
Street: _____
Town, State, Zip: _____

Email: _____
Home phone: _____ Office phone: _____
Occupation: _____
Place of employment: _____

Why would you like to become a land steward?

Over, please →

4. Coastal Mountains Land Trust (CMLT)



A NEWSLETTER FOR COASTAL MOUNTAINS LAND TRUST VOLUNTEERS

NOTE FROM THE STEWARDSHIP DIRECTOR

Dear Land Trust Volunteers:

With spring in full bloom and summer just around the corner, the Land Trust is very excited to launch its schedule of volunteer workdays, projects, and events for 2013. As you know, each of these activities are important to allowing the Land Trust to accomplish its mission of permanently protecting the natural and human communities of Western Penobscot Bay.

We are proud to say that we are beginning this year with the strongest corps of active volunteers in the Land Trust's 27 year history—175 people! Thanks to a renewed commitment to involving volunteers in all aspects of our work, we continue to add new energy across the organization. Thanks to each of you for the time and energy you bring to the Land Trust. Without you, we would not be able to accomplish and sustain the level of success we have achieved.

As our volunteer program has grown, so too have our efforts to ensure that you are able stay in touch and in tune with the volunteer projects going on throughout our service region. To this end, I invite you to take a moment to review the schedules of trainings and volunteer opportunities listed in this newsletter as you consider how you would like to be involved with the Land Trust. Additionally, I also encourage you to stay in touch by email with our volunteer coordinator, Amy Faunce, and to monitor the regularly updated volunteer page on our website which can be found at: http://www.coastalmountains.org/get_involved/volunteer.html

As always, we welcome any comments, questions or suggestions that you may have about how we can improve our volunteer program. I hope to see you in the woods or at the office in the near future. In the meantime, stay in touch, stay safe and have fun.

Best,

2013 VOLUNTEER TRAINING SCHEDULE

Please RSVP for any event you plan on attending

Orientation for New Volunteers

Contact Volunteer Coordinator, Amy Faunce at volunteers@coastalmountains.org to arrange a time to come by the office.

Stewardship Training Event #1: Field Skills Practicum - Map, Compass & Boundary Marking

Saturday, June 1st, 9am– 12:30 pm. Meet at the Land Trust's Head of Tide Preserve in Belfast.

Stewardship Training Event #2: Field Skills Practicum - Identification of Invasive Plants of the Midcoast

Wednesday, June 12th, 6 - 7:30pm. Slide show / talk at the Land Trust office in Camden.

Stewardship Training Event #3: Field Skills Practicum - Butterflies & Dragonflies of the Midcoast

Wednesday, July 10th, 8:30am. Meet at the Camden Snow Bowl for a walk led by volunteer Roger Rittmaster. Co-sponsored by Camden Conservation Commission.

Stewardship Training Event #4: The Maine Water Company Conservation Easement Walking Tour, Rockport

Tuesday, September 17th, Noon– 4pm
Join fellow volunteers for a BYO picnic lunch, walking tour and discussion of one of our exciting new conservation easements.

Stewardship Training Event #5: Chainsaw Training for Stewardship Volunteers

Date TBD, One-day course to be offered for volunteers willing and interested in helping maintain trails and preserves. **Let Ian know if you are interested.**

Stewardship Training Event #6: Birds of Beech Hill Winter Slide Show

Winter Date TBD: Join Beech Hill steward Brian Willson for as he presents slide of birds and life on Beech Hill from his daily visits through the year.

COASTAL MOUNTAINS LAND TRUST
101 MOUNT BATTIE STREET, CAMDEN, ME 04843— 207.236.7091— WWW.COASTALMOUNTAINS.ORG



THE STEWARD

Page 2

Fernalds Neck Preserve, Lincolnville & Camden



BRIDGE BUILDERS: NOW AND THEN

On an afternoon in March, the Volunteer Trail Crew (South) decided it was time to set down its tools, step out of the woods, and gather together for happy hour at Graf-fam's Restaurant in Camden. We wanted to take a moment to celebrate all of the trail, bridge and boundary maintenance work the crew had accomplished over the fall and winter. One of the highlights of the evening revolved around a discussion of the Hodson Preserve bridge built by Bud Spalding in the early 1990s (right) and rebuilt with the help of Dan Johnson (left) and crew in 2012.

VOLUNTEER COORDINATOR: AMY FAUNCE

With over 175 active volunteers assisting with stewardship, outreach and office projects throughout the year, we're very thankful to have Amy Faunce of Camden who continue to serve as our Volunteer Coordinator for 2013. A past recipient of our Zwartjes Volunteer Award, Amy has and continues to devote many, many hours to Land Trust efforts in the field and office.



Amy helps orient new volunteers, match people with their project interests, and keeps everyone up-to-date with our ambitious schedule of volunteer activities. Amy can be reached by email at volunteers@coastalmountains.org or by calling the office at 236-7091.

Volunteer Thank You BBQ

Join us Wednesday, September 12th, 5-7pm for a barbecue and social gathering for all Land Trust volunteers and family at the Land Trust office.

Bring nothing. This is our opportunity to say thanks.

SAVE THE DATE

Conservation Statistics 1986 – 2013

Our Land Trust has protected 9,152 acres of land including:
25 Preserves containing 64 tracts, totaling 4,396 acres,
55 Conservation Easements, totaling 3,313 acres,
and 1,443 acres through projects facilitated by the Land Trust.



THE STEWARD

Page 3

Long Cove Headwaters Preserve, Searsport

New Preserve Summary:

A few words about one of our newest properties...

With the help of the newly organized Volunteer Trails Team (North) headed by Skip Pendleton of Belfast, the Land Trust is pleased to have recently completed the first phase of developing improved public access to the Long Cove Headwaters Preserve in Searsport. If you haven't yet had a chance to set foot on this beautiful 455-acre forested property, I urge you to pay a visit.

As built, the trail system now offers two loops through the Preserve's expansive forest—the blue loop is a gentle 1-mile along an old woods road that rises slightly over and through the former Savery farm property. The red loop is a longer 2.5-mile exploration of the Preserve which brings

you through a range of forested habitats. Both places offer a great chance to see forest birds and other wildlife. Given the amount of moose droppings one finds along the trails, it should be a great place to see moose! Of course, I haven't see one yet.

To access the Preserve, drive north on Route 1 into Searsport, turn left onto the Mt. Ephraim Road. Follow the Mt. Ephraim Road approximately 2.6 miles until you reach the Savery Road. Turn right onto the Savery and drive approximately .5 miles until you find the Preserve sign and parking on the right side of the road.

2013 PRIORITY STEWARDSHIP PROJECTS

Bald Mountain Preserve

- New parking area
- Trail extension construction
- Building removal

Beech Hill Preserve

- Beech Nut maintenance
- Trail maintenance
- Blueberry farm field management
- Invasive Russian olive control work

Ducktrap River Preserve

- Japanese knotweed control project
- Boundary marking
- Trail maintenance

Fernald's Neck Preserve

- Fernald's Neck Stewards Program

- Trail work & boundary marking

Hatchet Mountain Preserve

- Boundary marking
- Trail maintenance
- Summit viewshed clearing

Head of Tide Preserve

- Invasive plant control work
- New trail construction

Long Cove Headwaters Preserve

- New trail construction
- Signs & new kiosk

McLellan-Poor Preserve

- New parking area
- New trail construction

Murray Preserve

- Ecological inventory

Newman Preserve

- Boundary maintenance

North Forest Preserve

- Boundary marking

Ragged Mountain Preserve

- Boundary marking
- Trail maintenance

Stover Preserve

- Invasive honeysuckle control work
- Trail work

Young's Neck Preserve

- New trail monitoring



THE STEWARD
Page 4

Beach at Murray Preserve, Lincolnville

2013 STEWARDSHIP VOLUNTEER TEAMS

DUCKTRAP RIVER PRESERVE STEWARDS PROGRAM Join our efforts to monitor and manage the Ducktrap River Preserve. We need help monitoring, managing knotweed, and maintaining boundary lines. Let us know if you are interested. Training provided. Ongoing knotweed work parties are scheduled every other Friday through October.

TRAILS & BOUNDARIES TEAM (North and/or South) We now have two trail crews carrying out regular maintenance and new construction throughout the Land Trust Preserve system this spring, summer and fall. Key projects include more Bald Mountain trail work (South) and the Head of Tide Preserve trail (North). Please let us know if you'd like to take part. Training to be provided. Workdays each Wednesday (South) and Friday (North)—see website for details.

RAGGED MOUNTAIN PRESERVE STEWARDS TEAM Want to help take care of the Round the Mountain and Five Brooks Trails on Ragged Mountain? We're building a team of hikers, mountain bikers and nordic skiers to work together to care for this great trail system. Training provided.

BEECH HILL STEWARDS TEAM Interested in helping to monitor Beech Hill throughout the year? We continue to grow a team of monitors that regularly walk the hill and report back to the Land Trust. Let us know if you are interested. Training provided.

PASSAGASSAWAKEAG PRESERVE STEWARDS TEAM Interested in joining a committed team of volunteers in Belfast that are working to take care of our Passy area Preserves? Trail work, invasive Japanese honeysuckle control, and field mowing. Volunteers work together 2-3 hours each week (currently Thursday at 8am) throughout the spring and summer. Let us know if you are interested.

FERNALD'S NECK / YOUNG'S NECK STEWARDS Want to serve as a monitor for Fernald's Neck and Young's Neck Preserves during the peak summer months? Help us keep an eye on these beautiful places, and help to ensure that the use guidelines are enforced. Contact Stewardship Director, Ian Stewart, if you are interested in helping out. Training provided. Initial field meeting will occur in early June.

BALD MOUNTAIN STEWARDS TEAM Like exploring Bald Mountain? Would you like to help us monitor the Bald Mountain trail, maintain boundaries and do a number of other small projects around the mountain. Join our team. Initial meeting is Tuesday, May 28th at 9am.

***** TO GET INVOLVED AT ANYTIME SEE OUR WEBSITE AT *****
www.coastalmountains.org/get_involved/volunteer.html
Or contact us by phone at 236-7091 or email at volunteers@coastalmountains.org

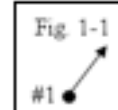


5. Virginia Outdoors Foundation (VOF)



Easement Steward Volunteer Guidance Document

Volunteer Easement Stewards serve as representatives of the Virginia Outdoors Foundation (VOF) and share responsibilities with stewardship staff for the routine monitoring and inspection of ~~privately owned properties~~ under conservation easements. The principle role of the volunteer easement steward is to observe and document any changes that take place on the easement property. The steward will visit their assigned properties on a routine basis during a time frame arranged with the landowner. During the visit, the steward will meet with the landowner or property manager if possible, and conduct a walking tour and physical inspection of the interior of the property and boundaries. Notes are made of any observed changes and relevant information obtained from the landowner, photos are taken as necessary, and the *Easement Steward Monitoring Form* is completed and submitted to the stewardship staff liaison or regional office volunteer coordinator soon after the visit. Record the location and direction of all photographs on the provided map(s), using the dot and arrow symbol as represented in Fig. 1-1.



VOF staff will determine whether any documented changes are consistent with the conservation values protected by the terms of the deed of easement and implement proper enforcement action if necessary.

Volunteers shall make VOF aware of any properties that are owned by themselves, neighbors, family member, or other close relation. Volunteers shall not use the volunteer program as a means of advancing any personal or professional benefit from the property or its owner. By signing the monitoring form, the volunteer provides their certification to this fact.

VOF Staff will set up a shared folder on the **VOF Box** (online storage site) for you to upload all completed forms, photos and time logs.

Monitoring Guidelines for Volunteers

Prior to Site Visit:

- ✓ Coordinate with VOF staff to obtain or confirm list of properties for monitoring.
- ✓ Review previous monitoring reports and/or baseline documentation, including photos and maps.
- ✓ Contact the landowner or property manager to arrange the site visit.
- ✓ Verify with the landowner any changes in ownership, subdivision, boundary line adjustment, resource extraction and/or new construction or demolition.
- ✓ Prepare for the site visit by arranging the following things to take in the field:
 - Field copy of BDR or subsequent monitoring reports and accompanying photographs
 - Field map(s)
 - Wear appropriate clothing
 - Plenty of water and/or food
 - Sunscreen
 - Insect repellent
 - Camera
 - Compass

During the Site Visit:

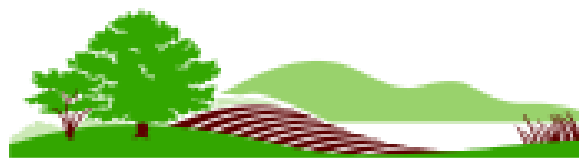
- ✓ ~~Initial site visits will be accompanied by your stewardship staff liaison or regional volunteer coordinator.~~
- ✓ Meet with the landowner or property manager if necessary.
- ✓ Walk and/or drive around and view as much of the property boundaries and interior as possible.

February 2013

- ✓ Pay particular attention to any changes and improvements on the property; document any changes on the form and with photos, and report it to your stewardship staff liaison or regional volunteer coordinator.
- ✓ Use the field map to document your monitoring route, the location of any changes, and photograph direction
- ✓ During your contact and communications with the owner of the easement property, always be polite, respectful, courteous, and professional – remember, you are a representative and ambassador for VOF. Do NOT make any representations as to whether or not a change observed on the property, or a pending change or activity contemplated by the landowner, is consistent with the terms and conditions of the conservation easement or not. You are there specifically to document changes that occur on the property (or that might occur, based on information obtained from the landowner), regardless of whether or not the changes are in conformance with the easement restrictions. It is stewardship staff's responsibility to interpret the terms and conditions of the conservation easement and communicate that interpretation to the landowner. VOF will follow up with landowners regarding any changes observed and described by the steward and reported, as necessary. If a landowner has questions about the easement, or is argumentative for any reason, have them contact your stewardship staff liaison.
- ✓ Do not use the site visit to gain any personal or professional benefit from the property or its owner.

After the Site Visit:

- ✓ Complete the *Easement Steward Monitoring Form*.
- ✓ Provide VOF staff with completed *Easement Steward Monitoring Form(s)*, field map(s) and photographs within one week of the date of your site visit. Forms shall be submitted via your **VOF Box** folder.
 - Be sure to keep a copy of such material for use in subsequent monitoring visits.
- ✓ Call your stewardship staff liaison or regional volunteer coordinator immediately if there were significant changes observed on the property or if there are any urgent problems that need to be resolved.
- ✓ VOF staff will process the *Easement Steward Monitoring Form(s)*, photo(s) and field map(s) accordingly
- ✓ Please fill out a [VOLUNTEER TIME LOG](#) sheet at the end of each day.
 - At the end of the month please submit all VOLUNTEER TIME LOG sheets to your staff liaison or regional volunteer coordinator for processing via your **VOF Box** folder.



VIRGINIA OUTDOORS
FOUNDATION

CONFIDENTIAL

First Name: _____ Middle Name: _____

Last Name: _____

Former Name(s) and Dates Used: _____

Current
Address: _____

Lived year since: _____

Previous Address
From: _____

Lived here from _____ to _____.

Social Security Number: _____

Date of Birth: _____

Telephone Number: _____

Drivers License Number/State: _____

I authorize the Virginia Outdoors Foundation or a reasonably equivalent investigative search service to perform criminal, background and driving record searches on me. I do hereby release and agree to hold harmless the Virginia Outdoors Foundation and its agents, employees, volunteers, officers and directors from liability in utilizing this information for the purposes of evaluating me for employment or volunteer service for the Virginia Outdoors Foundation.

Signature: _____

Date: _____



VOF Control Number: WES-1967
 Easement Donor/Owner Name: Doe

GEOGRAPHIC IMAGERY MONITORING FORM

(Please print all information)

Monitor Name (first and last): **Maureen Ramsey**

Monitoring Date: **5/29/2012**

Current Landowner Name (first and last): **John Doe**

Easement Polygon ID: **1967**

Monitor Type (check one): Staff Intern Volunteer

i. If no changes are found, map using a corresponding ox below.

Imagery Sources and Dates:		
"Before" Source: 2009 VBMP	"After" Source: 2011 NAIP	Other Source:
"Before" Date:	"After" Date:	Other Date:

Answer the following questions and include descriptions as appropriate. Check box 'Y' for Yes and 'N' for No.

Buildings, Structures, Roads, & Utilities	Y	N	Description
New buildings, structures, or demolition visible on Property?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
New roads or trails visible on Property?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
New utilities visible on Property?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Industrial or Commercial Activities	Y	N	Description
Industrial or commercial activities visible on Property?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Management of Forest	Y	N	Description
Timbered area(s) visible on Property?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Riparian Buffer	Y	N	Description
Disturbance near waterways visible on Property?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Trash, equipment and/or material storage visible near to or within waterways?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Grading, Blasting, Filling & Mining	Y	N	Description
Excavated soil visible on Property?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Heavy equipment visible on Property?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Other Changes Visible on Property
 A large timbered area and several smaller cleared sections or excavations are visible. The fact that the property owner had a contract for "commercial thinning" of a section of forest was mentioned in the EMA.

This report and the attached maps accurately depict, to the best of my ability, the condition of the property on the dates of the imagery sources listed above. I also hereby state that the monitored property is not owned by a neighbor, family member or other close relation, and that I did not receive any personal or professional benefit from the property or its owner during this monitoring session.

Signature of Monitor

5/1/12

Date of Monitoring Report

PolyID number :	1967	Monitored by: Maureen Ramsey
Control Number:	WES-1967	Date: 5/29/12
Before Imagery:	2009 VBMP	
After Imagery:	2011 NAIP	

See page 3-6 for details

2009 VBMP:



2011 NAIP:



2009 VBMP:



2011 NAIP:



2009 VBMP:



2011 NAIP:





Landowner Survey Volunteer Guidance Document

The role of the volunteer performing Landowner Surveys is to make contact with our landowners and/or property managers on behalf of stewardship staff. Volunteers may reach out to landowners via phone or email interview to answer the basic property questions listed on the survey form. Should volunteers not be able to reach landowners via phone or email, please notify VOF Staff, and Staff will send a cover letter and a SASE with the *Landowner Survey Monitoring Form*. Otherwise, volunteers shall follow the instructions as listed below to complete the *Landowner Survey Monitoring Form*.

VOF staff will determine whether any documented changes are consistent with the conservation values protected by the terms of the deed of easement and implement proper enforcement action if necessary.

Volunteers shall make VOF aware of any properties that are owned by themselves, neighbors, family member, or other close relation. Volunteers shall not use the volunteer program as a means of advancing any personal or professional benefit from the property or its owner. By signing the monitoring form, the volunteer provides their certification to this fact.

After completion of the surveys, provide VOF staff with all documentation, and VOF staff will process the form(s) accordingly. Please fill out a [VOLUNTEER TIME LOG](#) sheet at the end of each day. At the end of the month, submit all VOLUNTEER TIME LOG sheets to your regional volunteer coordinator for processing.

VOF Staff will set up a shared folder on the **VOF Box** (online storage site) for you to upload all completed surveys and time logs.

Phone Script If Someone Answers:

Hello, may I please speak with _____. (*name of owner, or property contact*)

Hi, Mr./ Ms. _____. My name is _____ and I am a volunteer calling on behalf of the Virginia Outdoors Foundation regarding the _____ acre conservation easement on your (*or name of owner, Trust, or LLC*) property in/on _____ (*name of road or town*)

We're in the process of updating the records for your easement property, and I would like to take the time to ask you a few questions if you have a moment. (*if they indicate they don't have the time to speak, ask them if they would prefer you to call at another time, or if they would like to call us back, thank them, and then make a note on the EMA sheet*)

First, I'd like to update and verify your contact information

(it may be easiest if you read what contact information we have in the owner/contact field to them and verify with them if its correct. If there are any types of contact missing, such as email, you can ask them if they want to provide it)

Mailing Address:

Home Phone: Work Phone: Cell Phone:

Email Address: Fax:

Is there any other person that you would like us to have down as a contact for the property?

Other Contact Person (first and last): _____ Relationship to Owner: _____

Mailing Address: _____

Home Phone: _____ Work Phone: _____ Cell Phone: _____

Email Address: _____ Fax: _____

The last visit to your property was completed in _____ (year). Have there been any changes to your property since that time such as:

- Sale of the Property
- Internal or External Subdivision
- Boundary Line Adjustment
- New Construction or Demolition
- Timbering, Mining, or Grading
- VDOT Right of Way or Utility Easements
- Other (e.g., Natural Alterations, Buffer Additions, Industrial or Commercial Activities, Signs, etc.)

If they say yes to anything, try to get as much information or details as they will provide

Do you have any questions or concerns that you would like to discuss with a VOF staff person regarding your easement?

(If yes, let them know that _____ the staff representative for _____ County will be calling them back. If they try to ask you questions, just explain that you are a volunteer and it would be best for them to speak to a staff member. If they have any questions, try to get specific questions from them)

Thank you for taking the time to speak with me today and answering our questions.

Phone Script If No Answer:

Hello, My name is _____ and I am a volunteer calling on behalf of the Virginia Outdoors Foundation regarding the conservation easement on your property in/on _____ (name of road or town) We're in the process of updating the records for your easement property, and we would like to take a few minutes to ask you a few questions. At your earliest convenience, please call me back at _____ (your phone number). Thank you.

- *Make note of date you called on EMA sheet and if a message was left*

Email Script:

Dear Mr. & Mrs. _____,

I am writing you today to ask for your response to a few questions regarding your conservation easement property located in _____ County. The Virginia Outdoors Foundation (VOF) has recently begun to monitor all of our easement properties on an annual basis if possible. In an effort to save travel costs, we have decided to reach out to our landowners via email or telephone to determine if any changes have occurred on the property and to see if you have any questions or concerns regarding your easement. Please respond to the

questions below and return to me at your earliest possible convenience. We will still be conducting on-site monitoring events every two to three years, and utilizing this survey in the interim years.

- 1.) Has the property been conveyed or sold to another party since the last monitoring visit?
- 2.) Has any internal or external subdivision occurred on the property?
- 3.) ~~Have~~ there been any boundary line adjustments performed on the property?
- 4.) Has there been any new construction or demolition of buildings, structures, roads, etc. on the property?
- 5.) Has any timbering, mining, or grading occurred on the property?
- 6.) Have there been any VDOT Right of Ways (ROW) or utility easements established on the property?
- 7.) Have there been any other miscellaneous changes to the property (e.g., natural alterations, riparian buffer changes, industrial or commercial activities, signage, etc.)?

Regards,

Stewardship Volunteer



Volunteer Field Procedures

Questions? Contact our volunteer program coordinator at (804) 786-9603.

To ensure the integrity of the Virginia Outdoors Foundation Stewardship Program, field volunteers must adhere to the following general procedures:

- Contact landowner and set up site visit time that is suitable for them.
- Carry a cell phone and make sure that your project supervisor has the number.
- Check in and check out with your project supervisor before and after you complete a site visit.
- Obtain and study the BDR and/or past field report for the property from your project supervisor.
- Walk the accessible portions of the property and document on the field map(s) and/or photograph any potential changes on property.
- Be respectful of the property; close gates that you open, avoid interaction with pets and livestock, do not disturb areas such as gardens, farming operations, active construction sites, etc.
- Complete the Easement Steward monitoring form.
- Submit report and photos to your project supervisor within two weeks of completion of the monitoring event.
- Maintain your volunteer time log and submit to your project supervisor at the end of each month.
- Do not interpret the terms of the easement with anyone, including the landowner; simply observe and record.
- Do not talk with landowners about potential violations or concerns. Report them to your project supervisor who will research the facts and follow-up with the landowner.
- Report all potential issues to your project supervisor immediately.
- Volunteers may not use monitoring visits to advance personal interests or activities, such as business interests, real estate interests, or activities of other organizations

January 2012

6. Estes Valley Land Trust (EVLТ)

1. Annual Stewardship

- 1.1. All conservation easements and fee properties are subject to an annual site visit in order to monitor compliance with the easement terms. These site visits ideally are within 11-13 months of the prior year's site visit, though some flexibility in that range is possible. However, there is no flexibility regarding the annual monitoring requirement. Each easement must be visited each year.
- 1.2. EVLT has a team of about 95 volunteers who accomplish most of this monitoring. If a property has had problems with violations or near-violations in prior years, a staff or Board member is assigned to that property. Most properties (especially those over 5 acres in size) are assigned a Monitor Partner in addition to a Lead Monitor. The Lead Monitor is responsible for contacting the landowner, scheduling appointments, guiding the site visit, and completing the report. The Monitor Partner fills several important roles:
 - For each property, the Partner is a knowledgeable back-up person who knows the property in case the Lead Monitor is unable to continue with his/her duties;
 - For safety reasons, it is good to have a second person on the site visit.
 - A second set of eyes on the property can sometimes detect issues that one person might not notice. This adds a validation to the monitor report.
 - The Monitor Partner can receive training from the Lead Monitor as part of the site visit. Most new monitors are assigned to "Partner" positions for their first year.
- 1.3. In April of each year, each volunteer monitor is contacted with a survey to determine their monitoring interests for the coming season. Doc 6a1 is the cover memo for the survey. Doc 6a2 questionnaire is sent to monitors who were assigned to properties the prior year to determine if they wish to stay assigned to the same properties, with the same partner. Doc 6a3 questionnaire is sent to new monitors to ascertain the challenge level they want in their monitoring assignments. After most of the questionnaires are returned, EVLT reviews the preferences and the open positions in order to complete the monitor assignments for the year.
- 1.4. In late May/June of each year, volunteer monitors are informed of their assignments at an annual Monitor Appreciation and Training Luncheon. (About 75% of the monitors attend the luncheon; the remainder have to be contacted through make-up training sessions or individual contacts.) At that luncheon, each monitor is given a packet that contains:
 - A. The monitor's name badge and blank business cards (Doc 6b1) to use if questioned (e.g. by neighbors) in the field
 - B. The monitor assignment list (Doc 6b2)
 - C. The Monitor Task Instructions (Doc 6b3)
 - D. Photography Instructions (Doc 6b4)
 - E. Bark Beetle Statement (Doc 6b5)
 - F. Weed/Thistle information (Doc 6b6)
 - G. Postcards that the monitor can use to remind landowners of appointment times (Doc 6b7)
 - H. Monitor forms for all of the properties on which they are a Lead or Partner Monitor (Doc 6b8)

- 1.5. In June, a letter (Doc 6c) is sent to each landowner thanking them for their stewardship, and notifying them to expect to be contacted for a site visit.
 - 1.6. All monitors are asked to complete their monitoring by October 1. If they do not complete it by that date, repeated reminders encourage them to complete the task. Occasionally, a Board or Staff member has to be called upon to complete the monitoring for a particular easement for the year.
 - 1.7. When the monitor report is received, it is reviewed by the Director of Operations to determine if any follow-up actions are required. Sometimes a potential violation may be referred to the Legal Committee (See Section 7). Copies of the form, the photo documentation and any site visit gps tracks are compiled into packets for the office binders, the archive files, and the monitor's binder.
 - 1.8. The Easement database record is updated with date tracking data as well as updates to owner data. (Doc 6d)
-

April 30, 2012

Dear Estes Valley Land Trust Monitor:

Welcome Spring! This beautiful warm weather is reminding all of us that another monitoring season is coming soon. On behalf of the Board of the Estes Valley Land Trust, I would like to thank you for your past dedication to this critical part of the Estes Valley land conservation activity, and invite you to join us once again for the 2012 season.

We invite and encourage you to attend our monitor training and appreciation luncheon on Tuesday, May 22, at 11:30 in the YMCA's Walnut Room. This occasion is a great opportunity for you to meet and share stories with your fellow monitors, to learn about the changes in the program for the coming year, to review the monitoring process and reporting requirements, and to pick up your 2012 Monitor Information Packet with your monitoring assignments for the year.

We are implementing a few procedural changes for the coming year, which makes attendance at our training event even more critical for all of our volunteers. If you cannot join us on May 22, we have two alternative training meetings, both held in the George ~~Box~~ Room at US Bank: Saturday, June 9 at 10:00 a.m., or Wednesday, June 20 at 10:00 a.m. (No luncheon will be provided, but I bet we can bring a few refreshments!)

On the enclosed questionnaire, please let us know which of these events you will be able to attend. Also, please let us know if you would like any changes in your assigned easements and partners for the coming year. We want our volunteer monitors to feel satisfied with their assignments! Finally, please note any changes in your contact information (especially check your email address). **Remember that these are not the final assignments for the year.** Adjustments will be made after the questionnaires are all returned, and your final assignments will be provided in your 2012 Monitor Information Packet.

Return your questionnaire by May 11.

An addressed envelope is enclosed that can be used for this purpose. Contact the EVLT office if you have any questions about this process. Thank you again for your continued help and I look forward to seeing you at the YMCA!

Sincerely,



Mary Banker
Director of Operations

2012 EVLT Monitor Questionnaire

PLEASE UPDATE YOUR CONTACT INFORMATION.

Name: Kim Barrier

Address: 129 Alpine Dr., Estes Park, CO 80517-8042

Telephone: 970-586-1867 E-mail: plbarrier@msn.com

Will you attend the May 22 Monitor Training and Appreciation Luncheon? yes no
(May 22, 11:30 a.m. – 1:30 p.m. in the YMCA Walnut Room)

If not, please indicate which alternate training time you could attend:

Saturday, June 9 at 10:00 a.m. (in U.S. Bank George Hix Room)

Wednesday, June 20 at 10:00 a.m. (in U.S. Bank George Hix Room)

None of the above—please contact me to make alternative arrangements

PLEASE NOTE BELOW YOUR MONITORING PREFERENCES (PARTNERS AND/OR PROPERTIES).

Your Current Assignments:			Your preference for this monitoring assignment (check one)		
Easement	Lead Monitor	Monitor Partner	Keep as is	Assign new Monitor Partner	Assign new monitor
Nordic I	Kim Barrier	Lynn Weissenrieder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hughes	Kim Barrier	Terry Rizzuti	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nordic II	Kim Barrier	Lynn Weissenrieder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Are you interested in monitoring additional properties? yes no

Comments: _____

Return to:

Estes Valley Land Trust
PO Box 663
Estes Park, CO 80517

OR

EVLT Office
1191 Woodstock Suite 5
Estes Park, CO 80517

Please return completed questionnaire by MAY 11.



Site Visit Reminder

This card is to remind you that we are scheduled to visit your conservation easement property for a monitoring site visit on

_____.

Please contact me at _____ if this appointment needs to be changed.

Thank you! Lead monitor: _____

Estes Valley Land Trust Monitoring Guide

The mission of the Estes Valley Land Trust is to preserve and protect open space, valleys, wetlands, streams, ranch lands, and wildlife habitat in the Estes Valley and surrounding area. Lands adjacent to Rocky Mountain National Park and the Arapaho-Roosevelt National Forest are of special concern.

Thank you for volunteering your time in support of Land Conservation. The conservation successes of the Estes Valley Land Trust (EVLТ) are possible because of a dedicated crew of members, supporters and volunteers who contribute their time and their resources toward this worthy mission. EVLT conserves land primarily through the use of Conservation Easements.

What is a Conservation Easement? A conservation easement is a legal voluntary agreement between a landowner and a land trust or government agency that permanently limits uses of a parcel of land in order to protect the land's conservation values. It allows landowners to continue to own and use their land, and they can also sell it or pass it on to heirs.

When a landowner donates a conservation easement to a land trust, the landowner gives up some of the rights associated with the land. For example, the landowner might give up the right to build additional structures, while retaining the right to graze cattle. Future owners also will be bound by the easement's terms.

The land trust is responsible for making sure the easement's terms are followed. This is managed through "stewardship" by the land trust. Part of this stewardship is accomplished through annual site visits to the conserved property to monitor the compliance with the terms of the conservation easement. This annual monitoring is crucial to the assurance that the land will be conserved forever.

With some conservation easements, landowners receive federal and/or state tax benefits from their donation; thus, a rigorous set of standards and practices has been developed for conservation easement projects by the Land Trust Alliance (www.lta.org) to assure compliance with IRS and State Tax Code. In order for a land trust to be accredited, it must demonstrate adherence to these standards and practices for all of its conservation easements.

EVLТ achieved accreditation by the Land Trust Accreditation Commission in 2008, and is going through an accreditation renewal review in 2013. Your actions as volunteer monitors are vital to a successful renewal process for EVLT.

Please use the task lists on the following pages to ensure that EVLT's monitoring processes are consistent and follow LTA best practices.

LEAD MONITORS AND MONITOR PARTNERS

On most properties, we are trying to assign both a *Lead Monitor* and a *Monitor Partner*.

- The Lead Monitor for each property is responsible for most of the tasks identified in this guide, including setting appointments and completing monitor reports.
- The Monitor Partner role has several purposes:
 - Serves as a back-up person who is knowledgeable about the property, its landowner and its boundaries. In future years when a Lead Monitor "retires" or moves away, a knowledgeable Monitor Partner can step into the Lead role;
 - Provides a safety net in case there are mishaps on the field visit;
 - Provides a second set of eyes for validating monitor observations;
 - Provides a good training opportunity for new monitors;
 - For new properties, an EVLT Board Member is assigned to the Partner role for the first year to introduce the Lead Monitor to the property.

Tasks for the Monitor Partner include:

- a. Accompany Lead Monitor on the site visit.
- b. Get to know the property boundaries, and the owner if possible.
- c. Assist monitor with photo and ~~gps~~ activities as necessary.
- d. Identify any concerns you notice to the Lead Monitor.

Prior to visit:

- a. Lead Monitors should have an easement binder for every property to which they are assigned as Lead Monitor. Contact the EVLT office (evlt@evlandtrust.org or 577-6837) if you do not have an easement binder for a property. Due to production costs, Monitor Partners do not get their own copy of the binder, but Lead Monitors are encouraged to share information.
- b. Review the following:
 1. Baseline maps in binder
 2. Photos
 3. Easement permitted and prohibited uses in the Deed of Conservation Easement
 4. Past monitor reports
 5. Information requested in this year's monitor report form.
- c. Based on that review, prepare an easement inspection checklist for the property, listing those items that you specifically need to check during this inspection.
- d. By June 30, the EVLT Office will send a letter out to each landowner thanking them for their land stewardship, telling them who their monitor(s) will be for this year, and telling them when last year's site visit took place and to expect this year's site visit to be around the same date. (NOTE: PLEASE TELL US BEFORE JUNE 20 IF YOU HAVE TO CHANGE MONITORING ASSIGNMENTS OR DATES.) (FYI—this letter also will include an offer to each landowner for EVLT sign(s) for their property.) EVLT Office also will send a copy of that letter to the easement monitor for the monitor binder (and we will send it to monitors within a day or two after sending to landowner rather instead of holding it for year-end package of all binder paperwork.)
- e. The Lead monitor for each property is responsible for contacting the owner and the monitor partner to set up site visit appointments. Contact those people to make arrangements in early July, even if the site visit is not for several months. If you learn that the property has changed ownership, contact the office before completing the site visit. About a week or two before the scheduled site visit, mail an appointment confirmation postcard (enclosed) to the landowner.
- f. Have the property owner join you if possible. (If the owner cannot join you for the site visit, ask the questions in section 3 of the report form during the phone call.) If you cannot reach the property owner after repeated attempts, use the appointment confirmation postcard to notify the landowner about when you plan to be there.
- g. The 2013 site visit date must be within 11-13 months of the 2012 monitor visit, but no later than October 1. Please make the visit closer to 11 months if at all possible!

THE SITE VISIT

What to take on the site visit:

- a. Take your easement inspection checklist, a working copy of your monitor report, and map copies for reference.
- b. Take a camera to photograph any issues, violations, and general conditions. EVLT office has a digital camera that can be checked out by monitors. (See the Photographic Documentation Guide for details about photographing the property.)
- c. If you know how to use a GPS it can be useful, especially for large properties, to record photo locations and help find property boundaries. EVLT office has a Garmin personal navigation unit that can be checked out. Also, the office can load property outlines and photo points into your unit. (Please contact the EVLT office for details on GPS usage.)
- d. Wear or bring your name badge and business cards to help you identify yourself to owners and bystanders.
- e. EVLT has magnetic car door signs that can be checked out if you desire an "official" presence on site.

The monitoring process:

- a. Ask the property owner about
 - Changes in the condition of the property;
 - Impending construction (remind them to notify EVLT office with plans if they have not already done so);
 - Expected changes in ownership due to either transfer of ownership within the family or sale to an outside party.
- b. Check perimeter of property for any infringement or issues.
- c. Scan the interior of property for any changes in condition. Sometimes this requires hiking into the interior of the property to see conditions. Other times the entire property can be seen from the boundaries.
- d. If you notice problems with bark beetles and you think the landowner might benefit from guidance information, note in section 14 of the Monitor Report that you would like us to send out the Bark Beetle Information Sheet. These are not considered violations because they are not included in the easement language and are outside of the Land Trust's jurisdiction. However, in the interest of being a partner in land stewardship, when the monitor has noted a concern we will mail to the property owner information that might help with their mitigation efforts.
- e. If you notice large numbers of thistles or noxious weeds on a property, refer to the thistle and weed guides. Record information in section 6 and note in section 14 if you think the EVLT Office should send a copy of one of these booklets to a landowner. Again, these are not considered violations but the Land Trust strives to be a good partner in land stewardship.
- f. Photograph and report any changes or suspected violations of the easement. Also, every few years, a "full coverage" set of photographs should be taken at a set of

specific photo points. We will notify you when and how this needs to be done for your properties. (See the Photographic Documentation Guide for more details.

- g. Ask questions, but do not confront owners regarding infractions. Your job is to befriend the landowner. EVLT will address any enforcement issues. If a serious violation or infraction is discovered, call the Land Trust office immediately (577-6837).
- h. Complete your monitor report as soon as possible after the site visit.

THE REPORT

Monitor report contents:

- a. If possible, ask the landowner for any updates to section 3 during the appointment-setting phone call.
- b. In section 4, the Lead & Partner Monitors are listed. Section 16 includes the contact information for the Lead Monitor. Monitor Partner contact information is listed in section 4.
- c. Section 5 is designed to record detail about your site visit track and photo points. Sketch these locations onto the property outline map included in the form. Or, provide digital **gps** track if you have one.
- d. Section 6 is for recording issues that are significant enough to suggest that either we need to keep an eye on an emerging problem, or that action should be taken in the near future. Describe in enough detail to aid in that determination.
- e. In all sections, report your observations. Be concise and factual, but provide adequate detail.
- f. Reports should address whether the condition and use of the property are consistent with the baseline report and the reserved rights and prohibited uses of the property.

Submit your Monitor report:

- a. If and when you request them, digital copies of the forms will be emailed to you in MS Word (2010) format. If you cannot read that format, contact the office and we will work to get your forms to you in an alternative format. Each form will be in a separate doc. Please contact the office (evlt@evlandtrust.org) when you are ready to use a digital version of your forms. If the map work in section 5 cannot be recorded digitally, simply hand-write it onto the paper form just as you hand-write your signature.
- b. You do not have to use the digital form at all. You can use a pen and write your answers on the paper forms that are in your packet and turn those in.
- c. We encourage you to submit a digital copy of each monitor report; however, you also must submit a signed paper copy of the report, either by mail or in person, to the EVLT office. See the address at the end of the monitor form
- d. Please submit your report as soon as possible after the site visit.

ALSO AND THEN

Also submit to the EVLT office:

- a. If you have taken digital photos, submit them to the EVLT office in digital form (in lieu of or in addition to prints). We are able to accept copies on cd's, from flash drives or memory cards, or downloaded directly from the camera. (See the Photo Documentation Guide for more details.)
- b. If you have a **gps** or map record of specific photo points, also submit those to the EVLT office. (Contact the EVLT office for details on GPS usage.)
- c. Return your monitor packet, including your ID badge and your weed and thistles guides, to the EVLT office so that elements of it can be re-used next year.

Site visit follow-ups include:

- a. The EVLT office will initiate any landowner follow-up steps (regarding questions or violations) that must be taken.
- b. The EVLT office will NOT write a letter to the landowner summarizing results of the site visit.
- c. The EVLT office will produce for the monitor binder a copy of any correspondence with the landowner, a copy of the monitor report and any photos and **gps** documentation that was recorded for the easement, as well any information regarding reserved rights and easement enforcement issues. If baseline upgrade or "current conditions" reports have been produced, they also will be copied for monitor records.
- d. All documentation copies for each property for the year (except the June letter to landowners) will be held in the EVLT office for distribution at the following year's monitor luncheon. The monitor should file these documentation copies in their Easement Binder.

Sign and mail, deliver or email the completed form(s) to the EVLT before October 1st.

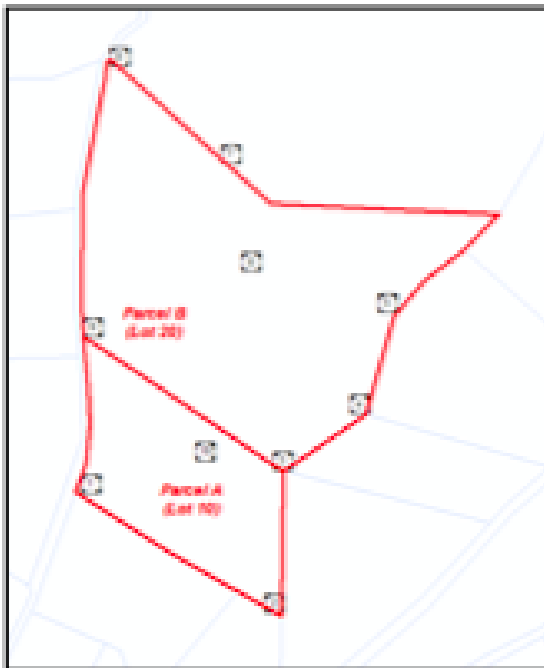
Estes Valley Land Trust
1191 Woodstock #5
PO Box 663
Estes Park, CO 80517

970-577-6837
evlt@evlandtrust.org

EVLT Photographic Documentation Guide for Monitoring Site Visits

Baseline Photo Documentation

Current standards for each easement's original baseline documentation require a comprehensive photographic inventory of the easement, and a map of photo-points to show where each photo was taken. The photographs should provide a comprehensive record of the conditions of the property, both along the perimeter and at key interior points on the property.



Each photo is assigned an identification number which reflects the location of the photo and the direction faced as the photo was taken, based on the photo-point map. For example, photos from the property shown on the left might be given id numbers such as 5NE, 5SW, 10N. If it is helpful, additional identifying comments are also added to each photo.

The map itself can be based on GPS records, but a simple hand-drawn map of the photo-points will also work.

For many EVLT properties the baseline was completed before these standards were implemented. The EVLT is completing "baseline upgrades" for these properties over the coming years in conjunction with the monitoring activities.

Monitoring Visit Photo Documentation

Photographic records of monitoring site visits should be completed at the following times:

1. Every three years, complete a comprehensive photographic review of all of the designated photo-points for the easement. Photograph the same points and directions as was done for the baseline.
2. Every time there is an ownership change, complete a comprehensive review as in #1 above.
3. Every monitoring site visit, photograph and document any changes in the property.

Photographic standards

Monitoring photos may be taken using film or digital formats. Regardless, please take all photos using a horizontal aspect. Even though vertical pictures can be more artistically pleasing, they are harder to include in the documentation!

FILM: If you are using film, please submit to the EVLT office the negatives as well as prints from the photos.

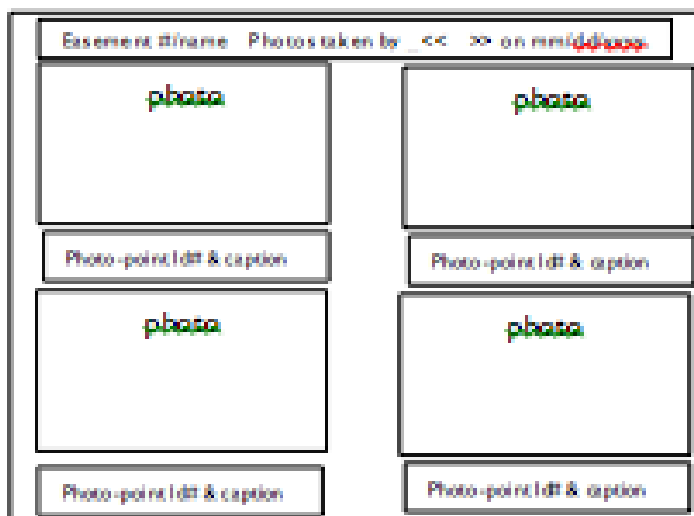
DIGITAL: If you are using digital format, please submit the original, unmodified images. Monitoring photographs are original records of conditions in the field and may be used as evidence in court. The only features of an image which may be modified are very small changes to the framing, (no more than 15% of the total width and/or height of the image may be cropped off), and compression or reduction in file size for ease of upload. *No other modifications may be made.* In the event that a feature requires focus or emphasis, submit both the original image, and then a second version clearly labeled as "modified for emphasis" to which changes may be made as needed for interpretive purposes.

Keep all file sizes small enough to stored and transmitted efficiently, while still retaining enough information content to be enlarged if necessary. We recommend using [jogs](#) for the information content that can be retained by compression.

What/how to submit photos to the EVLT office

At a minimum, please submit the photos, identified by photo-points, along with brief descriptions when necessary. These descriptions can be on a separate sheet of paper.

By the time photos get to the documentation binders, they have been arranged into a layout as shown on the right. The closer you can get to having your photos submitted in this form, the easier it is for the office to process them. This layout can be accomplished manually, or in [Powerpoint](#) or some other software. You can submit the printed versions, or just submit the digital files and we will print them out. However, don't worry if this is outside of your expertise...just [submit](#) the components (the pictures & the photo-point id/caption information) and we will work with them to develop the final product.



Digital photo records can be submitted in a number of ways:

1. [bring](#) the camera (and its connection cable) to the office, and we will download directly from the camera. The EVLT office has a digital camera that can be checked out for monitoring.
2. [bring](#) or send it in on cd's, [dvd's](#), or flash drives. The EVLT office has several flash drives that can be checked out for this purpose.
3. Probably your submission will be too big for email, but it might work for you to use www.sendthisfile.com which is a service for transmitting large files that is free on a limited basis. Check it out!

(The EVLT office will mail the following handout to landowners at request of the Monitor)

Bark Beetle on EVLT Conservation Easements

Bark beetles, particularly Mountain Pine Beetle (*Dendroctonus ponderosae*) and Ips (known as “engraver” beetle), are native to the Rocky Mountains of Colorado. Unfortunately, their populations are at high levels and are impacting trees on EVLT conservation easements (CE’s). The beetles may affect both lodgepole and ponderosa pine, causing the trees to turn brown, lose needles, and thus change the visual and ecological characteristics of the CE.

On the one hand, beetles play an essential ecological role in forest ecosystems, support numerous other species, and renew old, unhealthy and overstocked stands of pine trees. On the other hand, they kill thousands of pine trees, create a temporary fire hazard, produce hazard trees, decrease property values, and for most people decrease the visual appeal of the landscape.

There is extensive reference material on mountain pine beetle and ips beetle biology and management available from the Colorado State Forest Service and the Larimer County Department of Natural Resources. (See: <http://csfs.colostate.edu/pages/mountain-pine-beetle.html>) Recommendations and requirements for the management of bark beetles from various entities include the use of an Integrated Pest Management (IPM) approach. An integrated pest management strategy includes destroying brood trees, maintaining healthy forest conditions (e.g. thinning), and in some cases spraying trees.

The town of Estes Park, recognizing the impact of mountain pine beetle and other forest insects on the community, legally requires via Ordinance 08-08 for the inspection of property and the removal of infected or so called “brood” trees. For lands outside incorporated Estes Park there are similar requirements. The bark beetle has been identified as a pest requiring control under Colorado State Statute C.R.S. 35-4, the “Pest Control Act”. The Larimer County Forester can enforce this state statute, although the focus and preference is education and encouragement of beetle control and land stewardship.

In summary, implementation of C.R.S. 35-4, Estes Park Ordinance 08-08, and an integrated approach to the management of bark beetles are consistent with the trust responsibilities for CE’s of EVLT. That is, the thinning of trees to improve forest health, the preventative spraying of a small number of high-value trees or the use of pheromone “pouches”, and the removal and proper disposal of infected trees are all appropriate on EVLT conservation easements.

For technical information on bark beetles contact:

Colorado State Forest Service Fort Collins District: (970) 491-8660	Larimer County Forester Dave Lentz: (970) 498-5765 dlentz@larimer.org
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2013 EASEMENT MONITORING REPORT

1. Easement Name:

Easement Number:

2. Location:

3. Owner data:

Current Owner and address	updates
Name:	Name:
Addr:	Addr:
Phone:	Phone:
email:	email:

Is this the owner who originally granted the easement?

Has property transferred since the last report? yes no don't know

If yes, explain:

Is property currently (or soon will be) for sale? yes no don't know

Is a property transfer expected in the next year for any reason? yes no don't know

If yes, explain:

Local contact for owner:	updates
Name:	Name:
Address:	Address:
Phone:	Phone:

4. Inspection data:

Name of EVLT Monitor:

Name of EVLT Monitor Partner:

Date of last inspection:

Date(s) of this inspection:

Was Owner/representative contacted before visit? yes no

Did Owner/representative accompany monitor on site visit? yes no

Names of others attending inspection of property:

6. Check for the following common issues. If "Yes" identify location on page 2 map and provide details below.

	Yes	None Observed	Landowner Reported
Littering, dumping, trash build-up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Build-up of construction materials, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unexpected buildings, fences or structures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Possible encroachment, boundary issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Excessive noxious weeds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Soil erosion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overgrazing by livestock/domestic animals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Off-road use (<i>motorized recreation</i>)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trespass, unauthorized hunting or hiking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vandalism (<i>e.g., graffiti, gunshot holes, defaced signs</i>)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Utilities maintenance, right-of-way changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stream/wetlands alteration, bank erosion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (<i>specify</i>)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Details (take photos if possible):

7. Current property conditions and uses (and are they consistent with easement terms?):

8. Observed alterations in the condition and use of the property since the last inspection:

Human-made (*e.g. building, road construction, trails, fences, excavations, fire mitigation, tree removal*)

Describe:

Natural (*e.g. fire, flood, drought, beetle-kill, landslide, windstorm, drought*)

Describe:

9. Observed conditions on adjoining properties which could affect the easement property:

CONSERVATION VALUES

10. Are there any concerns, on- or off-site, which might threaten the conservation values of the property? Yes Maybe None observed

If "Yes" or "Maybe" describe:

PROHIBITED USES AND RESERVED RIGHTS *(See Deed of Conservation Easement)*

11. **Are there any concerns related to activities that are prohibited?**
 Yes Maybe None observed
- Are there any concerns related to landowner's reserved rights?**
 Yes Maybe None observed
- Are there any changes in the exercise of landowner's reserved rights?**
 Yes Maybe None observed
- If "Yes" or "Maybe" to any of the above, describe details:

12. **Inspector's other observations or comments:**

13. **Identify any recommended follow-up activities to this site visit:**

14. **How many total volunteer hours were spent on this site visit (scheduling, traveling, inspecting, reporting by all volunteers):**

15. **Inspector attestation:**

Signature: _____ Date: _____

Address:	updates
Phone:	Phone:
Email:	Email:

Submit completed form to:
 Estes Valley Land Trust, 1191 Woodstock Dr. Suite 5, PO Box 663, Estes Park, CO 80517
 970-577-6837 evlt@evlandtrust.org
 Report suspected violations immediately.

Thank you for your dedication to Land Conservation!

<u>FOR OFFICE USE ONLY</u>	
Form received on date:	date:
Form reviewed by (name):	date:
Follow-ups required? <input type="checkbox"/> yes <input type="checkbox"/> no	
If yes, specify actions to be taken:	

June 20, 2012

Leo Weber and Deborah Hughes
2045 Devils Gulch Rd
PO Box 2381
Estes Park, CO 80517

Dear Leo and Debby:

Summer has arrived! The wildflowers are blooming in the Estes Valley, and we are beginning another monitoring season. As you might recall, the 2011 annual monitoring of your "Hughes" conservation easement was completed by Kim Barrier on Thursday, September 29, 2011. For 2012, we expect that Kim will continue as the lead monitor for your easement, and that monitoring will take place sometime between August 29 and October 1, 2012. If you have any special scheduling issues this year, feel free to contact the EVLT office and we will forward the information on to Kim. Within the next few weeks, Kim will contact you to schedule an appointment for a site visit to your property.

Once again, we extend our thanks to you for your continuing stewardship of your land. Your partnership is essential for a successful program of open space preservation. EVLT is now responsible for the monitoring oversight of over 9,500 acres per year. The only way this task is possible is because we have a great corps of volunteer monitors, and because we have a group of landowners who are dependable stewards. We are grateful for these gifts.

Please remember to read your conservation easement deed annually to refresh yourself of its terms. If you have questions regarding the interpretation of the terms of your easement, or if you anticipate a change of ownership of your property, please contact the EVLT office at the information listed above.

Best regards,



Mary Banken
Director of Operations

cc: EVLT file # 039
Kim Barrier

Event log section of Easement Database record.

ID	EasementNumber	Easement Name	Acreage	AmendDate	AmendRecorded	AmendReception#	AmendDateApproved
111	103	Ravencrest Chalet	20.58				

Grantor	Date	Recorded	Receipt#	DateApproved
Ravencrest Chalet	6/8/2004	6/9/2004	2004-0055626	7/17/2004

Location	Ttl
509 Pole Hill Road	SN72W

City or Near Development	Town	Estes Park	CO	Larimer

Notes																														
<table border="1"> <thead> <tr> <th>Easem</th> <th>EasementNum</th> <th>Eas</th> <th>OrigGrant</th> <th>CurrentID</th> <th>CurrentCo</th> <th>SendR</th> <th>OwnerSt</th> <th>OwnerEm</th> <th>TransactionNotes</th> <th>On</th> <th>OwnerName</th> <th>OwnerLastName</th> <th>OwnerAddress1</th> <th>OwnerAddress2</th> </tr> </thead> <tbody> <tr> <td>111</td> <td>103</td> <td>091</td> <td>✓</td> <td>✓</td> <td></td> <td>✓</td> <td></td> <td></td> <td>111 091</td> <td></td> <td>Ravencrest Chalet, c/o Eric Snyder, Bus. Mgr</td> <td>Snyder</td> <td>509 Pole Hill Rd</td> <td>PO Box 2620</td> </tr> </tbody> </table>	Easem	EasementNum	Eas	OrigGrant	CurrentID	CurrentCo	SendR	OwnerSt	OwnerEm	TransactionNotes	On	OwnerName	OwnerLastName	OwnerAddress1	OwnerAddress2	111	103	091	✓	✓		✓			111 091		Ravencrest Chalet, c/o Eric Snyder, Bus. Mgr	Snyder	509 Pole Hill Rd	PO Box 2620
Easem	EasementNum	Eas	OrigGrant	CurrentID	CurrentCo	SendR	OwnerSt	OwnerEm	TransactionNotes	On	OwnerName	OwnerLastName	OwnerAddress1	OwnerAddress2																
111	103	091	✓	✓		✓			111 091		Ravencrest Chalet, c/o Eric Snyder, Bus. Mgr	Snyder	509 Pole Hill Rd	PO Box 2620																

ID	East	EasementName	Revis	Mon	Monitor	M	MonitorPartner	Status	Mailout	PO or e	Receipt	Returne	Inspecti	ReportDt	OwnerLe	Tasi	Owner	Viola	Issues	
2376	103	Ravencrest Chalet	2013	016	Renate Fernandez	104	Curt Gleaves	Done	6/21/2012	2				9/24/2012	9/10/2012	9/22/2012		0		
2173	103	Ravencrest Chalet	2012	156	Amy Schwarzbach			BU report pending	6/21/2012	2										
2071	103	Ravencrest Chalet	2012	016	Renate Fernandez	104	Curt Gleaves	Done	6/21/2012	2				9/24/2012	9/10/2012	9/22/2012		10		
1887	103	Ravencrest Chalet	2011	016	Renate Fernandez	114	Mary Banken	Done	10/7/2010					10/6/2011	10/20/2011					
1750	103	Ravencrest Chalet	2010	016	Renate Fernandez	114	Mary Banken	Done	10/6/2010					10/6/2010	10/6/2010	10/29/2010		4	Urquhart partner for 2011	
1547	103	Ravencrest Chalet	2009	016	Renate Fernandez			Done	9/30/2009	email				9/30/2009	9/24/2009	9/30/2009	2/24/2010			
1098	103	Ravencrest Chalet	2008	016	Renate Fernandez			Done	7/8/2008	mail				10/23/2008	10/6/2008	10/6/2008	8/24/2009		major	reclamation accepted 8/24/09
258	103	Ravencrest Chalet	2007	016	Renate Fernandez			Done	7/12/2007	email	9/10/2007			10/1/2007	9/28/2007	9/28/2007	10/17/2007			
111	103	Ravencrest Chalet	2006	016	Renate Fernandez			Done						11/28/2006	11/28/2006	6/18/2007				
541	103	Ravencrest Chalet	2005	016	Renate Fernandez			Done						10/13/2005	10/14/2005	3/3/2006				
665	103	Ravencrest Chalet	2004	036	Bill Pinkham			Baseline						9/27/2004	10/13/2004	10/21/2004		0		

7. Land Trust for Tennessee (LTT)

Stewardship Site Visit Monitoring Form

Property Owner and Property Name:	
Property Address and County:	
Tax Map and Acres:	
Date of Visit and Weather:	
Date of Previous Visit:	
Monitor(s):	
Method of monitoring (for example, by car)	

Owner contacted prior to visit? Yes No

Has owner been responsive within the last two years? Yes No

Ownership Status

Has the property changed hands since the last monitoring visit? Yes No
if yes, to whom has the deed been transferred? (name/address/phone number):

--

if no, does the land owner have any plans to transfer or sell the land in the immediate future? Yes No details?

--

The Land Trust for Tennessee
209 10th Ave South, Suite 511 · Nashville, Tennessee 37203
www.landtrusttn.org

Stewardship Site Visit Monitoring Form

Landowner Concerns, Reserved Right Requests and Areas for Improvement/ Stewardship

Does the landowner plan on executing a reserved right? Does the landowner have any questions, concerns or Stewardship needs? (such as stream improvement, cost-share programs, general farm clean-up, tree planting, etc.) Please list the questions and responses given by monitor below. The office will follow up on any questions the monitor could not answer.

Present Land Use: How is the protected land currently being used by the landowner?

Agricultural Use: Forestry Use: Other Uses:

Have any human alterations occurred to the property since it was last monitored? (e.g. building/road construction, trails, fences, timber harvesting, excavation) Yes No . If **Yes**, describe activity & indicate its location on the monitoring map. **Photograph all alterations.**

Have any alterations occurred to property by natural causes (e.g. flood, fire, windstorm, erosion). If yes, describe nature of changes & location. Photograph changes. Yes No

Areas Visited

Please describe the areas visited during the monitoring visit (e.g. drove just the roads, hiked through the fields etc.) Please note any new pictures taken of the property then saved into the project folder.

Review Aerial Photograph and photograph any alterations.

Aerial photo observed

Notes:

Stewardship Site Visit Monitoring Form

Easement Compliance

Potential problems or specific areas to visit on future inspections.

- Building(s):
- Encroachment Issues:
- Vegetation areas:
- Erosion issues:
- Farmstead Areas/Building Envelopes:
- Neighboring Land:
- Other areas of concern:

Please provide a list of follow-up items for the Stewardship Director:

TextField19

Monitor's Signature

Date

Accompanied by:

Volunteer hours, if applicable:



Confidentiality Agreement

THIS AGREEMENT is made this ____ day of _____ 2013, by and between The Land Trust for Tennessee, and _____; each hereinafter referred to individually as "Party" and collectively as the "Parties".

WHEREAS, the undersigned agree that they may be in receipt of certain confidential Information pertaining to any and all aspects of the Parties' business operations and finances; and

WHEREAS, both Parties agree that the dissemination of such Information to any other Person or the use by either Party of such Information in competition with each other will cause significant harm to either Party;

NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

1. "Information" as used herein means all information, written or oral, furnished between and among the Parties (whether such information is prepared by or obtained from the Parties, their clients, partners, advisors or otherwise), together with business plans, financial statements, analyses, compilations, studies or other documents prepared by the Parties, their clients, partners, agents, employees or representatives (including without limitation attorneys, accountants, analysts and financial advisors) which contain or otherwise reflect such information.
2. The term "Information" does not include any Information which (i) at the time of disclosure or thereafter is generally available to and known by the public (other than as a result of a disclosure directly or indirectly by the Parties or their representatives), or (ii) is or becomes known to one of the Parties on a non-confidential basis from a source other than the other Party or its advisors, provided that such source is not and was not either bound by a confidentiality agreement with either of the Parties or otherwise prohibited from transmitting such Information to a Party by a contractual, legal or fiduciary obligation.
3. The term "Person" as used in this Agreement shall be interpreted broadly to include, without limitation, the media, any corporation, company, group, partnership, joint venture, trust, estate, organization, association, syndicate or individual.
4. Both Parties covenant and agree that neither Party nor any of its employees, representatives or agents shall, at any time during or following the term of this Agreement, directly or indirectly, divulge or disclose, for any purpose whatsoever, any of such confidential Information which has been obtained by or disclosed to it as a result of its discussions with the other Party, except that either Party may disclose the Information or portions thereof to those of its partners, directors, officers, employees, agents and

representatives who need to know such Information for the purpose of performing duties within the normal scope of their employment (it being understood that those partners, directors, officers, employees, agents and representatives will be informed of the confidential nature of the Information and will agree to be bound by this Agreement and not to disclose the information to any other Person).

5. Both Parties agree that any and all Information furnished between and among the Parties will not be reproduced or disclosed to any Person not a representative, agent or employee of the entities signing this Agreement without the expressed written approval of the signers below.

IN WITNESS WHEREOF, the undersigned Parties have hereby executed this Agreement through their duly authorized representatives as of the day and year first above written.

Signature: _____

Name: _____

Title: _____

Organization: The Land Trust for Tennessee, Inc.

Signature: _____

Name: _____

Title: _____

APPENDIX D: VOLUNTEER MONITOR APPLICATION

Contact Information:

Name:	
Address:	
City: Zip:	
Phone #: (h)	(cell)
E-mail:	
Preferred contact:	

Experience:

You do not have to have any experience in conservation to be a volunteer monitor for the Land Trust for Tennessee. However, we would like to know about any special skills you may bring to the position. Please indicate if you have any experience with the following activities:

_____ photography _____ species identification _____ working with maps, compass, GPS
_____ natural resource management

Please describe your level of hiking experience:

Please tell us a little about your experience and or interest in becoming a volunteer monitor:

Availability:

When: When would you be available to volunteer with the Land Trust?

_____ Sun _____ Mon _____ Tues _____ Wed _____ Thurs _____ Fri _____ Sat

Hours/Time Preference:

Where: Please indicate any areas or types of properties in which you would be interested in monitoring protected properties (e.g. location; habitat type):

What Type: We have many types of properties that vary in the length of time and difficulty in monitoring. What type of properties would you be interested in monitoring?

Distance: <10 miles <50 miles >100miles

Terrain: On Trails/farm roads Off Trails

Elevation: Relatively flat Moderate hills Uphill steep

Emergency contact information:

Emergency contact name:

Relationship:

Day phone: Evening phone:

Please consider health issues we should know in case of emergency. These are important for the Land Trust to ensuring your safety while out in the field, in addition to matching you with protected properties to hike – let us know about allergies, medications, and recent or recovering injuries, for example.

Other comments or information we should know about:

Signature: _____ Date: _____

RELEASE AND WAIVER OF LIABILITY

This Release and Waiver of Liability executed on the date set forth below by the undersigned ("Volunteer") in favor of THE LAND TRUST FOR TENNESSEE, INC., a Tennessee not-for-profit corporation ("LTTN") and the owners of real property on which LTTN is the holder of a conservation easement (each, an "Owner").

From time to time, Volunteer will visit one or more properties on which LTTN holds a conservation easement (each, a "Site"), and Volunteer agrees to waive any and all rights, claims, disputes, and/or defenses Volunteer may have in connection with visiting or traveling to or from each Site in consideration for the Owner of the Site granting permission to enter the Site.

Volunteer hereby freely, voluntarily, and without duress executes this Release under the terms set forth below:

1. Volunteer does hereby, for Volunteer and Volunteer's heirs, executors, and administrators, knowingly release and forever discharge and hold harmless each Owner and LTTN, their successors and assigns and their officers, directors, employees, agents, and shareholders from any and all liability, claims, demands of whatever kind of nature, either in law or equity, which arise or may hereafter arise from Volunteer's visit to or presence upon each Site.
2. Volunteer acknowledges and agrees that the Owner's permission for Volunteer to walk through each Site is limited to Volunteer only and subject to being in the presence of and under the direction of a representative of such Owner.
3. Volunteer understands that hazardous conditions may exist on a Site. Volunteer expressly and knowingly assumes the risk of injury or harm resulting from Volunteer's presence on a Site and releases each Owner and LTTN from all liability for injury, illness, death or property damage resulting from the visit.
4. Volunteer shall indemnify and hold harmless, each Owner and LTTN and their respective successors and assigns, and their officers, directors, employees, agents, and shareholders against any and all charges, complaints, actions, suits, proceedings, hearings, investigations, claims, demands, judgments, or decrees, stipulations, injunctions, damages, penalties, liabilities, obligations, fees which may arise from the access to a Site.
5. Volunteer expressly agrees that this Release is intended to be as broad and inclusive as permitted by the laws of the State of Tennessee, and that this Release shall be governed by and interpreted in accordance with the laws of the State of Tennessee. Volunteer agrees that in the event that any clause or provision of this Release shall be held to be invalid by any court of competent jurisdiction, the invalidity of such clause or provision shall not otherwise affect the remaining provisions of this Release which shall continue to be enforceable.

Executed this ____ day of _____, 2013.

By: _____

Print Name: _____

Title: _____

Company: _____

Company Address: _____

Phone Number: _____

Email: _____

Would you like to receive the Land Trust for Tennessee's e-newsletter? We'd love to send them to you!
____ Yes, I would like to receive the LTTN e-newsletter. ____ No, thank you.



The Land Trust for Tennessee- Monitoring Fact Sheet

Monitoring is the regular inspection of property protected with a conservation easement. It is the core component of The Land Trust for Tennessee’s conservation easement stewardship program. It helps the Land Trust build relationships with landowners, allows the Land Trust to discover any problems on the land, provides an opportunity to document any changes in the property or its ownership, and is critical for the Land Trust to meet its legal obligations.

Monitoring Visits

It is the policy of The Land Trust for TN to monitor each property protected by a conservation easement at least once a year—and more frequently if necessary. It is our goal to prevent easement violations; frequent contact with the land and the landowner helps us achieve that goal.

The monitoring season typically runs from January through March. Winter is a popular time to monitor as sparse vegetation can make it easier to view the property. Any visit to a property outside of the regular season should be documented as a monitoring visit.

Monitoring is most frequently done on the ground with a Land Trust staff or volunteer monitor walking the protected property. However, in some cases monitors review property by car, by boat or by an aerial flyover. Each conservation easement and each parcel of land is unique so each requires its own monitoring approach.

Working with Landowners

Each year, the Land Trust assigns a monitor to visit every property protected by a Land Trust conservation easement. The assigned monitor will then contact the landowner to arrange a time to visit the property.

The Land Trust welcomes and encourages landowners to accompany the monitor during the monitoring visit. Walking the land together can be important for a number of reasons, including:

- Landowners have a more intimate connection to their property than does the Land Trust and their knowledge can make the visit more effective and efficient.
- There is an opportunity for a landowner to raise any questions about the easement or to discuss any future plans or goals for the property, which can help prevent unintended violations.

A landowner may also ask someone else—perhaps a family member or neighbor—to accompany the monitor.

Protected Property

Conservation easements may be perpetual but memories fade and property conditions change over time. The Land Trust asks each monitor to complete a report following each monitoring visit. These reports are kept in the Land Trust's database and office and provide an important record of the property's condition and its use so that those who come later understand the history of a protected property.

Preventing Problems vs. Discovering Violations

The essence of any conservation easement monitoring program is to make sure that landowners are complying with the terms of their easement. Through periodic monitoring, the Land Trust can often detect potential problems early—before they become serious violations. However, we also encourage all landowners to contact the Land Trust whenever they have a concern or question about their easement rather than waiting for the annual monitoring visit. No matter how thoughtfully drafted, conservation easements can be confusing. Seeking an interpretation early can avoid problems later.

In the end, The Land Trust for TN must be prepared to correct any violations of its easements. This is the commitment we make to all landowners who entrust us with the responsibility to protect their land. If a violation is discovered, we will work with the landowner whenever possible to have the situation corrected without further action. Legal enforcement is a remedy of last resort.

Volunteers

Volunteers play a critical role in The Land Trust for TN's monitoring program. They are able to extend the Land Trust's presence into local communities throughout the state and personally work with landowners when staff might not otherwise be able to do so.

All volunteer monitors are required to complete a training and certification program so that they can be skilled and informed representatives for The Land Trust for TN. The Land Trust holds training sessions for new and returning volunteers at least annually in one or more locations across the state.

I. INSTRUCTIONS FOR CONSERVATION EASEMENT MONITORING

Why do we monitor?

Conservation easements, as well as the associated baseline documentation of a property, are meant to provide documentation a property's conservation values in perpetuity. IRS regulations specify that to be an eligible conservation easement donee, an organization must have a commitment to protecting the conservation purposes of an easement donation (see Treas. Reg. 1.170-A-14(c)(1)).

Monitoring is the regular inspection and documentation of the condition of a property protected with a conservation easement. It is usually completed in person by walking the protected property in some cases monitoring can be accomplished through viewing the property by car, by boat, or by aerial flyover. However, only personal visits meet some of the purposes outlined below. Monitoring visits are documented in writing and with appropriate photographs.

The purpose of monitoring is to document the condition of and the human and natural changes on a property over time so that the Land Trust can ensure that the conservation easement is being upheld. Equally important, regular monitoring helps to maintain a continuous relationship with the landowner(s).

The 6 keys to preserving the conservation values of an easement and preventing violations are:

- 1) An easement document with clear and enforceable restrictions.
- 2) A commitment to enforce an easement, through legal action if necessary.
- 3) Strong financial planning to ensure adequate stewardship funding.
- 4) **A program of regular, systematic, and well-documented monitoring.**
- 5) **Good record-keeping.**
- 6) **A positive relationship with the property owner and the community.**

Numbers 4, 5, and 6 are where monitors play the most critical role. Monitors' "eyes and ears" in the field help us maintain landowner relations, catch an easement violation *before* it becomes so deeply entrenched that only legal action will resolve the situation, and accurately document land use changes in case we do have to resort to legal action.

With these 6 conservation easement stewardship keys in place, the likelihood that we will have to resort to mediation or litigation is greatly diminished. Unfortunately, violations are inevitable. When an easement dispute does arise, well-documented records can provide critical evidence. Furthermore, regular monitoring demonstrates a commitment to protecting our conservation easements to landowners, the community, and the court. Monitoring is conducted on a regular basis, usually annually, or more frequently if needed. The monitoring

season begins in January and runs through March but properties are monitored throughout the year.

Once you are assigned a property to monitor, you will retrieve the conservation easement, baseline documentation report and associated maps from the Land Trust's database called Conservation Track. As of summer 2013, Conservation Track is in process of being fully implemented with an expected completion of fall 2013. You will receive an email regarding Conservation Track once it is ready for your use.

Conservation Track will provide a simple online fill-in monitoring form that will be directly uploaded to our files. It will also house an area for photographs and any identifying information about each photograph. Each unique user of Conservation Track will be assigned a login and the database can be accessed remotely from any location. Stewardship staff will notify you of any updates regarding the completion of Conservation Track.

Remember that each monitoring inspection is **private and confidential**. The information collected regarding the visit is not to be shared with others.

While a monitoring inspection is interesting and enjoyable, it is work that you are performing for the Land Trust. This is not the time to invite friends or family for a hike on private lands. It is not the time to invite a nearby neighbor to visit a property s/he has wanted to see. It is not the time to build clientele for any personal business. **Without the landowner's expressed permission, no one other than staff, Board or fellow monitoring volunteers should accompany you on an annual inspection.** The landowner has given a conservation easement to the Land Trust with the written understanding that the property continues to be private. Your inspection is an important part of a legal process that is in place to ensure that the property remains consistent with the details of the easement the owner has signed.

Before the Inspection

- (1) In the first quarter of each year, the Land Trust office contacts the landowner updating him/her on the Land Trust's accomplishments, the reasons for the monitoring inspection visit, and alerting the landowner that a volunteer monitor will be contacting them to arrange an inspection in the upcoming monitoring year.
- (2) The lead monitor for each inspection signs into Conservation Track for their specific property. The database includes the following:
 - General landowner contact information
 - Recorded conservation easement
 - Baseline documentation report with maps and driving directions
 - Previous monitoring reports
 - Reserved right requests
 - Current year fill-in monitoring report

- (3) The lead monitor **contacts the landowner(s) and arranges the inspection date. Invite the landowner or assigned representative to accompany you**, and make every effort to schedule the visit when the landowner or representative can attend. Not only is this a great way to establish a cooperative relationship with the landowner, but the landowner is often the one who knows the property best and can point out potential problem areas (e.g., boundaries). If this is a landowner's first experience with a monitoring inspection, take the time to explain the monitoring procedure and the role of the Land Trust in protecting the property's conservation values. Remember to record all communications with a property owner or representative in Conservation Track.
- Call the landowner the day before the scheduled field visit. If the landowner will be accompanying you, confirm the date, time, and exact meeting location. If the landowner will not be accompanying you, remind him/her that you will be on the property, what time, an estimate of how long you will be, and what you will be doing. In both cases, thank the landowner for their cooperation. It is acceptable to confirm via voicemail.
 - If you are unable to reach the landowner, plan to be on the property on the scheduled date, at the scheduled time, and in the agreed upon location. If the landowner is unavailable when you arrive, proceed with the monitoring—you have a legal right to be there.
- (4) The lead monitor **contacts Land Trust staff** and coordinates the inspection with them, including gathering of equipment, establishing an inspection route, assignment of roles (e.g., note-taking, photographing), etc.
- (5) **Review the conservation easement** reserved rights and restrictions, past monitoring reports, recent correspondences with the landowner, and other materials included in Conservation Track. Ask Land Trust staff if you have any questions.
- (6) **Set monitoring priorities** ahead of time (e.g., boundaries, existing access or utility easements, building sites, stream habitats, public access areas). Priorities should be adapted to the specific conservation values of the property. Take difficulty of terrain and distance into consideration when planning your route and length of time for your monitoring visit.

Preparing for the visit

- Monitor the weather forecast the night before your scheduled visit and reschedule if necessary. If you reschedule, please let the stewardship coordinator know.
- Email or leave a message with the stewardship coordinator immediately before you leave, confirm where you are going, and call the office again, once you have returned, to let us know you have returned safely.
- Know the hunting seasons for your area and take appropriate precautions such as wearing an orange vest or attaching a bell to your jacket or pack. Visit <http://www.state.tn.us/twra/huntmain.html> for information about hunting seasons.
- Dress appropriately and bring plenty of water.

- Remember to bring a camera (or your phone if it takes good pictures)

During the Inspection

1. Your route will depend on the property.
 - For smaller properties **walk the property boundary first, and then inspect the interior.**
 - Experienced easement holders report that most easement violations occur at the boundaries, e.g., by trespassing, and often without a property owner's awareness. Inspect as much of the interior as is practical.
 - Focus on areas specifically mentioned in the reserved rights and restrictions of the conservation easements, areas where new construction is occurring, and areas accessible to the public.
 - If property size, remoteness, or topography make it impractical to walk the entire property, vary your annual monitoring routes so that a different portion of the property each year is covered, and so that the entire property is seen on a rotation of every 2-3 years. Per Land Trust policy, all properties over 1,000 acres in size are monitored by aerial flyover every 3rd year. **Note which route you take in a given year in your annual monitoring report by drawing the route and arrows indicating which direction you traveled.**
- (2) **Document current conditions.** Compare current conditions with those documented in past monitoring reports and photos (if available). As thoroughly and objectively as possible, document all observed natural and human-caused changes on the property. Complete the monitoring report provided available electronically online from the Monitoring. If you suspect an easement violation, record this and any other concern, as well as speculations, on the bottom of the report. Use photographs and copies of property maps to document any major changes in property condition or land use.
- (3) **At the end of the visit,** before leaving the property, **draw your monitoring route on one of the monitoring maps.** Be sure to write down any notes during the visit that need to be conveyed to Land Trust staff.

Completing the Monitoring Report

- (1) **Completely fill out your monitoring reports within 2 weeks upon completion of your inspection.** The longer you wait, the more you might forget!
 - a. Each landowner's property interest in a conservation easement is separate and distinct from every other landowner's interest. **If a conservation easement is in three distinct parcel ownerships, three separate reports must be written, one for each owner.** Note: the reverse is *not* true. If a single entity owns multiple parcels covered by a single conservation easement, one report suffices for the multiple parcels.
 - b. Make notes of any changes that need to be changed in the files (new phone

numbers, change of owners etc.)

- (2) Remember to keep your observations on the monitoring report as objective and factual – but still thorough – as possible. If you have concerns but do not feel comfortable capturing them on the monitoring form, call the Stewardship Manager or Coordinator immediately to discuss.
- (3) **Remember to write down any identifying information for each picture you take. Examples of photograph documentation would be “Proposed bridge over stream”, “proposed barn expansion” or “natural alteration of property.”**
- (4) **Sign, and date, all documents with which you supplement the monitoring report.** In accordance with Tennessee law, The Land Trust allows electronic signatures as accepted forms of signature.
- (5) **Upload your completed report, and all accompanying documentation and digital photographs to Conservation Track as soon as possible.** Our timely response to potential violations depends upon the timely completion of your report.
- (6) The Stewardship Manager and Coordinator will review each monitoring inspection report. Those that report no easement violations or other concerns will be filed at the Land Trust office with a copy of the report sent to the landowner. Reports with expressed concerns or otherwise suspected easement violations will be further reviewed by the Stewardship Committee. A plan will then be decided upon for addressing these concerns and assessing whether or not a violation has occurred.

II. MONITORING: ISSUES AND VIOLATIONS

What constitutes a violation?

Technically, a violation is the use of the protected property contrary to the terms of the conservation easement. The Land Trust for Tennessee views all potential violations seriously and is prepared to enforce the terms of its easements.

It is sometimes difficult to determine if a violation has occurred. Situations can be ambiguous, and sometimes undesirable activities are not clearly addressed by the easement. The cause of the problem could be from a number of different possibilities. Sometimes issues arise from others using the property including employees, property managers, neighbors or what we refer to as “third parties.” **It is important for monitors – particularly volunteers – not to confront or accuse the landowner of any wrongdoing at the time of the visit.**

If you encounter a violation

(1) Listen to the landowner.

If the landowner is present, you may ask about the problem in a non-confrontational manner. For example you may ask about the "new building" down in the south forty or the "trees cut in the for-ever wild". Answers will vary. The landowner may identify the cause, offer an explanation or get defensive. Write down what was said as soon as practicable or immediately after the monitoring has been completed.

(2) Determine the cause, if possible.

Force of nature such as wind, erosion, fire or insects
Landowner, property manager or tenant
Third party violations such as neighbors.

• Determine the landowner's proposed course of action or repair, if possible.

A landowner may already be working to correct a situation. For example, the landowner may be planning to clean up from a windstorm, or is dealing with a neighbor's garbage etc. Report whatever the landowner might be considering in as much detail as possible.

(4) Document the damage.

Take as many photographs and try to quantify the issue as well as possible to identify the problem and mark locations of a map. If you are GPS savvy, establish a waypoint or obtain a location. If photos aren't possible, be sure to record detailed observations of the potential problems on the monitoring report form ASAP and inform Land Trust staff when you get back from your visit.

(5) Stay on good terms with the landowner.

It is very important for all monitors to stay objective and remain on good terms with the landowner at the time of the monitoring visit. Volunteers should not try to resolve the specific details of any issue or violation. Violations are often sensitive and complicated and will require additional consultation with staff. If at any time, the landowner appears uncomfortable or defensive, do not press the subject, just continue the monitoring visit or end the visit as appropriate.

It is NOT a volunteer's job to do any of the following:

- Interpret the terms of the conservation easement for the landowner. Direct any questions the landowner may have about the easement to the Land Trust staff.
- Approve or disapprove any future plans or reserved rights the landowner may wish to discuss.
- Accuse the landowner of violating the terms of the easement.
- Carry out any kind of mediation or enforcement action regarding a violation.

(6) Notify the Land Trust As Soon As Possible.

Report the issue or violation to Land Trust staff's Stewardship Manager or Land and Stewardship Coordinator as soon as possible. **Violations that are obvious (new**

IV. STAFF CONTACTS

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APPENDIX A: VOLUNTEER MONITOR CERTIFICATION PROGRAM

The Land Trust for Tennessee relies extensively on a network of volunteers to help monitor the numerous properties on which it holds conservation easements. Monitoring is one of the most important ways of maintaining positive landowner relationships and ensuring landowners continue to understand and comply with the terms of their easements.

In order to ensure that all volunteer monitors are adequately trained to complete this important task, the Land Trust requires Monitoring Certification Members to participate in a number of activities:

1. Complete an application.
2. Attend an initial orientation monitoring training session. One-on-one training with Land Trust staff may substitute for an orientation session.
3. Read through and understand training materials.
4. Agree and sign the Land Trust's Confidentiality Policy.
5. Agree and sign the Land Trust's Volunteer Liability Release Waiver.
6. Attend a field training session if not offered as part of the training session.
7. Monitor their first property with Land Trust staff or an experienced monitoring volunteer. .
8. Attend follow-up/refresher monitoring training sessions as scheduled.

Participation as a Volunteer Monitor requires several responsibilities:

1. Maintain landowner confidentiality.
2. Use your Land Trust association for authorized activities only.
3. Represent the Land Trust in a professional, non-political manner.
4. Commit to lead on monitoring at least one property a year.
5. Complete monitoring reports in a timely manner.
6. Mentor new monitor volunteers..

APPENDIX B: POSITION DESCRIPTION: VOLUNTEER MONITOR

Volunteer monitors serve as the “eyes and ears” for the Land Trust for Tennessee. As a volunteer field monitor, you will be part of a collaborative effort involving landowners, Land Trust staff and other volunteers.

Duties include monitoring the terms of conservation easements on privately owned protected properties throughout Tennessee. Volunteer monitors have several important responsibilities, including:

- Complete on-the-ground inspections of protected properties and document any changes on the landscape or alterations to man-made features with photos and written comments.
- Cultivate positive relationships with landowners and convey questions or concerns landowners may have about their easement to the Land Trust.
- Help to keep monitoring records and conservation easement files updated.
- Discuss your observations with Land Trust staff.
- Enjoy the outdoors and have Fun!

Volunteer monitors should meet the following qualifications:

- Participation in an orientation and field training.
- Willingness to monitor at least one protected property a year for at least two to three years. This is typically a one day commitment per property.
- Ability and willingness to travel to protected properties (must have a valid driver’s license if driving). Mileage reimbursement is provided by the Land Trust. In order to be reimbursed for mileage, volunteers must fill out the Mileage Reimbursement Form by the end of the current month.
- Physically able and willing to hike around and inspect properties, possibly through forest, brush, wetlands and other difficult terrain and environments.
- Familiarity with the Land Trust, its mission and purpose, and monitoring procedures.
- Able to maintain the confidentiality of landowners, private plans and intentions regarding their land.
- Represent the Land Trust’s neutral position on political issues.

- Personable and diplomatic – working well with a wide variety of people.
- Good communication skills.
- Detail oriented – good record keeping skills and able to complete a short written monitoring report.
- Reliable.
- Be at least 18 years old.

APPENDIX C: WORKING WITH THE LANDOWNER

Call the landowner the day before the scheduled field visit. If the landowner will be accompanying you, confirm the date, time, and exact meeting location. If the landowner will not be accompanying you, remind him/her that you will be on the property, what time, an estimate of how long you will be, and what you will be doing. In both cases, thank the landowner for their cooperation. It is acceptable to confirm via voicemail.

Meet the landowner at the designated location at the scheduled time.

- If you are unable to reach the landowner, plan to be on the property on the scheduled date, at the scheduled time, and in the agreed upon location. If the landowner is unavailable when you arrive, proceed with the monitoring—you have a legal right to be there.

Talk with the landowner. Strike up conversation with the landowner so that you may learn about future plans or current changes. Ask questions but also be respectful of a landowner's privacy and ownership goals. Many landowners are happy to describe how they use their land, who they rely upon for advice, and their future property plans. Others may feel harassed by too many questions. Use your best judgment to ask appropriate questions at appropriate times. Express curiosity and appreciation of landowner's situation whatever it may be.

- Make sure to get accurate, up-to-date contact information.
- Give a subsequent landowner—or any interested landowner who requests it—information about LTTN.
- Write down the landowners questions to pass along to LTTN staff.

Questions to Ask the Landowner

Use common sense! It is important to be sensitive—landownership involves many private decisions. Express curiosity and appreciation of landowners' situation, whatever it may be. The following are some appropriate questions you may want to ask:

- Have you been receiving correspondence from LTTN? Have you sold or transferred any of your land? If not, what is your correct address?
- What uses are you making of your land (timber, hay, firewood, etc.)?
- Have you recently changed the management or uses of your land?
- Would you like any additional information about land management?
- Are you planning any new construction or any significant changes to existing buildings?
- Have you seen any unusual or interesting wildlife?
- Have there been any natural disasters or changes to your conserved land due to flooding, draughts, winterkill, or wind-damage?
- Are there any recreational uses of your land by the public? Have there been any problems?
- Have your neighbors engaged, or stated in intention to engage, in activities that could potentially encroach upon your conserved land?
- Are you or are your neighbors interested in conserving any additional lands?
- Is there anything you'd like to know about LTTN or its programs?

Frequently asked questions from Landowners

Follows are some typical questions you may be asked and examples of appropriate responses. (Remember, if you do not feel comfortable answering a question please say that you will pass on the question to the Stewardship staff and they will be in touch with an answer.)

Q. Somebody from LTTN was here last year, why are you here again?

A. It is LTTN's legal and ethical responsibility to document the land every year. Without the documentation, LTTN runs the risk of losing IRS non-profit status and the landowner could be penalized if they received a tax-benefit as a result of their conservation easement donation. Regular visits to the land also provide LTTN an opportunity to connect with the landowners, answer their questions, and assure that the conservation values important to the community and the original landowner are protected.

Q. If LTTN is monitoring with volunteers, why was I asked to make a contribution to Stewardship?

A. The landowner's donation is not a true cost; therefore, we rely on the generosity of volunteers to assist us with our mission to protect land. There are a great number of costs associated with stewardship, beyond the physical act of inspecting the land. Staff spends time answering the landowner's questions about their easement, reviewing requests for changes to property, mitigating violations, educating subsequent owners of easement protected property, and following up on the monitoring reports. In addition, as the inventory of protected lands grows, there will likely not be adequate numbers of staff members to visit all the properties in one year.

Q. Do I have to get LTTN's permission to . . .?

A. Do not attempt to answer this question. Note the landowner's question on the monitoring form and explain that the information you have is a simple summary and does not enable you to make such determinations. Tell the landowner that you will pass their question on to the Stewardship Coordinator promptly.

Q. Why haven't I gotten a break on my property taxes?

A. This is a question for their tax counselor or financial advisor. Since everyone's situation is different we cannot give tax advice.

Q. Conserving my land was a significant contribution. Why is LTTN still asking me for money?

A. Conservation of land is an ongoing task. The donation LTTN requests with conservation easements does not cover the full costs of stewardship. In addition, LTTN continuously raises money to assist with the protection of new lands and to educate the public about conservation easements.

Q. Is _____ a violation of my easement?

A. Never discuss violations or possible violations with the landowner. You are there to simply document existing conditions and assist the landowner with their general questions regarding land issues, their easement, and LTTN. Give the landowner the name, phone number, and /or email of the Land Protection Director for their area. Also note their concern on the monitoring form. Explain that you have made a note of the issue and that the Stewardship Coordinator or Land Protection Director will call them.

APPENDIX D: VOLUNTEER MONITOR APPLICATION

Contact Information:

Name:	
Address:	
City: Zip:	
Phone #: (h)	(cell)
E-mail:	
Preferred contact:	

Experience:

You do not have to have any experience in conservation to be a volunteer monitor for the Land Trust for Tennessee. However, we would like to know about any special skills you may bring to the position. Please indicate if you have any experience with the following activities:

_____ photography _____ species identification _____ working with maps, compass, GPS
_____ natural resource management

Please describe your level of hiking experience:

Please tell us a little about your experience and or interest in becoming a volunteer monitor:

Availability:

When: When would you be available to volunteer with the Land Trust?

___ Sun ___ Mon ___ Tues ___ Wed ___ Thurs ___ Fri ___ Sat

Hours/Time Preference:

Where: Please indicate any areas or types of properties in which you would be interested in monitoring protected properties (e.g. location; habitat type):

What Type: We have many types of properties that vary in the length of time and difficulty in monitoring. What type of properties would you be interested in monitoring?

Distance: <10 miles <50 miles >100miles

Terrain: On Trails/farm roads Off Trails

Elevation: Relatively flat Moderate hills Uphill steep

Emergency contact information:

Emergency contact name:

Relationship:

Day phone: Evening phone:

Please consider health issues we should know in case of emergency. These are important for the Land Trust to ensuring your safety while out in the field, in addition to matching you with protected properties to hike – let us know about allergies, medications, and recent or recovering injuries, for example.

Other comments or information we should know about:

Signature: _____ **Date:** _____