

SECTION C: GETTING ON THE LAND: *What to Look for When You Are Monitoring and the Tools to Use*

So now, your teams are ready to start monitoring their properties. The purpose of monitoring is varied and can include the general collection of information, assessing the effectiveness of management applications and assessing the state of the conservation values that are being protected. At the minimum, your teams should monitor the property on an annual basis, although it is preferable if your team can monitor the property during all four seasons of the year.

This will enable them to identify not only the changing landscape and wildlife use of the site but also the changing activities, which occur in different seasons, for example, hunting in the fall and snowmobiling in the winter. These activities may be restricted under a conservation easement or management plan and would only be observed in certain seasons.



What to Take With You

Before your team heads out to monitor a property, the team leader should take some important steps to ensure that the team is safe while on the land. First, the team leader should have co-ordinates (i.e. nearest intersection or landform) in the event that emergency services are required. He/She must have a well-stocked first aid kit and be sure that at least one person on the team has first aid training. The size and weight of the first aid kit should be dependent on how remote the property is. All volunteers must wear appropriate gear and be prepared for all weather types...sunshine and rain. Always take a compass and water on a site visit! You may also want to take along a whistle.

Volunteer Property Management Teams should review property binders before venturing out on their site visit. This will include reviewing the conservation objectives, site-specific requirements, management plans, baseline inventory reports, monitoring requirements and previous monitoring reports.

Monitoring Forms

An invaluable tool for your volunteers is a monitoring form. Your land trust Board members, staff or summer students, can develop this. Instruct volunteers on how to use the monitoring form and whenever possible give them on-site scenario training. The contents of your monitoring form will be framed by the management/stewardship plans prepared for your properties. They can be as detailed or as simple as your land trust chooses but they should allow the user to collect the data necessary to effectively manage your property and track change on the property over a long period of time. The forms should not be so complicated as to intimidate your volunteers but the information collected through them should be consistent.

The following is an example of a monitoring form prepared by the Couchiching Conservancy. It shows the type of information that should be collected by the volunteers. Both a long form and short form have been provided as references. After testing the monitoring form with volunteers, the Couchiching Conservancy discovered that the volunteers preferred working with the condensed version as it eliminated a lot of paper work. If the volunteers needed to include additional information, they would add notes to the one page monitoring form.

The cover sheet collects information about the time of year the property was inspected and by whom.

COUCHICHING CONSERVANCY

SITE INSPECTION REPORT



SITE NAME: Green Woods

DATE OF SITE VISIT: _____
(Circle Season) Date

Spring _____
Summer _____
Fall _____
Winter _____

August 23, 2003

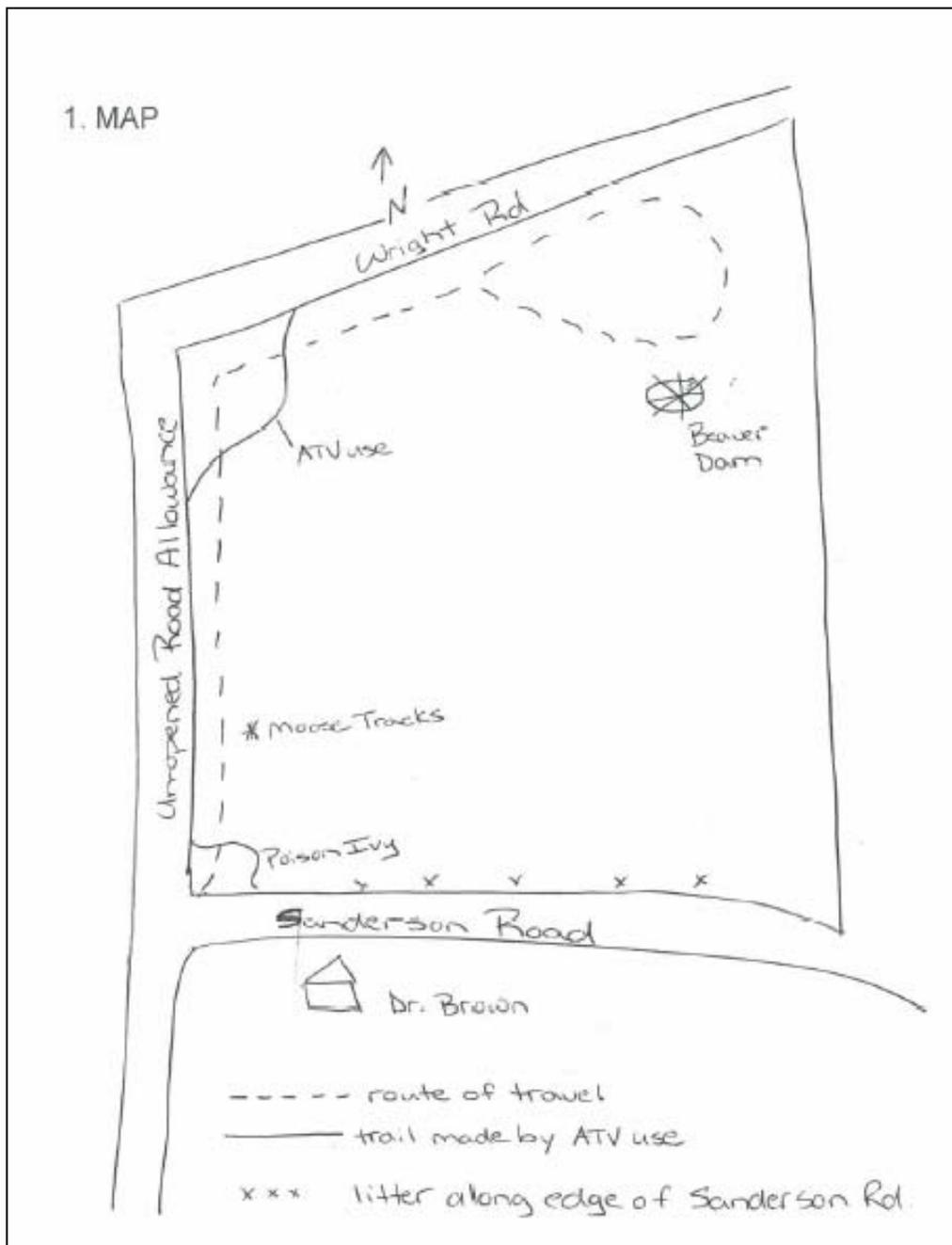
NAME OF SITE
INSPECTOR(S): Toba Doe

Brian Byrd

Dave Wolfe

Nancy Marsh

Section 1 is a Map of the property and allows the team members to show the whereabouts of certain characteristics on the property and their route of travel during the site inspection. You can use an existing topographical map or a hand-drawn map. GPS co-ordinates can also be used. During your first couple of visits, you should try to locate the boundary markers of your property. You can achieve this by finding an old fence line that marks the boundaries or better yet, the survey posts. Once you have located the survey posts you should mark them with flagging tape or stakes. Where possible, walk the boundaries of the property, as this is where violations are most likely to occur (i.e. dumping).



Section 2 addresses the type of recreation uses that are allowed on the property. If a prohibited activity is observed, note its location and any comments if discussions took place with the individual undertaking the activity. Prohibited and allowed uses should have been established in advance for the property through the property's management/stewardship plans.

2. RECREATION USES (Required)
 The following activities have been approved by the Couchiching Conservancy as either allowed or prohibited. Please circle those activities observed and provide a brief description. (These observations should be located on map)

	<u>Allowed</u>	<u>Prohibited</u>	<u>Describe</u>
i.e. hunting	<input type="checkbox"/>	<input type="checkbox"/>	
Formal Trails	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Informal Trails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Angling	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Hunting	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Berry Picking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Boating	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Birdwatching	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Bus Tours	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Camping	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Cross-country Skiing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Cycling	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Dog walking/training	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Equestrian Use	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Hiking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Motorized Vehicles	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ATV use
Nature Appreciation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Photography	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Picnicking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Rock Climbing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Skating	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Snowmobiling	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Snowshoeing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Swimming	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Trapping	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Other (Specify)	<input type="checkbox"/>	<input type="checkbox"/>	

ATVs have created a trail running between the unopened road allowance & Wright Rd. Due to the wetness of the site, considerable damage has occurred.

Section 3 identifies where any hazards are located. Noting their location will be important so that they can be addressed, if needed.

Section 4, Natural Disturbances should also be noted carefully as efforts may be required to ensure that they do not worsen with time.

Section 5 collects information on human disturbances to the property. Properties close to populated areas are more likely to encounter human disturbances.

3. HAZARDS (Required)
 (These observations should be located on the map)

bears	<input type="checkbox"/>	rattlesnakes	<input type="checkbox"/>	poison ivy	<input checked="" type="checkbox"/>
tree snags	<input type="checkbox"/>	old wells	<input type="checkbox"/>		
other (describe)	<input type="checkbox"/>				

Poison Ivy is prominent at the south-west corner of the property.

4. NATURAL DISTURBANCES (Required)
 (These observations should be located on map)

beaver dams	<input checked="" type="checkbox"/>	erosion	<input type="checkbox"/>	fire	<input type="checkbox"/>
flooding	<input type="checkbox"/>	siltation	<input type="checkbox"/>	heavy browsing	<input type="checkbox"/>
wind falls	<input type="checkbox"/>			non-indigenous species	<input type="checkbox"/>
other (describe)	<input type="checkbox"/>				

A beaver dam was noted at the north-east end of the property.

5. HUMAN DISTURBANCES (Required)
 (These observations should be located on map)

camping	<input type="checkbox"/>	ditching	<input type="checkbox"/>	dumping	<input type="checkbox"/>
feeding of wildlife	<input type="checkbox"/>	fires	<input type="checkbox"/>	herbicides	<input type="checkbox"/>
horseback riding	<input type="checkbox"/>	litter	<input checked="" type="checkbox"/>	logging	<input type="checkbox"/>
mountain bikes	<input type="checkbox"/>	pesticides	<input type="checkbox"/>	pets	<input type="checkbox"/>
poaching	<input type="checkbox"/>	stray animals	<input type="checkbox"/>	ditch work	<input type="checkbox"/>
plant harvesting	<input type="checkbox"/>	rock climbing	<input type="checkbox"/>	sign damage	<input type="checkbox"/>
motorized vehicles	<input type="checkbox"/>	road widening	<input type="checkbox"/>	cleaning mun. drains	<input type="checkbox"/>
informal shelters	<input type="checkbox"/>	timber theft	<input type="checkbox"/>	trampling	<input type="checkbox"/>
trapping	<input type="checkbox"/>	trespassing	<input type="checkbox"/>	vandalism	<input type="checkbox"/>
unauthorized uses	<input type="checkbox"/>	urban runoff	<input type="checkbox"/>	fence damage	<input type="checkbox"/>
other (specify)	<input type="checkbox"/>				

Litter was noted along the edge of Sanderson Rd.

Sections 6 and 7 allow the monitoring teams to note any flora and fauna observations or wildlife features. When the team first gets on a property, they may be very keen to note as many species as possible. With time, however, it is only necessary to note flora and fauna species of significance or those species not previously recorded.

6. Flora and Fauna Observations (Optional)

A) Wildlife Observations
(mammals, amphibians, reptiles, fish, birds, other)

Moose tracks noted on property

B) Vegetation
(trees, shrubs, plants)

Section 8 enables the teams to note any discussions they have with people visiting the property or adjacent neighbours. This information is valuable as neighbours or people who regularly use the site may know of other occurrences that your team may not have found. It is also an opportunity to explain the work of your land trust and the goals for managing that particular property. You may be able to recruit some new members for your monitoring team. On a negative side, your notes should include information regarding neighbouring landowners who may be attributing to problems on the property i.e. encroaching property boundaries, tossing of debris, firewood cutting, etc.

Section 9 allows the team to include any other information.

7. WILDLIFE HABITAT FEATURES (Optional)

Locate on the map unique or significant wildlife habitat features.

Examples: snags/cavity trees, brush piles, waterfowl nesting, conifer thickets, fallen trees, waterfowl feeding, dens, nests, wildlife trails, etc.

Beaver dam at north-east end of property

8. CONTACTS WITH NEIGHBOURS OR VISITORS (Optional)

(If feasible, obtain names and numbers of neighbours or visitors on site. Briefly describe nature of conservation)

When we came out of the property, we were approached by Dr. Brown, the neighbour who lives to the south of the property. He is interested in becoming a volunteer team member.

9. NOTES

(Provide any other relevant information obtained during site visit)

Lastly, Section 10 allows the team to make any recommendations to the Board for rectification of problems they may have encountered on the site. For example, if a fence has been cut allowing ATV use, the team may recommend re-erecting the fence.

10. RECOMMENDATIONS

WHAT	LEVEL OF URGENCY (When does the issue need to be dealt with?)	# OF VOLUNTEERS NEEDED AND WHO	EQUIPMENT NEEDED	COST	ACTIVITY COMPLETED
i.e. fencing - fencing has been removed allowing ATV access	Immediate attention should be brought to this issue as surrounding vegetation is being harmed.	5 - 2 local management committee members and 3 volunteers	posts and hole digger	\$500	
garbage removal, revegetation, repairs, signage, landowner contact, etc.					

Signage should be placed at the entrances of the ATV-use

Immediate - Due to severity of damage to surrounding vegetation

2 volunteers

signs
posts

\$100

The following is an example of the shorter form also used by the Couchiching Conservancy.

COUCHICHING CONSERVANCY
SITE INSPECTION REPORT

SITE NAME: _____

DATE OF SITE VISIT: _____

NAMES OF SITE INSPECTORS: _____

SECTIONS OF PROPERTY VISITED: _____

ANY HAZARDS NOTED: _____

NATURAL OR HUMAN DISTURBANCES: _____

NOTABLE FLORA AND FAUNA: _____

CONTACTS WITH NEIGHBOURS OR VISITORS: _____

FOLLOW-UP NEEDED ON ANY ISSUES: YES _____ NO _____

Please use additional sheets if needed for further details, and mark any hazards, disturbances or significant features on a sketch map. Refer to the management plan for permitted/prohibited uses. If follow-up needed, contact your Board liaison or the Conservancy office (326-1620).

Again, the monitoring form can be as simple as your land trust chooses as long as the type of information collected is detailed and consistent. (*OLTA Site Inspection Report, Appendix F and OLTA Monitoring Report, Appendix G*)

The Nature Conservancy of Canada has also put together a similar monitoring form. (*NCC Monitoring Report Form, Appendix H*). A copy of the site inspection report from The Alberta Environmental Protection Volunteer Stewardship Kit Binder has also been included. (*Alberta's Protected Area - Site Inspection Report, Appendix I and OLTA Protected Area -Site Inspection Report, Appendix J*)

Your team should visit the property four times a year, once during each season. During the visits, teams should try to walk different parts of the property remembering to describe the activities in and around the property, including those on adjacent lands. If your group chooses to go on to adjacent properties, they should obtain permission from the landowner first. If a prohibited use is occurring on the property, document the information in the monitoring form and then have the team leader follow up with the Board member, to discuss with the Board. The team should also review the stewardship/management plan to determine if the conservation goals of the property are being met or enhanced i.e. plantings. Note and record all changes to the property, both natural and human-related.



In addition to filling out the monitoring forms, take photos of the property. These photos are important not only for identifying areas of concern but will track the property over time as it slowly changes. Video tapes can also be used.

The Property Binder

A useful tool for the property team is a property binder or property file. The purpose of the property binder is to hold all relevant information about the property and to provide monitoring volunteers with updated information from previous site visits. When volunteers monitor a property for the first time, they will find it useful to review this previous information. The basis of the binder is created by the collection of data during acquisition of the property. This includes but is not limited to:

- Maps (topographic, lot and concession, GIS, etc.)
- Aerial photographs
- Background data on the property i.e. biophysical information
- Management Plan
- Legal agreements such as a deed or conservation easement
- Survey

Photocopies and **not the original documents** should be included in the binder. Original documentation should be safely stored in the Land Trust office or if the organization does not have an office, in the care of a designated Board member. All legal documentation must be stored in a firebox (see below). The remainder of the binder should contain information collected by the management teams during their site visits to the property. This information includes but is not limited to:

- Monitoring forms
- Photographs
- Names and numbers of the monitoring team, including the key Board contact
- Names of adjacent landowners
- Letters of authorization and appointment and an undertaking by the volunteers to fulfill the duties
- Correspondence with adjacent landowners and people encountered on the property during site visits

The property binder is not a replacement for the “in-house” property file. The Team Leader should be responsible for holding on to the binder and updating it with the quarterly monitoring forms and photographs taken during site visits. Your land trust may choose to retrieve the binders on an annual basis to either copy the information, transfer the data into electronic documents, store the photos in an archive or simply share the binders with members during an Annual General Meeting.

The property binder is not a replacement for the “in-house” property file.

Storage of Records

There is constant debate about whether or not to keep written or electronic documentation for your monitoring reports. The best decision is to keep both. Record keeping is an essential part of a land trust’s role. It is important to copy and keep all original legal agreements, studies, appraisals, surveys, and inventories in a separate, safe location. Fireboxes are essential. File all the information collected through monitoring, including monitoring reports for owned properties and easements, site visit interviews, photos, and attached dates. Photocopies are used in the field and for the property binders. Keep a copy of all original documents with one key individual within the organization, such as an Executive Director or the President or Chairman of the Board or staff. Establish a sign-out procedure for staff or volunteers who wish to review any original documentation. Only use original documents for legal purposes such as a violation to an easement. (*Land Trust Alliance Record Keeping Policy, Appendix K*)

Only use original documents for legal purposes such as a violation to an easement.