



# **VOLUNTEER MONITORING HANDBOOK**

Updated 01.02.2025

# About Landmark Conservancy

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Landmark Conservancy is a private, non-profit, 501(c)(3) conservation organization with the mission to conserve Wisconsin's natural legacy for everyone, forever.

This is done by using legal tools to help landowners achieve their conservation goals, serving as an alternative to state and local governments for holding lands in trust, securing funds for conservation projects, and ensuring conservation easement landowners adhere to the easement terms.

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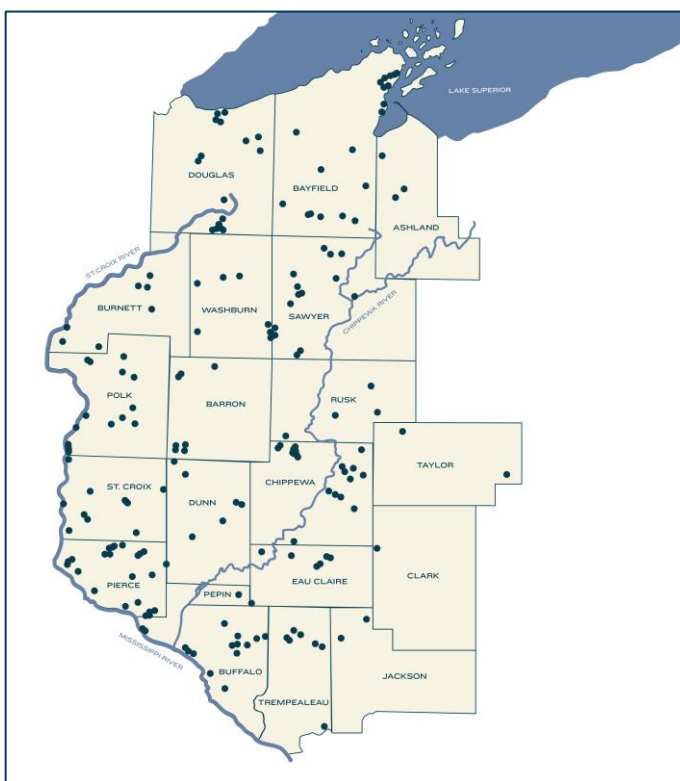
## Conservation Easements

A conservation easement is a legal document recorded in the County Register of Deeds which constrains the use of land to protect conservation features on the property.

These constraints may include limitations on subdivision, restrictions on development, protection of sensitive features and waterways, agricultural restrictions, etc. The land continues to be owned and managed by the landowner, but Landmark Conservancy will have an interest in defending those conservation values on the protected property.

We work with each landowner to establish land preservation agreements that hold property at its current or natural state in perpetuity to prevent development and fragmentation of lands.

Landmark Conservancy has permanently protected over 42,000 acres on over 250 properties in northwestern Wisconsin. The types of land Landmark Conservancy has worked to conserve include forests, prairies, farmland, wetlands, and shorelines.



*Conservation Easements held by Landmark Conservancy as of 2021*

# Monitoring Conservation Easements

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## Why Monitor?

Monitoring is the core component of any conservation easement stewardship program. Yearly monitoring:

- Ensures that the terms of the conservation easement are being upheld, and provides the opportunity to document land use changes
- Helps Landmark build a relationship with the landowner, and provides an opportunity to assist/educate them on ways to be better stewards of their land
- Meets Landmark's legal obligation to defend and enforce the terms of the conservation easement

*Volunteer monitors are instrumental in helping Landmark fulfill our yearly monitoring requirements – thank you!*



## Volunteer Monitor Expectations

### Volunteers are expected to:

- Review and sign the volunteer handbook
- Review and sign a volunteer waiver
- Commit to monitor their assigned properties and return the completed monitoring reports **by November 1**
  - If you become unable to monitor your assigned properties, please inform Landmark as soon as possible so that we are able to re-assign the properties
- Independently arrange a time to monitor each property
  - Landowner does not need to be present, but they do need to be informed of the visit ahead of time



## The Monitoring Process

### Prior to May 15:

**Property assignments** will be made by staff with consideration to the volunteer's availability and preferences

**Landmark Conservancy staff will contact the landowners** and share the volunteer's contact information with them.

**Staff will also ask the pre-monitoring questions and record them in the monitoring materials**

1. Have there been any changes on the property since the last monitoring visit?
2. Are there any land use changes planned?
3. Any questions or concerns about the property or the CE?
4. Are there any changes to contact information?

### **Before the Monitoring Visit:**

**Familiarize yourself with each property assigned to you.** Look through the monitoring folder and/or the Landscape database for information such as:

- Contact information for the landowner
- Monitoring plan
- Maps of the property
- Monitoring reports from the previous years
- Baseline documentation

**Contact the landowner.** Try to call them at least a week before you plan to visit.

- If the landowner wishes to be present during the visit, attempt to schedule the visit at a time that works for the landowner
- If unable to reach the landowner, contact Landmark's Conservation staff

### **The Monitoring Visit:**

It's important that the monitoring visit is a positive experience for both the landowner and the monitor. The monitor serves as the eyes and ears for the land trust in the field to document land use changes on the property and pass along questions from the landowner. At no point should the volunteer give the landowner permission to do anything or tell the landowner that they are violating the terms of the conservation easement. This is the role of Landmark staff who will review the conservation easement and any associated grant restrictions to formally address easement compliance issues.

#### **What to bring on the visit**

- Smartphone with the Landscape app (see other provided training materials), or monitoring folder, pen, and camera
- Bug spray, water, compass, hat, etc.

#### **Conducting the site visit**

**Note:** Some properties may only take 10 mins to monitor, others may take an hour, depending on its size and/or complexity

- If meeting with the landowner, invite questions and listen!
- Walk the property – a general meander is often enough to get a sense of current land use
  - Do what you feel comfortable doing
  - Prioritize areas where recent land use has occurred

- Check boundaries for encroachment if there is likely to be disturbances near the boundary
- Make a general inspection of the property's interior
- Photograph any significant changes on the property, or things which will help us interpret your monitoring report
- Feel free to make notes on any of the maps provided in the monitoring folder

### After the Monitoring Visit:

- **Complete the monitoring report** – it is critical to complete and submit the monitoring report **as soon as possible** after the visit is completed, and before **the November 1<sup>st</sup> deadline**. This allows staff to respond to any issues in a timely manner.
  - Monitoring report **must be filled in completely**. “N/A” or “no changes observed” is fine
  - Either fill out the paper copy provided in the monitoring folder or use Landscape on the website.

***Note:** We don't share monitoring reports with the landowner, so you can be candid!*

- **Submit photos:** If you didn't use the Landscape mobile app to take pictures, email them to Tommy Adams and include:
  - A description of the photo
  - Approximate location of the photo (include map if you are able)
- **Return the monitoring folder** to either Landmark office in Bayfield or Menomonie.

### Post-monitoring:

Landmark staff will review the monitoring report and follow up with the landowner to acknowledge the annual monitoring visit and to answer any questions or concerns they may have expressed during the visit.

***Enjoy monitoring, and thank you for your help!***

# Monitoring Conservation Easements with Landscape

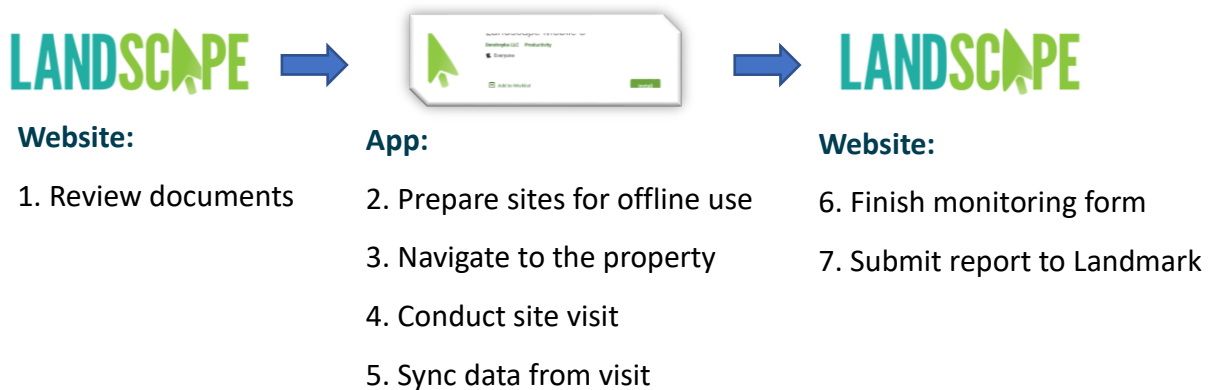
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## About Landscape

Landscape is a powerful program that makes monitoring and reporting easier and more accurate. It is available as both a website (<https://landconservationsoftware.com>) and as a phone application ("Landscape Mobile 3"), and both are used in conjunction with each other at different stages in the process.

The website is typically used to review documents ahead of the visit, although they are also available on the app. The phone app is used during the monitoring visit itself to map where the user is monitoring, and to map and store any photos taken. After the visit, the user must sync data from the phone to the website. Finally, the user will generate the final monitoring report on the website and route it to staff for approval.

### Typical workflow:



## The Monitoring Process

### 1) Review Documents

#### On the website

##### Logging on:

- You will receive an email from Landscape asking you to create an account
- Go to <https://landconservationsoftware.com>, select 'Start Landscape' in the top left of the screen, and log in

##### To view assigned sites and information:

- Click the "Incomplete Annual Monitoring Visit" for each site to access materials
- Read through the active monitoring form
  - Staff will have already contacted each landowner and made notes of any planned or past changes for the properties

- Click the book icon on the left to view documents (contact info, past reports, baseline document, etc.)
- Click the Photopoints on the map to view photos from past visits (if available)

## 2. Prepare Sites for Offline Use

### In the app

- Download the “Landscape Mobile 3” app onto your phone and log in
  - You may see a location services alert pop up. Select “allow”
- To increase accuracy, go to settings, then “logging level”, and select “detailed”

### Download sites

- Click in the search bar (“search stewardship sites”) and select “show team sites” filter the list to only your site assignments
- Select a site name, click in the site boundary on the map, and select “prepare offline” to download data before going into the field. Do this for each site.

## 3. Navigate to the Site

- Click the cloud icon to choose a downloaded property
- On the map, press and hold your finger on where you want to drive to
- Select “Yes” to confirm navigation through your default mapping app

## 4. Conduct the Site Visit

### Track recording

- Click on the cloud icon to choose a downloaded property
- Click in property boundary, then click “site visits” on the bottom bar
- Select the “in progress” Annual Monitoring visit and click ok
- Click “Start Visit” on the top right of screen, and hit “Yes” to update the time
- Your track will now be recorded (yellow “1” will now appear on Active Site Visit icon on main map view)

### Take photos

- Click on the camera icon, then press the white button to take a photo.
  - To save the photo, select keep
- Make sure to close the camera after each photo to return to the main map

### End Visit

- Click the Active Site Visit icon
- Click “Stop Visit” in the top right corner, and “yes” to update the end time
- Your track will stop recording

## 5. Sync Data

After you return home, sync data from your phone to the website

- Best if phone has a WiFi connection

- Open Landscape on your phone, click the spinning arrows icon, then “sync now”

## 6. Finish Monitoring Report

On website:

- Fill out the remaining questions on the monitoring form
  - We don’t share monitoring reports with the landowner so you can be honest and candid
- Click on Photopoints to add photo descriptions
  - **Note:** Be careful not to re-name the Photopoints – click on each photo individually to describe it

## 7. Submit report:

On website:

- In the Site Visit view, click the folder icon on the left
- Select “Annual Monitoring Visit” to generate the report
- Click in the signature box to sign
- Click “send for review” and select “Tommy Adams” to route for approval

**That’s it! Staff will review your report and follow up as needed.**

## App Screen Overview

