

## SECTION B: VOLUNTEERS

In the ideal world, all land trusts would have the funds to hire biologists and ecologists to undertake their inventories, prepare management plans and monitor their properties. However, in the not-for-profit, charitable world, we know this is often neither practical nor feasible. This is not to say, however, that professionals should not be involved. In some circumstances, it may be necessary to call in the experts. Nonetheless, volunteers can play a critical role in ensuring your properties are well managed without significant costs added.

It is important that land trusts and their volunteers are appropriately organized and skilled to undertake management of Ontario's significant conservation lands. The information contained in this manual is to assist land trusts and their volunteers in effectively managing the lands they protect. It will cover:

- Recruiting Volunteers
- Risk Management and Insurance
- Training Volunteers
- Preparing a Stewardship/Management Plan
- Monitoring Properties a Land Trust Owns
- Monitoring Properties with Conservation Easements
- Preparing a Baseline Report

Land trusts must regularly monitor their properties. Failure to do so may result in loss or damage to the property's conservation values. A land trust that does not care for its holdings takes the risk of losing credibility and in the case of easements, losing its right to protect the property's conservation values. This not only affects the values of the property and the land trust but also affects the land trust community as a whole.

Monitoring is done to measure changes on the land including: trespass or overuse, vandalism, hazards, wildlife and plant communities and enforcing the terms of a conservation easement agreement. In addition, it allows the land trust to ensure that the purpose, intent and objectives of a property management plan are met.

### Recruiting Volunteers

The first challenge your land trust should embark upon is recruiting volunteers to help manage your properties. Volunteers can be recruited in several ways. The first place to look is your membership. Chances are, members of your land trust are interested in nature and would welcome the opportunity to learn more about natural heritage and property management. A call for volunteers in your newsletter is a first step but can always be followed by personal letters or phone calls.

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The second place to look is to neighbours living next to the properties that you are protecting. They have a personal interest in ensuring that their neighbouring property is being monitored regularly and managed effectively.

A third place to look for recruits is other environmental groups such as nature clubs, fish and game clubs, etc.

Lastly, a more ambitious, but often valuable way of recruiting volunteers is through an ad in the local paper. A call for “nature enthusiasts” is a sure way to get a good response from your community. You will be surprised how many concerned and energetic individuals will respond to the ad. In this ad, you should address what the volunteers will be doing, how often, when and where. Emphasize that they will be trained.

### Pattern for Recruitment Ad

Ad (*Motivational appeal*) by (*task*) for (*persons or goal*) for (*time required*) in/at (*location*), training provided (*reward*). For more information, call (*contact name*) at (*organization*) at (*phone number*).

Motivational appeal: “You can help to preserve, protect and restore the beauty of the Greenhill Area for both humans and wildlife.”

Task: “You will become watchers of nature and learn to identify various plant and animal species.”

Reward: “Having fun, expanding your own skills and knowledge, acquire training and work experience.”

## Setting Up Your Teams

With your volunteer recruits ready and committed to helping your land trust, the next step is to organize them. This task can be assigned to a “Volunteer Coordinator” (paid or unpaid), staff person or a committee of the Board. The task is to assign the volunteers positions where they have interest and where they can best serve the land trust. Your volunteers may want to assist in “one-time” projects such as clean-up days and viewing platform erections, but may not be interested in committing themselves to longer-term projects such as monitoring properties. Your coordinator will use this information to match the individual’s needs to the appropriate project.



The type of volunteer needed to manage your properties should be interested in assuming an on-going role for the land trust. When we balance the skill sets of volunteers to the property requirements and choose a strong team leader, we have the basis of a productive volunteer unit. Ask your volunteers if there is a particular property they would like to monitor. Often their choice is based on the proximity of the property to their residence. This information will assist the “Volunteer Coordinator” in assigning volunteers to projects.

The Couchiching Conservancy, a land trust in Orillia, Ontario has been very successful in setting up a program for monitoring its properties. Using management teams known as Volunteer Property Management Teams (VPMTs) who are responsible for the Conservancy's property and conservation easement monitoring, Couchiching has engaged and retained many dedicated volunteers. The concept is for the team members to build a "personal attachment" to the property they are monitoring as if it were their own.



The information below outlines the process and requirements the Couchiching Conservancy uses when setting up and managing the Volunteer Property Management Teams.

### **Orientation Manual/Guidelines**

Provide volunteers, or at least the team leaders, with a set of guidelines or an orientation manual. These guidelines should include information on what volunteers are expected to do including monitoring procedures, record keeping, organization of public events and reporting to the Board. These guidelines should also identify the team leader and other members of the team and their contact information.

### **Suggestions for an Orientation Manual**

- The organization's mission statement
- Description of the organization's program
- Goals for the future
- Organizational chart with staff names, board member names and roles
- Purpose of the volunteer property management program
- Volunteer descriptions
- Volunteer policies
- Organization of volunteer program (training, evaluation, etc.)
- Hints about common problems
- The organization's expectations of volunteers
- Forms volunteers will use
- Compensation for mileage
- Support available to volunteers
- Volunteer responsibilities
- Training opportunities
- Contacts for staff, Board members and all volunteers

### **Orientation/Initial Site Meeting**

An orientation or initial meeting at the site with the team and one or two board members should be set up so that team members may become familiar with the property and receive any necessary clarification and training (*see below, The Training Session*) with regard to their responsibilities.

## **Letters of Authorization**

Assign approximately four to five people to a team. Volunteers should be appointed for one-year renewable terms. Provide volunteers with official letters of authorization from the Land Trust giving them permission to access the lands for monitoring purposes. Appoint a team leader for each team. A Board representative should also be appointed for each property. The leader is responsible for organizing the monitoring dates, holding the information collected and relaying any concerns or recommendations to the designated land trust Board representative. The Board representative will bring these items forward to the Board for discussion and rectification, if needed. Recommendations for action might include fixing a fence, addressing hazards such as old wells or dealing with neighbouring landowners. Moreover, the Board member is also responsible for ensuring that the teams are completing regular site visits. (*OLTA Volunteer Application Form, Appendix A*)

## **Risk Management & Insurance**

The Ontario Land Trust Alliance urges its members to bring their operations into substantial compliance with the OLTA Standards and Practices: including Standard 6.K. Risk Management and Insurance, which states; “The land trust protects its assets through a program of assessing and managing its risks and by carrying appropriate liability and property insurance”.

It is the responsibility of every land trust to know the content of their insurance coverage. The following information should only be used as a standard for developing your insurance coverage and risk management policies.

### **Liability Insurance**

Every land trust should maintain commercial general liability insurance coverage for all the land it holds in title, including those leased to or from other parties. For some properties, you may have custodianship or stewardship agreements with other conservation organizations. The stewardship or management agreement for the property should ideally stipulate that the stewarding organization: (i) indemnifies and saves the land trust harmless against all claims associated with the stewardship of the property; (ii) maintains liability insurance on the property; (iii) names the land trust as additional insured on that policy. This may be negotiable in some circumstances, but should be discussed with the appropriate committee, and resolution must be based on a mutual understanding of how to manage risks on the property.

Annually, this committee should review its insurance needs to ensure that coverage is adequate and appropriate. The particular requirements of the insurance agency may vary and the Stewardship Committee needs to ensure that its management procedures coincide with the insurance coverage. The information requirements may include the following:

- Buildings (if yes, specific details)
- Municipal address
- Parking lots (yes/no)
- Road access to/on sites (if yes, is road accessible to public?)
- Ranch lands (yes/no)

- Trail access (hiking, skiing, motor vehicles)
- Nature Sanctuary (yes/no)
- Outdoor education (yes/no)
- School children visits (yes/no)

Human uses and activities at property sites can improve, maintain or degrade the biodiversity targets for which the sites were secured. It is recommended that the land trust adopt a policy regarding property use.

*Example: The Rideau Waterway Land Trust (RWLT) has a general policy of allowing low impact site activities – only activities that will ensure the continued preservation of natural features of the property are permitted. RWLT is not in the business of providing public recreation or of subsidizing the risks that site users may wish to take.*

Land trusts are in the business of securing and caring for essential biodiversity. Land trusts may identify specific “flagship” sites where access is permitted, activity signage is in place, trails are marked and monitored, and limited visits may occur for passive activities like walking or hiking. These are considered to be normal uses and activities, but at identified sites only, and they are identified as such in the Land Management Plan.

All other uses and activities are considered exceptional uses and activities, or are uninsured or prohibited under current insurance.

### **Easements or Covenants**

(Please refer to Table entitled Special Agreements)

### **Land Use Insurance and Risk Management**

Some land uses and activities are within the scope of activities that are risk-managed through liability insurance. Others are not and if they are critical to a site’s biodiversity targets, they are dealt with through alternate insurance arrangements.

#### **STEP 1: Consider the impact of the use or activity on biodiversity targets.**

- How does the use or activity affect the biodiversity targets & conservation goals for the site? If the use or activity is positive or neutral for the biodiversity target, proceed to Step 2.

#### **STEP 2: Establish “basic duty of care” for the property.**

- On sites where access is permitted, trails must be properly signed, maintained and hazards minimized. This will require periodic monitoring. The higher the use of the site, the more frequent the monitoring should be. All monitoring should be documented in writing.
- For all properties, perimeter signage must be put in place and any access points must have activity signage (i.e., dealing with access and trail use).
- All land uses need to be documented in the Land Management Plan.

#### **STEP 3: Look up corresponding activity in table to determine risk management strategy.**

**NORMAL  
LAND USES**

	<b>INDIVIDUAL USE</b>	<b>GROUP USE</b>
<b>Hiking or walking</b> (using marked trails)	<ul style="list-style-type: none"> <li>No special instructions if property is signed for this activity.</li> <li>Trails must be maintained and monitored for hazards. Insurer recommends that trails be checked frequently if public use is high.</li> <li>The land trust has public duty to protect the people invited to use these trails.</li> </ul>	<ul style="list-style-type: none"> <li>Give permission in writing.</li> <li>Group signs a waiver (<i>NCC Unsupervised Visitor Acknowledgement Waiver and Release, Appendix B</i>).</li> <li>Proof of minimum \$1M liability insurance with your land trust listed as additional insured.</li> <li>Trails must be checked and cleared of hazards, if public use is high.</li> <li>The land trust has a public duty to protect the people invited to use these trails.</li> </ul>

**EXCEPTIONAL  
LAND USES**

	<b>INDIVIDUAL USE</b>	<b>GROUP USE</b>
<b>Motorized vehicles</b> (ATVs, SUVs, trucks, quads, snowmobiles, motorboats, etc.)	<ul style="list-style-type: none"> <li>Give permission in writing.</li> <li>Signed a waiver.</li> <li>Proof of minimum \$1M liability insurance.</li> </ul>	<ul style="list-style-type: none"> <li>Give permission in writing.</li> <li>Group signs a waiver.</li> <li>Proof of minimum \$5M liability insurance with land trust listed as additional insured.</li> </ul>
<b>Camping</b> (NO campfires allowed)	<ul style="list-style-type: none"> <li>Give permission in writing.</li> <li>Signed a waiver.</li> </ul>	<ul style="list-style-type: none"> <li>Give permission in writing.</li> <li>Group signs a waiver.</li> <li>Proof of minimum \$1M liability insurance with land trust listed as additional insured.</li> </ul>
<b>Fishing/Biking/ Horseback riding/ Rock climbing or Spelunking</b>	<ul style="list-style-type: none"> <li>Give permission in writing.</li> <li>Signed a waiver.</li> </ul>	<ul style="list-style-type: none"> <li>Give permission in writing.</li> <li>Group signs a waiver.</li> <li>Proof of minimum \$1M liability insurance with land trust listed as additional insured.</li> </ul>
<b>Hunting or trapping</b>	<ul style="list-style-type: none"> <li>Give permission in writing.</li> <li>Signed a waiver.</li> <li>Proof of minimum \$1M liability insurance.</li> </ul>	<ul style="list-style-type: none"> <li>Give permission in writing.</li> <li>Group signs a waiver.</li> <li>Proof of minimum \$5M liability Insurance with land trust listed as additional insured.</li> </ul>
	<p>Liability insurance for individual hunters can be obtained from various sources. Some national or provincial wildlife federations and rifle associations offer liability insurance for hunters as part of membership fees or for an additional fee. The personal liability insurance component of a homeowner's policy may also cover hunting activities. If using this option, the hunter must confirm that hunting is covered by the policy.</p> <p>To show proof of minimum \$1M liability insurance, the hunter must provide 1) the name of the insurer, 2) the policy number, 3) the amount of personal liability insurance (minimum of \$1M), 4) the expiry date and 5) whether the coverage is through a wildlife organization (with specific hunting liability coverage) or their home insurance (i.e., general personal liability coverage).</p> <p><b>Ontario</b> Ontario Federation of Anglers (O.F.A.H.) and Hunters: "Each O.F.A.H. member with a home or tenant liability insurance policy has \$2M in additional public liability insurance coverage. The coverage includes lawsuits that result from an accident caused while hunting, fishing, and camping in connection with an O.F.A.H. activity, target shooting and conservation work. There is even a \$10,000 legal defence fund to help you fight any "careless use of a firearm" charges – this is unique coverage for hunters.</p>	

**UNINSURED**

**LAND USES & ACTIVITIES**

**RISK MANAGEMENT**

<p><b>Buildings on properties</b> (whether owned by the land trust or leased out for profit)</p>	<ul style="list-style-type: none"> <li>• For buildings on properties (except Interpretive Centres), land trust must purchase separate insurance policies.</li> </ul>
<p><b>Power tools</b> (chainsaws, etc.)</p>	<ul style="list-style-type: none"> <li>• Only trained or certified staff, or contractors with proof of insurance (minimum \$5M) are insured.</li> <li>• The use of power tools is a high-risk activity. Whenever possible, hand tools should be used instead.</li> <li>• No volunteers may use power tools.</li> </ul>

**SPECIAL AGREEMENTS**

**RISK MANAGEMENT**

**(Note: All legal agreements should be reviewed by legal counsel before signing)**

<p><b>Agricultural leases</b></p>	<ul style="list-style-type: none"> <li>• Proof of minimum \$1M liability insurance with land trust listed on policy as additional insured.</li> </ul>
<p><b>Timber extraction</b> (for profit)</p>	<ul style="list-style-type: none"> <li>• Proof of minimum \$1M liability insurance with land trust listed on policy as additional insured.</li> </ul>
<p><b>Water taking</b></p>	<ul style="list-style-type: none"> <li>• Proof of minimum \$1M liability insurance with land trust listed on policy as additional insured.</li> </ul>
<p><b>Other special agreements</b> (i.e., stewardship or custodianship agreements)</p>	<ul style="list-style-type: none"> <li>• Proof of minimum \$1M liability insurance with land trust listed on policy as additional insured.</li> <li>• Agreement must include a clause stating that the organization indemnifies and saves the land trust harmless against all claims associated with the stewardship of the property.</li> <li>• These requirements may be negotiable in some circumstances but should be discussed to determine the associated risks</li> </ul>
<p><b>Easements on properties owned by an individual (with no public access)</b></p>	<ul style="list-style-type: none"> <li>• Proof of minimum \$1M liability insurance, preferably with land trust listed on policy as additional insured.</li> <li>• Agreement should also save the land trust harmless from legal consequences of landowner not meeting easement conditions.</li> </ul>
<p><b>Easements on properties owned by an organization (with no public access)</b></p>	<ul style="list-style-type: none"> <li>• Proof of minimum \$1M liability insurance and land trust must be listed on policy as additional insured.</li> <li>• Agreement should also save the land trust harmless from legal consequences of landowner not meeting easement conditions.</li> </ul>
<p><b>Easements on properties with public access</b></p>	<ul style="list-style-type: none"> <li>• Proof of minimum \$5M liability insurance and land trust must be listed on policy as additional insured.</li> <li>• Agreement should also save the land trust harmless from legal consequences of landowner not meeting easement conditions.</li> </ul>

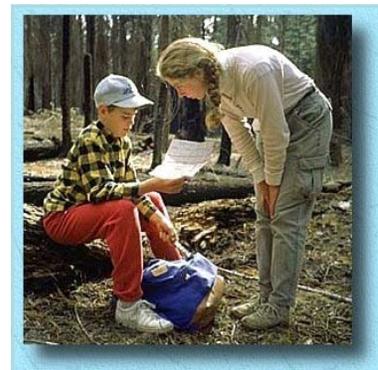
**OTHER ACTIVITIES**

**RISK MANAGEMENT**

<p><b>Major Events on owned property</b></p>	<ul style="list-style-type: none"> <li>• This activity should be covered by land trust insurance policy.</li> <li>• Needs proof of minimum of \$1M liability insurance for all groups touring the property during that event.</li> </ul>
<p><b>Donor tours/ Interpretive tours/field trips</b></p>	<ul style="list-style-type: none"> <li>• This activity should be covered by land trust insurance policy.</li> <li>• Take all safety precautions (leader with first-aid training, site warnings).</li> <li>• Any rental coach/bus operator used for a trip or tour must provide land trust with proof of minimum \$5M liability insurance.</li> </ul>
<p><b>Tours using aircraft</b> (For donor tours, stewardship activities, etc.)</p>	<ul style="list-style-type: none"> <li>• Once the charter operator is identified, ask for a Certificate of Insurance to be issued to the land trust listing the land trust as an additional insured.</li> <li>• Send this certificate, along with the dates of flight, to insurance agent.</li> </ul>
<p><b>Tours for school groups and other children’s groups</b></p>	<ul style="list-style-type: none"> <li>• This activity is not covered by land trust insurance policy (due to risk of child abuse related incidents).</li> <li>• The school board/organization must provide proof of minimum \$1M liability insurance for abuse coverage and the land trust must be listed on policy as an additional insured.</li> </ul>
<p><b>Volunteer activities</b></p>	<ul style="list-style-type: none"> <li>• Please refer to “Volunteer Insurance” for more information.</li> </ul>
<p><b>Personal vehicle use for land trust purposes</b></p>	<ul style="list-style-type: none"> <li>• Most insurance policies limit the business mileage permitted without “business insurance”. Staff needs to review their personal vehicle insurance policy to verify that their policy has “business insurance” for business usage of their vehicle.</li> <li>• Staff should carry a minimum of \$1M of vehicle liability insurance.</li> </ul>

It is extremely important to ensure that your volunteers are safe while doing work for your land trust. Every land trust must adopt risk management policies and procedures for ensuring the safety of their volunteers.

Ensuring that your volunteers are properly trained is the first step in risk management. Volunteers must be well informed of the potential risks involved in monitoring properties (e.g. poison ivy, rough terrain, open water, etc). Provide each team with a first aid kit with instructions, including emergency procedures in the event of an accident. The first aid kit must accompany the team on every site visit. A volunteer should never carry out a site visit alone; a second person should always accompany him/her. Do not allow volunteers to operate power equipment or chain saws.



Volunteers should sign an acknowledgement of risk form and “waiver of liability for hazardous activities”. (*OLTA Waiver of Liability for Volunteers, Appendix C*). In the event of an accident, volunteers who suffer either a loss or injury while working for your land trust must fill out an Accident/Incident Report. (*OLTA Incident Report, Appendix D*).

## **BEFORE MONITORING A PROPERTY Participant(s) should...**

1. Leave information regarding the trip plan, map, list of names, phone numbers, start/finish points and times with the staff and with a responsible person at home.
2. Document coordinates of site in order to direct emergency services and have maps/directions from the site to the nearest hospital.
3. Have a list of emergency phone numbers pertinent to the location, if 9-1-1 is not operational in the area list local numbers for Police, Ambulance and Poison Control.
4. Pack a charged cell phone and all emergency supplies including a well-stocked first aid kit and a plan of communications.
5. Ensure that at least one person in the group has qualified First Aid training and identify that person to the group at the beginning of the activity.
6. Identify an alternate member of the group to contact appropriate staff in the event of an incident involving the designated participant. The staff member contacted should guide the participant through steps.

## **Volunteer Insurance**

Most land trusts hold general liability insurance, which provides coverage for volunteers when they are working on the behalf of your organization. Volunteers are only covered by this insurance if they are doing work they are authorized to do and they follow your organization's policies and procedures. You should check with your insurance broker to ensure that coverage is adequate and appropriate.

Your land trust must demonstrate that it avoids circumstances in which harm could come to volunteers, and must do so in a responsible manner acting as a reasonable person would under the circumstances. Although there are no set guidelines for "due diligence", in most cases a judge would look at the specific circumstances and at the safety standards and practices of other organizations doing similar work, such as the Federation of Ontario Naturalists or the Bruce Trail Association. In this light, it is important that we provide volunteers with the tools and training, including advice on clothing requirements (gloves, boots, etc.), access to the land trust policies, manuals, and other pertinent materials.

If a volunteer steward (or anyone else) gets hurt on your land trust's property, it is important that you be able to demonstrate that due diligence was taken to eliminate and manage any risks to visitors or volunteers on a property, and to take every step possible to care for any incidents that occur.

The Nature Conservancy of Canada carries volunteer insurance. If a volunteer gets hurt through no fault of the Nature Conservancy of Canada (e.g., they fall and hurt themselves) and they require medical attention that is not covered by their own medical insurance, then Volunteer Accident Insurance covers these costs.

## The Training Session



Training is an essential component of your volunteer monitoring program. Provide your volunteers with the techniques to help them significantly contribute to the management of your properties. An important message for your volunteers is “not having to be an expert”. If a volunteer is intimidated by the notion that they “have to be an expert” to monitor a property, he/she will likely choose not to participate. Providing outreach and training to your volunteers will help to build capacity within your organization and local community.

Start by conducting a half-day introductory workshop. This type of workshop will introduce your volunteers to your organization, the types of properties you own or protect and the basic requirements for ensuring that the properties are properly managed. It is important that this workshop take place in the field with demonstrations. In this session, staff or a well-versed Board member can introduce the volunteers to topographic maps, aerial photographs, flora and fauna checklists, field guides, property binders and the types of activities

they should look for when filling out monitoring forms. At this workshop, it is best to provide some actual examples or scenarios of the types of activities they should look for when monitoring a property such as human encroachments, wildlife activity or natural disturbances such as floods or windfalls.

After the initial introductory workshop, you may want to offer workshops that are more specialized, that focus on certain aspects of property monitoring, such as flora and fauna identification. Inviting a local expert (i.e. birder, ecologist) is often of added interest to the participants. Consideration could also go into “train the trainer” workshops. This empowers volunteers to become local mentors and have volunteers share their experiences. Appendix E has examples of volunteer letters prepared by the Couchiching Conservancy. (*Couchiching Conservancy Volunteer Letters, Appendix E*)



*Orientation and training gives volunteers the ability to perform their jobs and manage your properties effectively.*

When putting your teams of volunteers together, it is beneficial to include team members who have the necessary skills, such as basic flora and fauna identification, so that they can teach other volunteers who may be interested in improving their identification skills. Adoption of volunteer management practices by your organization will help to retain your volunteers and build capacity both within your organization and the community as a whole. Training gives volunteers the ability to perform their jobs and manage your properties effectively. It should not only provide information but also help to develop skills and engender attitudes.

## What is in it for the Volunteers?

Volunteers have various goals and reasons for participating in local programs and can include the following:

- Gaining the satisfaction that comes from supporting a worthy cause in the interest of one's community
- Learning something new – Gaining new technical skills and knowledge
- Associating with others of similar interest and developing a sense of camaraderie – Making new friends
- Understanding and improving their local natural heritage
- Bringing their strengths and influences to the priorities of the land trust

### Annual Recognition and Reporting

It is imperative that you recognize your volunteers on a regular basis. You can do this in a variety of ways. They can be recognized as a whole at your Annual General Meeting or you can organize a special event, such as a wine and cheese reception and individually acknowledge their contributions. Present your volunteers with plaques, certificates or even gifts. Invite Team Leaders to report annually on the status of their properties. If you meet the needs of your volunteers and acknowledge them as a vital part of the team, they will feel appreciated and stay with your land trust longer.

## Do I Hire a Professional?

Credibility is one of the most difficult issues facing volunteer monitoring programs. Volunteers cannot collect the same quality and quantity of information as trained ecologists or biologists, nor should they be expected to. However, volunteers often do have the best knowledge of their local ecological community and given the appropriate support, volunteers can collect high quality information. Volunteers can also work collaboratively with land trust staff or professionals to collect the information that can help to make management decisions for a property. Working with professionals can often enhance the learning experience, lead to volunteer confidence and ultimately lead to more reliable information being collected. When recruiting volunteers, a land trust should consider recruiting some individuals with particular qualifications or technical expertise.

For routine monitoring, professional skills are usually not needed. Keep in mind, however, that at some point all land trusts must engage and, if necessary, pay for outside expert help in the event they do not have sufficient time or expertise in-house. This is especially true if a particular problem or issue arises, for preparing detailed management plans or monitoring some conservation easements where the collection of information is complicated and must be legally defensible. The use of students or volunteers for preparing management plans may not necessarily be appropriate under certain circumstances. For instance, plans that require management of particularly rare ecosystems or species may require the involvement of a specialized ecologist or biologist.

*Management of particularly rare ecosystems or species may require the involvement of a specialized ecologist or biologist.*