A Volunteer's Manual for Land Management

March 2005

ONTARIO LAND TRUST ALLIANCE

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Ontario Land Trust Alliance

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ACKNOWLEDGEMENTS

This manual was prepared using examples of work being undertaken by many land trusts in both Canada and the United States. Many thanks to these groups for allowing us to use their sample forms.

Much of the information contained in the manual has been built upon the work of the Couchiching Conservancy, a land trust based in Orillia, Ontario.

A special 'Thank you' to Ron Reid, Executive Director, Couchiching Conservancy, who provided editorial comments.

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Ron Reid of Couchiching Conservancy
Simon Lunn of Rideau Waterway Land Trust

Cover Photos:
i) Volunteer, Robin Bloom monitoring a property for the Couchiching Conservancy
ii) Shoreline at Red Rock on Big Rideau Lake by Simon Lunn

ONTARIO LAND TRUST ALLIANCE
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Table of Contents

Section A: Introduction

SECTION A: INTRODUCTION

We have witnessed a rapid growth in the number of community-based, volunteer land trusts over the past few years. These trusts are providing a vehicle for those who want to commit their energy and resources into land protection and management. While community-based land trusts are still relatively new to Ontario, many of them have achieved some notable accomplishments. At the same time, they have faced considerable challenges to keep up with their successes.

When it comes to land management, there may be a tendency to lose momentum once the property has been secured. We believe that our jobs are done and move onto the next securement project. In truth, our job has just begun!

The purpose of this manual is to assist land trusts in managing their lands with the help of volunteers. It is to be treated as a guide only. Land trusts may choose to use the manual's ideas and recommendations or to tailor the information to fit their specific needs. Many of the ideas and approaches have been extracted from excellent publications and/or have been shared with us by the experiences of land trusts in Ontario and the United States. Most notable are those references provided by the Land Trust Alliance. These references can be found at the end of the manual.

If you have been involved in the land trust movement, you are familiar with the dedication required to get a land trust up and running. It then takes an energetic group of people to tackle their first securement project. Individuals spend countless hours meeting with the landowners, writing letters or raising the funds to acquire a piece of land. But what happens once that piece of property is protected? Contrary to our efforts in trying to protect that piece of land, when it comes to its management, there may be a tendency to lose momentum after the property has been secured. We believe that our jobs are done and move onto the next securement project. In truth, our job has just begun!

Section B: Volunteers

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.

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.

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	INDIVIDUAL USE	GROUP USE
Hiking or walking (using marked trails)	• No special instructions if property is signed for this activity. • Trails must be maintained and monitored for hazards. Insurer recommends that trails be checked frequently if public use is high. • The land trust has public duty to protect the people invited to use these trails.	• Give permission in writing. • Group signs a waiver *(NCC Unsupervised Visitor Acknowledgement Waiver and Release, Appendix B).* • Proof of minimum $1M liability insurance with your land trust listed as additional insured. • Trails must be checked and cleared of hazards, if public use is high. • The land trust has a public duty to protect the people invited to use these trails.

EXCEPTIONAL LAND USES	INDIVIDUAL USE	GROUP USE
Motorized vehicles (ATVs, SUVs, trucks, quads, snowmobiles, motorboats, etc.)	• Give permission in writing. • Signed a waiver. • Proof of minimum $1M liability insurance.	• Give permission in writing. • Group signs a waiver. • Proof of minimum $5M liability insurance with land trust listed as additional insured.
Camping (**NO** campfires allowed)	• Give permission in writing. • Signed a waiver.	• Give permission in writing. • Group signs a waiver. • Proof of minimum $1M liability insurance with land trust listed as additional insured.
Fishing/Biking/ Horseback riding/ Rock climbing or Spelunking	• Give permission in writing. • Signed a waiver.	• Give permission in writing. • Group signs a waiver. • Proof of minimum $1M liability insurance with land trust listed as additional insured.
Hunting or trapping	• Give permission in writing. • Signed a waiver. • Proof of minimum $1M liability insurance.	• Give permission in writing. • Group signs a waiver. • Proof of minimum $5M liability Insurance with land trust listed as additional insured.
	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. 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). **Ontario** 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.

UNINSURED LAND USES & ACTIVITIES — RISK MANAGEMENT

Buildings on properties (whether owned by the land trust or leased out for profit)	• For buildings on properties (except Interpretive Centres), land trust must purchase separate insurance policies.
Power tools (chainsaws, etc.)	• Only trained or certified staff, or contractors with proof of insurance (minimum $5M) are insured. • The use of power tools is a high-risk activity. Whenever possible, hand tools should be used instead. • No volunteers may use power tools.

SPECIAL AGREEMENTS — RISK MANAGEMENT

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

Agricultural leases	• Proof of minimum $1M liability insurance with land trust listed on policy as additional insured.
Timber extraction (for profit)	• Proof of minimum $1M liability insurance with land trust listed on policy as additional insured.
Water taking	• Proof of minimum $1M liability insurance with land trust listed on policy as additional insured.
Other special agreements (i.e., stewardship or custodianship agreements)	• Proof of minimum $1M liability insurance with land trust listed on policy as additional insured. • 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. • These requirements may be negotiable in some circumstances but should be discussed to determine the associated risks
Easements on properties owned by an individual (with no public access)	• Proof of minimum $1M liability insurance, preferably with land trust listed on policy as additional insured. • Agreement should also save the land trust harmless from legal consequences of landowner not meeting easement conditions.
Easements on properties owned by an organization (with no public access)	• Proof of minimum $1M liability insurance and land trust must be listed on policy as additional insured. • Agreement should also save the land trust harmless from legal consequences of landowner not meeting easement conditions.
Easements on properties with public access	• Proof of minimum $5M liability insurance and land trust must be listed on policy as additional insured. • Agreement should also save the land trust harmless from legal consequences of landowner not meeting easement conditions.

OTHER ACTIVITIES	RISK MANAGEMENT
Major Events on owned property	• This activity should be covered by land trust insurance policy. • Needs proof of minimum of $1M liability insurance for all groups touring the property during that event.
Donor tours/ Interpretive tours/field trips	• This activity should be covered by land trust insurance policy. • Take all safety precautions (leader with first-aid training, site warnings). • Any rental coach/bus operator used for a trip or tour must provide land trust with proof of minimum $5M liability insurance.
Tours using aircraft (For donor tours, stewardship activities, etc.)	• 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. • Send this certificate, along with the dates of flight, to insurance agent.
Tours for school groups and other children's groups	• This activity is not covered by land trust insurance policy (due to risk of child abuse related incidents). • 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.
Volunteer activities	• Please refer to "Volunteer Insurance" for more information.
Personal vehicle use for land trust purposes	• 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. • Staff should carry a minimum of $1M of vehicle liability insurance.

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.

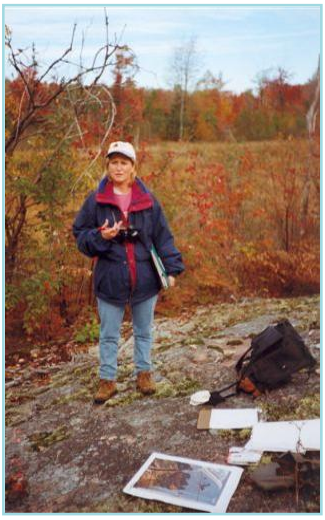
Most land trusts hold general liability insurance, which provides coverage for volunteers when they are working on the behalf of your organization. Volunteers are only covered by this insurance if they are doing work they are authorized to do and they follow your organization's policies and procedures.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

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Section C: Getting on the Land

What to Look for when you are monitoring a property and the tools to use

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

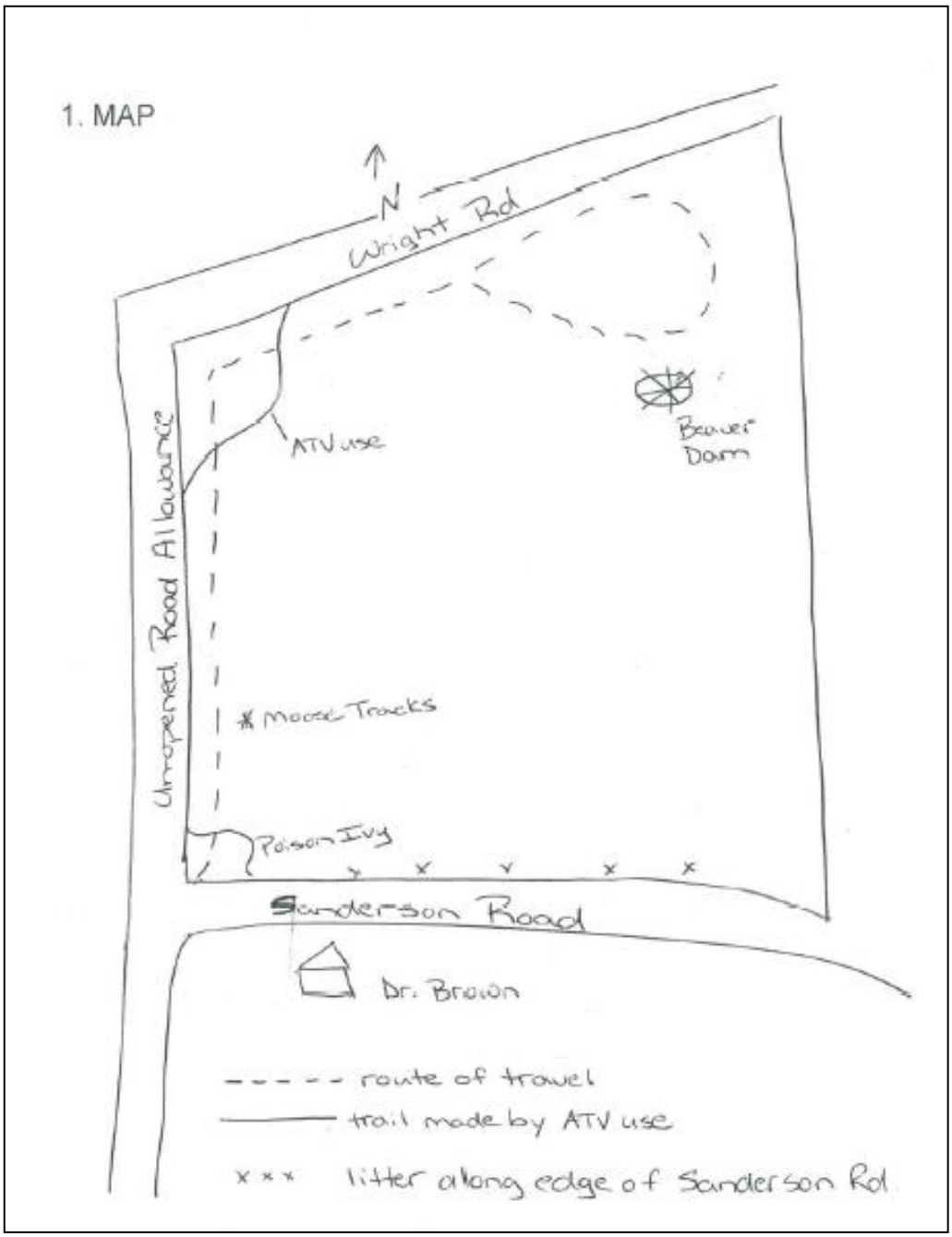
SITE NAME: Green Woods

DATE OF SITE VISIT: Date
(Circle Season)

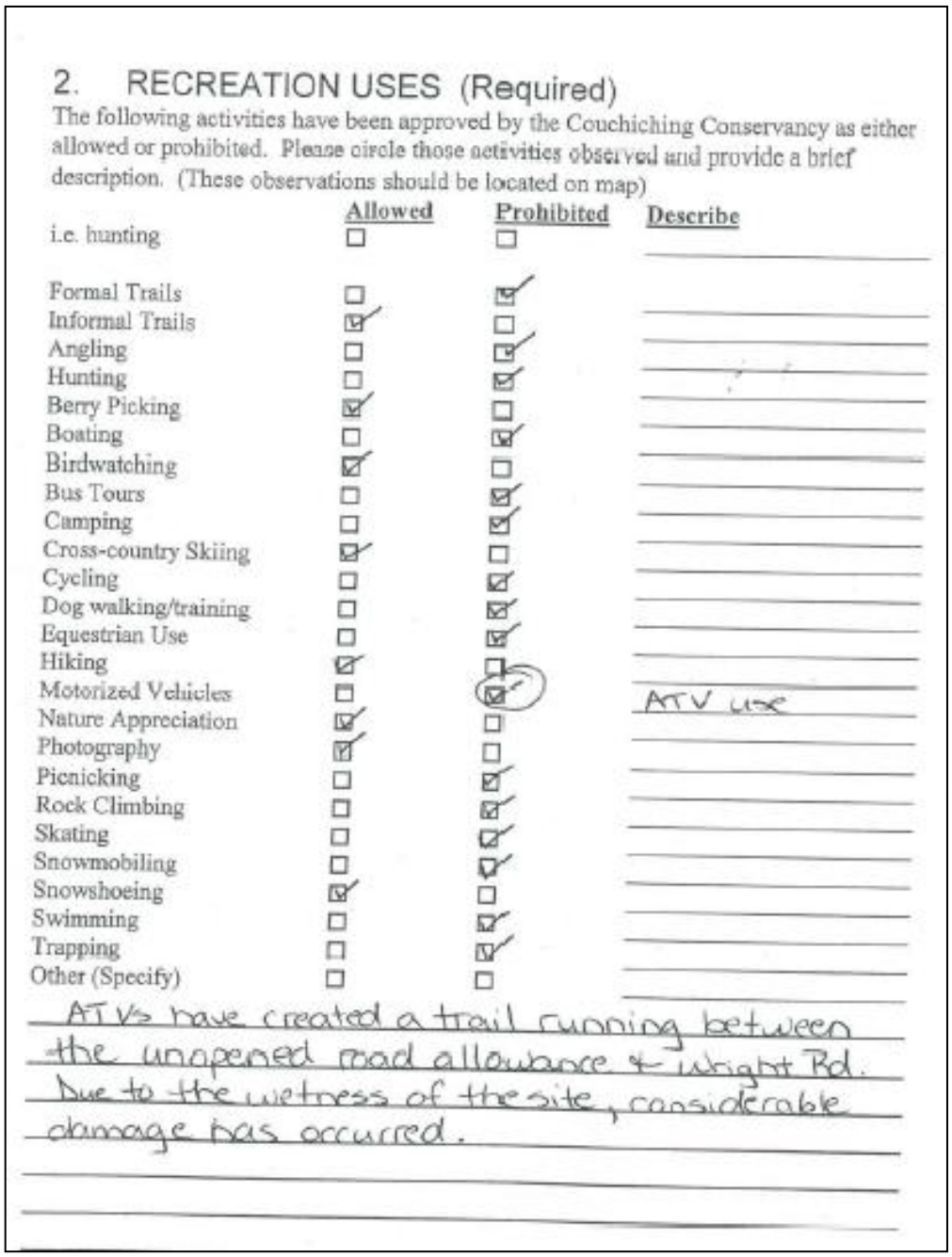
Spring
Summer — August 23, 2003
Fall
Winter

NAME OF SITE INSPECTOR(S): John 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)

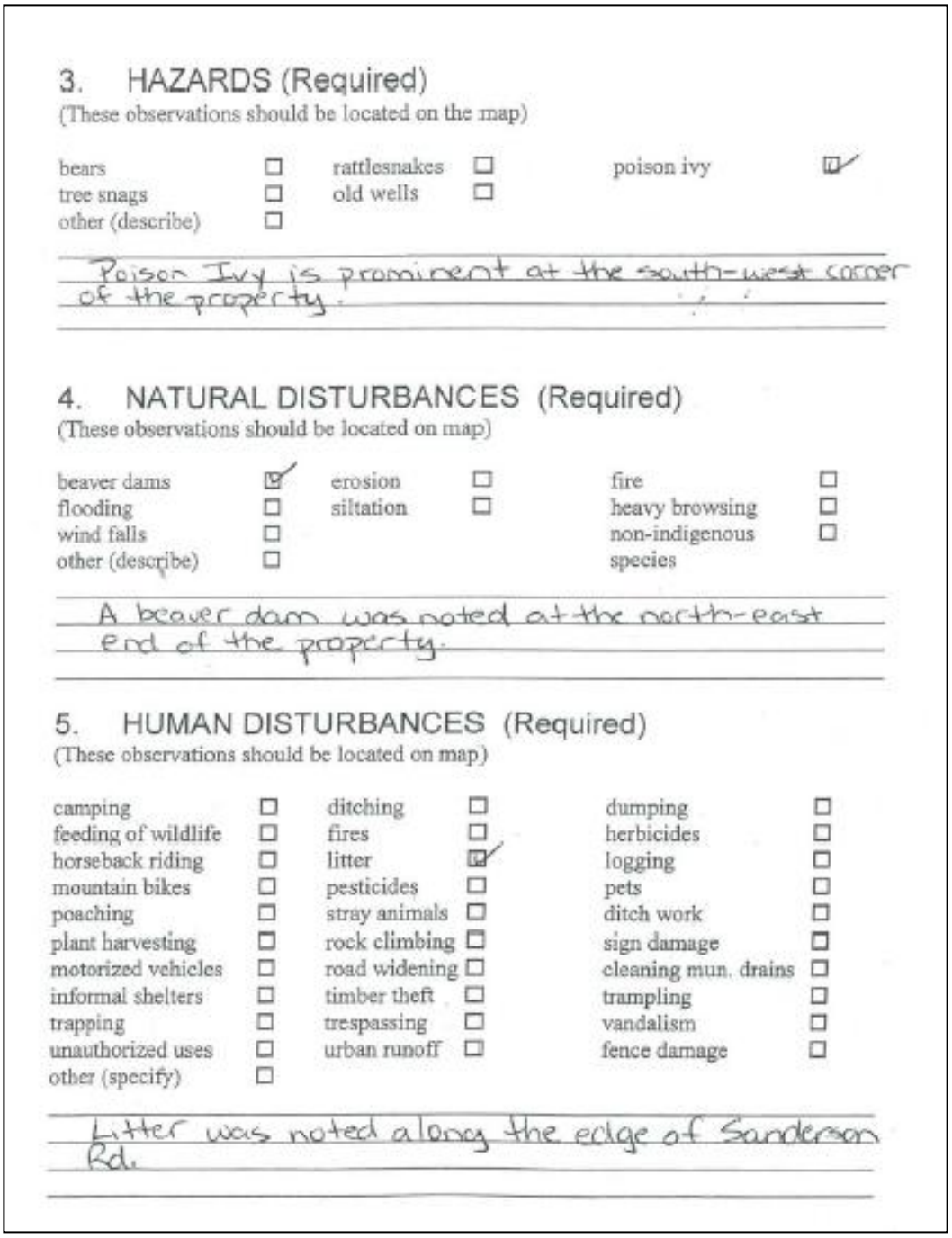
	Allowed	Prohibited	Describe
i.e. hunting	☐	☐	
Formal Trails	☐	☑	
Informal Trails	☑	☐	
Angling	☐	☑	
Hunting	☐	☑	
Berry Picking	☑	☐	
Boating	☐	☑	
Birdwatching	☑	☐	
Bus Tours	☐	☑	
Camping	☐	☑	
Cross-country Skiing	☑	☐	
Cycling	☐	☑	
Dog walking/training	☐	☑	
Equestrian Use	☐	☑	
Hiking	☑	☐	
Motorized Vehicles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

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	☐	rattlesnakes	☐	poison ivy	☑
tree snags	☐	old wells	☐		
other (describe)	☐				

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	☑	erosion	☐	fire	☐
flooding	☐	siltation	☐	heavy browsing	☐
wind falls	☐			non-indigenous	☐
other (describe)	☐			species	

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

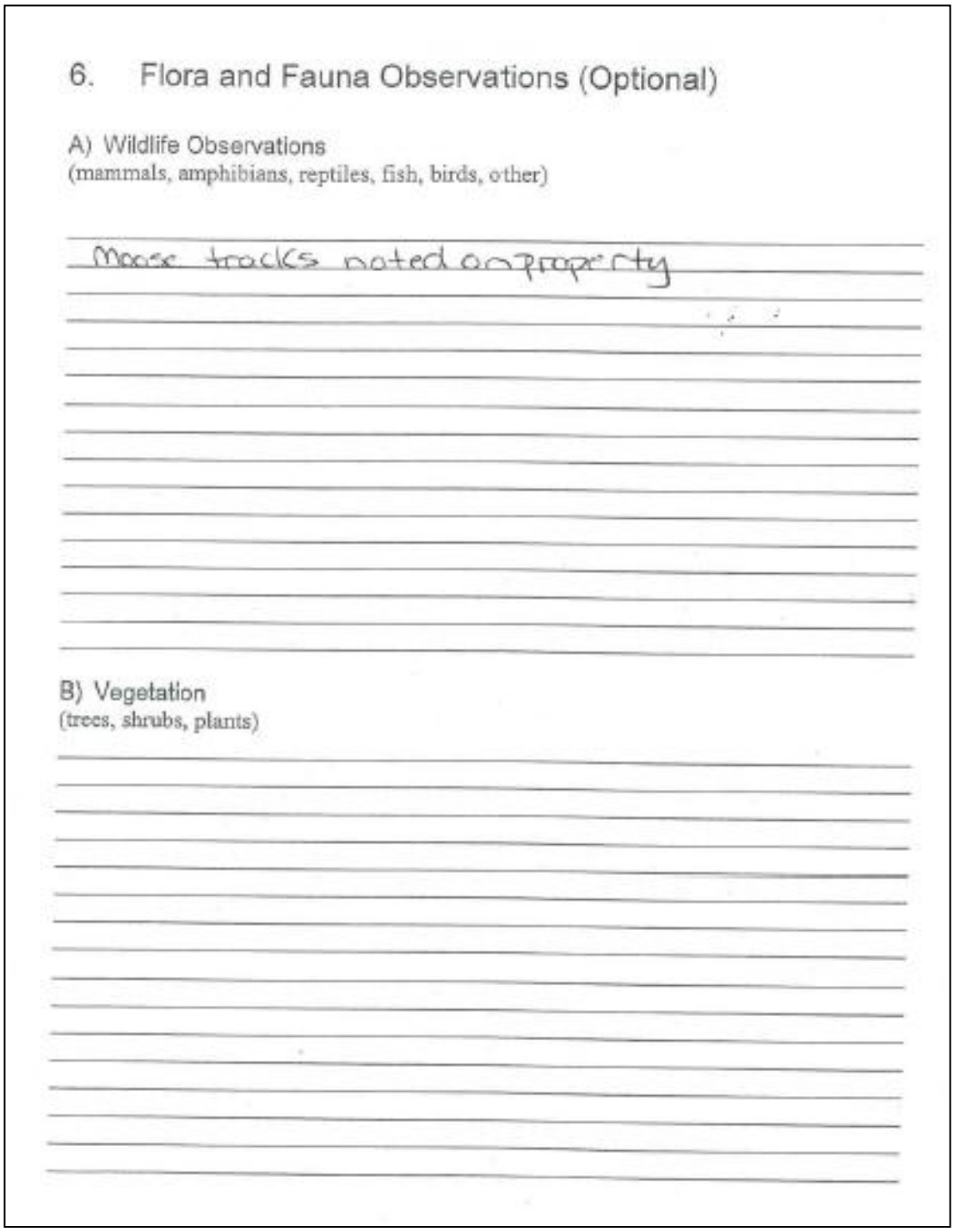
5. HUMAN DISTURBANCES (Required)

(These observations should be located on map)

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

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)

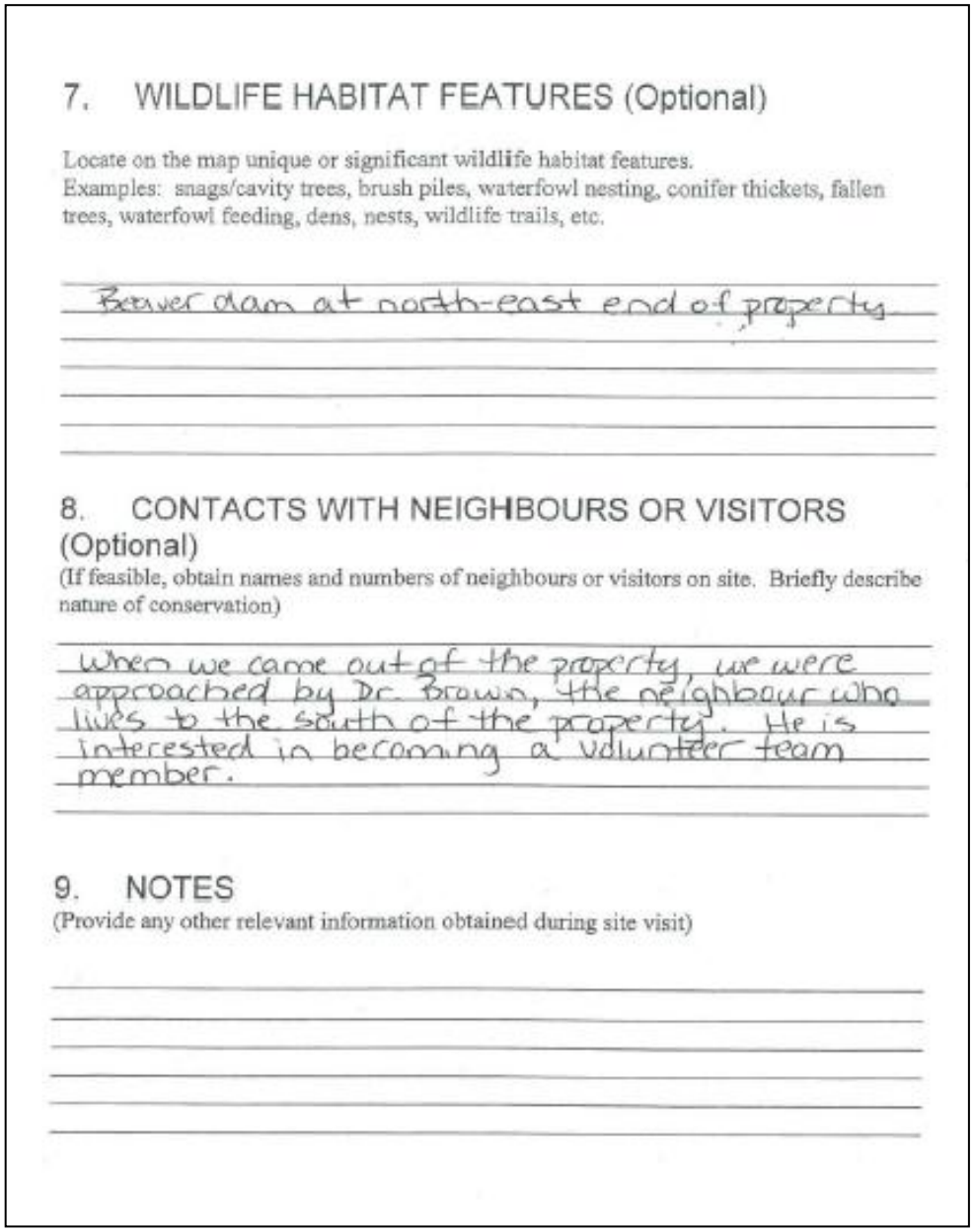
A) Wildlife Observations
(mammals, amphibians, reptiles, fish, birds, other)

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)

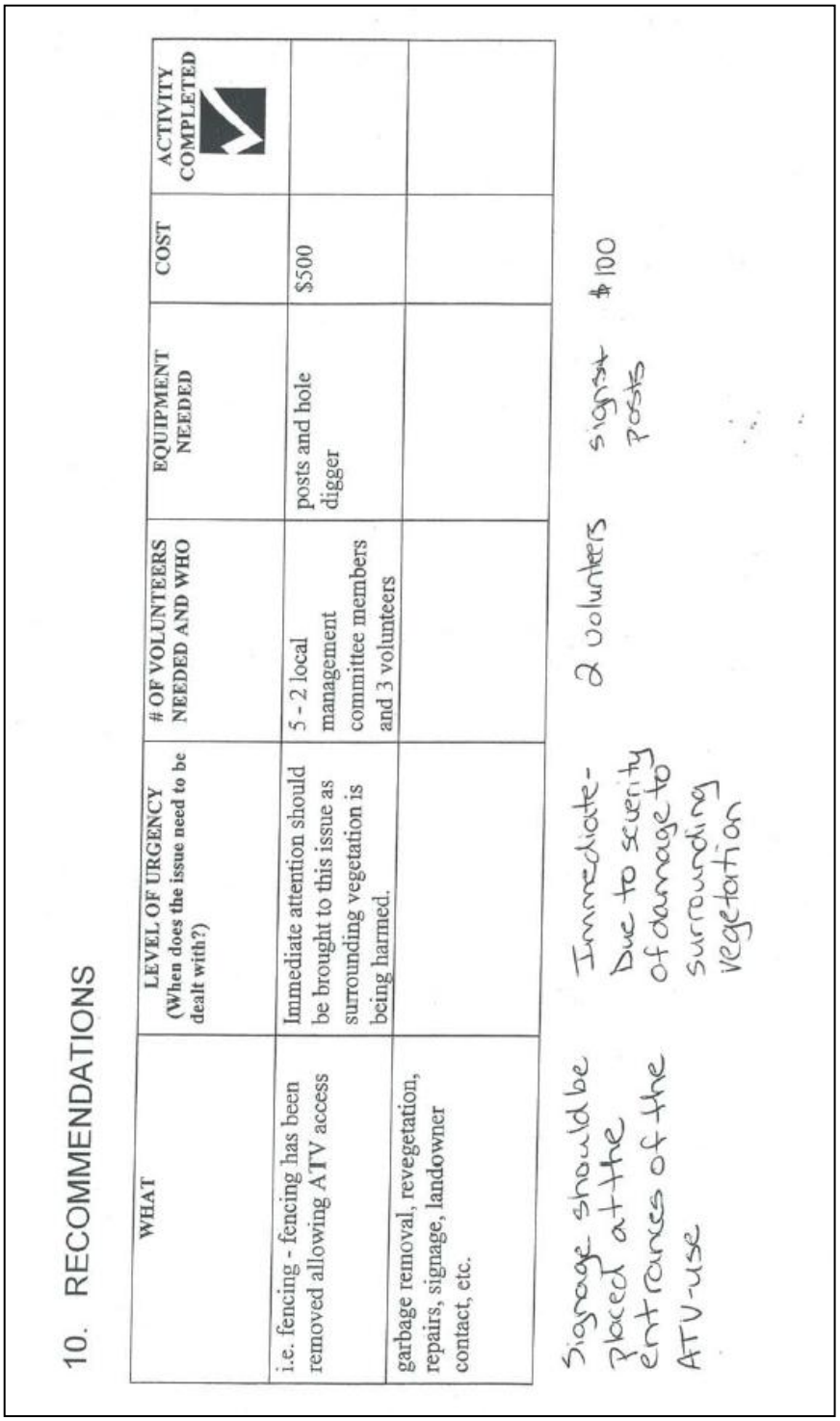
(If feasible, obtain names and numbers of neighbours or visitors on site. Briefly describe nature of conservation)

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.

Section D: Preparing a Management Plan

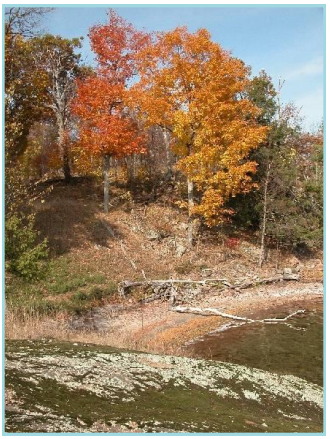
SECTION D: PREPARING A MANAGEMENT /STEWARDSHIP PLAN

Now that you own the property…how will you manage it? All your properties will require at least some responsible management. Some, such as those with the potential of high public use, will require management that is more intensive. Preparing a management plan can be less complicated than one might think. Summer students or volunteers with an environmental science, ecology or biology background can be utilized as long as they have sufficient knowledge and training in species identification, community classification and mapping.

The management plan will set out how the trust makes decisions so it is important that it be done properly.

The management plan will set out how the trust makes decisions so it is important that it be done properly. It is essential that a clear description of the land's ecological values be recorded at the time of acquisition or at least within six months of securing the property. When a property is secured, some activities usually require immediate attention. These can include boundary definition (eg. fencing) access control, or any number of other pressing management needs. These activities can be carried out while a management plan is being prepared. Eventually, you should consider undertaking a full feature inventory of the site and amend your management recommendations to reflect what you have found.

Often, the natural heritage information about your property already exists. Information on its natural heritage significance can usually be found at a local conservation authority office, the Ministry of Natural Resources, federal offices, in a municipal official plan, colleges and universities or even from your local naturalist club. This information can be confirmed by visiting the property with a biologist or ecologist. Also, do not forget to consult individuals who know the site, such as neighbours or local naturalists.



Management plans should take a holistic approach, taking into account the lands that surround them. They should include a description of how the property fits into the larger landscape. This can be determined by looking at aerial photos, Ontario Base Maps, walking around the perimeter of the property, traveling adjacent roadsides or finding a high viewpoint from which you can see surrounding properties. Your goal is to enhance the significance of your property by managing it in context or a larger landscape (i.e. expanding the size and connectivity of significant woodlots, improving riparian habitats along a stream, etc.).

Deciding what to include in your management options is difficult and is dependent on a number of different factors. Management planning decisions sometimes will entail controversial decisions on what activities will be allowed. These can often be guided by the policies and principles of the land trust (e.g. your land trust will not allow hunting on the property). More importantly, it will be guided by the ecological importance of the site. The size and diversity of the site and the level of information available will determine how detailed the plan is. This is discussed further under Management Strategies.

The following planning process for developing a Management Plan was taken from the Ontario Land Trust Alliance's 2003 Securement Manual. A more detailed list of site planning and management steps can be found in the Nature Conservancy of Canada's Stewardship Manual and the Conservation Planning Training Manual prepared by the Centre for Land and Water Stewardship, University of Guelph, and the Credit Valley Conservation.

Management Planning Process

Step 1: Gather and assess information in terms of impacts and threats

Assemble all biological and physical information on the property and identify linkages to the surrounding landscape. An area is protected because of features or overriding considerations such as the presence of an endangered species or the presence of a particularly representative or rare habitat. Step 1 ends with taking the available biophysical information and determining the property's most significant features. By identifying what is most significant you can best focus your management activities, priorities and set goals. Map the areas most sensitive to human impacts and flag actions to protect these sensitive areas. Significant and sensitive features may often be the same.

The Ecological Land Classification for Southern Ontario is a tool most often used by individuals and groups preparing inventories and management plans. The Ecological Land Classification System for Southern Ontario is a detailed scientific approach to describing the vegetation communities of southern Ontario. It provides a more standardized framework and terminology than just using your own judgment. It is a nested system of community classification: system – community class – community series – ecosite – vegetation type, each level providing a more detailed description.

Step 2: Set working goals and objectives

Do not confuse conservation tools with goals. For example, community involvement is almost always essential but it should not be your main goal – your trust likely exists to protect a specific landscape, habitat or species. That is your goal. Working with the community is the tool you might use to accomplish that goal.

A goal may be to maintain natural processes and habitats based on pre-European settlement conditions to preserve important habitats. On the other hand, management may focus on protecting one species. Alternatively, the site may be used primarily for environmental education to heighten awareness and protect the surrounding ecosystem. A clear purpose is essential.

Have clear goals and know your tools. Do not confuse conservation tools with goals. For example, community involvement is almost always essential but it should not be your main goal – your trust likely exists to protect a specific landscape, habitat or species. That is your goal. Working with the community is the tool you might use to accomplish that goal.

In Step 1, impacts and threats are identified. However, after a goal(s) are set, the impacts and threats should be revisited. What might have been a problem before may be less of an issue after a goal is set.

Objectives are action-oriented to meet your goal. For example, an objective may be to carry out a prescribed burn of remnant tallgrass prairie or to reforest part of a woodland block to create more interior habitat in time.

Step 3: Determine strategies and actions

How are you going to meet your objectives? Devise and implement strategies or actions on the ground. In the case of a prescribed burn, an appropriate strategy would involve contacting the MNR prescribed burn team, as well as the local fire department and neighbours, obtaining the required permits, scheduling the event, setting in place an emergency plan, and conducting the burn on the appropriate day using qualified personnel. In most cases, volunteers will carry out less dangerous but essential tasks such as monitoring or trail maintenance.

Step 4: Monitor and report

Lastly, how will you monitor your success in implementing actions and monitor the ecological health of the property? To monitor your success in implementing actions you need to know if you have effectively met your objectives. You may find you can do more, or that you cannot accomplish the set objectives. When monitoring the ecological health of the property you are determining the health of your property. By monitoring both you can judge how effective your actions are. It is important to keep records and to include the results of monitoring within the management plan or as a follow-up document. Monitoring is complete when you have revised your working goals and objectives and carried out the next round of management activities based on previous work. Keeping a good record of the planning process will be very helpful in developing a sound management plan.

Keeping a good record of the planning process will be very helpful in developing a sound management plan.

The following identifies the components that you should include in your management / stewardship plans.

Location:

County/region, municipality/town, adjacent or nearest road, road at any access point, lot/concession, property role number (latitude and longitude or NTS map sheet/UTM)

(Example: This property is described as Parts of Lots 15 and 16, Concession 3, in the Town of the Blue Mountains (formerly Township of Collingwood), County of Grey)

Size:

Acres and/or hectares

(Example: The property is 4.15 hectares or 10.25 acres)

Description:

A brief textual description of the site and its natural and cultural features, topography, vegetation, physiography, soils, interesting or significant species or features, accessibility, use, etc.

(Example: This property is found within the Town of Blue Mountains in the northeastern region of Southern Ontario. Major centres in the area include Craigleith 2-3 km to the north and Collingwood 8 km to the east. Access to the site is gained from Highway 26. The property is part of a life science Area of Natural and Scientific Interest (ANSI) known as the Blue Mountain Slopes Life Science ANSI. The Blue Mountains Slopes Life Science ANSI provides one of the best examples of north-facing Niagara Escarpment shale slope and shale valley slope features. Examples of dry successional forests, as well as Red Oak forests are found in this area. Open bluffs and White cedar-dominated shale slopes are of significance in the area. A wide range of physiographic features, climates, vegetative types, flora and fauna are found in this area.)

Background:

The management issues that need to be addressed, such as the state of current knowledge, effectiveness of current management, use of the property by visitors, plant poaching, state of repair of fences, boardwalks, trails, parking, adequate signage or interpretive signage information, surrounding land uses or infrastructure. A statement on possible future securement of adjacent land may be appropriate, notably when the ecological site extends beyond the existing property boundary.

(Example: This property was part of the land trust's acquisition list and was acquired in 1999. It forms part of a larger area acquisition plan. Efforts should be made to secure all adjacent properties. Thicket communities to the west were at one point cleared for either agricultural crops or pasture. Prolific growth in the area is allowing them to naturally regenerate into their former forest communities.)

Environmental Information or Habitat Type:

A description of the habitats or vegetation types found on the property, this can be expressed either as a percentage of the overall site or in acres/hectare. A simple approach to describing habitats may be desirable, such as that adapted from the publication entitled "Ecological Land Classification for Southern Ontario" available from Ontario Nature.

Aquatic

- Open water (lake, river or stream)
- Wetland
- Marsh (or meadow-marsh)
- Swamp (thicket, deciduous, conifer)
- Fen
- Bog

Terrestrial

- Shoreline (beach/bar, sand dune, bluff, rock shore)
- Cliff, talus, crevice, cave
- Rockland or alvar
- Sand barren
- Tall grass prairie or savannah
- Cultural grassland (field, crop), thicket, savannahs

- Forest (conifer, mixed, deciduous)
- Plantation forest

(Example: The thicket community in the lowland area is dominated with an assortment of young trees and shrubs including Hawthorne, Apple, Willow, Alternate-leaved Dogwood and Sugar Maple. Mature White Elm, White Ash, and Eastern White Cedar are also found within the community, but do not form a canopy. The lack of canopy supports the dense understorey and groundcover. Poison Ivy is prevalent in this area. This area is not well drained and remains saturated through the spring and summer. The upland forest is a mature Sugar Maple Forest with a semi-closed canopy. Unlike the transitional community to the east, the understorey of this forest is low with patchy groundcover. In addition to Sugar maple, Ironwood, White Ash and American Beech are also found in the canopy. This community is part of a much larger forest extending into the adjacent properties to the north, south and west of the property.)

Physiography:

A summary of the physiography or geology of the site expressed, where appropriate, either as a percentage of the overall site or as acres/hectares. A simplified approach to physiography may be desirable, such as that used to characterize physiographic regions and features (in Chapman and Putnam, 1984)

Natural Heritage Feature Description:

- Wetland (provincially significant, regionally significant, unevaluated)
- Area of Natural and Scientific Interest (ANSI, provincial or regional)
- Environmentally/ecologically sensitive/significant area (ESA; municipal, CA)
- Threatened or endangered species habitat
- Significant wildlife habitat (e.g. avifauna, herpetofaunal, etc; concentrations of wildlife; areas important for wildlife movement, feeding, breeding, hibernation, etc; and, habitat of other species-of-concern or species-at-risk, that are not “threatened” or “endangered” species)
- Significant woodland (a woodland that is ecologically important because of its features or functions, or contributes to the quality or diversity of an area)
- Significant valley land (a valley land that is ecologically important because of its features or functions, or contributes to the quality or diversity of an area)
- Fish habitat (presence of permanent or intermittent water in lakes, ponds, streams or rivers)

(Example: Large natural areas and variable landscapes in the Grey Section of the escarpment allow for a wide diversity of fauna in the region. Common breeding birds in the broadleaf forests of the Grey Section include the Yellow-bellied Sapsucker, Veery, Black-throated Blue Warbler and Chestnut-sided Warbler (Riley et. al., 1996). A wide range of bird life was reported in the lowland thicket in the spring although no specific species were identified. Deer tracks were observed also on the property during the summer. It would therefore seem that the development of a rural estate subdivision in the area has not frightened wildlife from the area and the property should be maintained as a natural area to maintain this phenomenon. No significant aquatic species are reported on the property.)

Cultural Heritage Feature or Area:

The provision of public access, the presence of trails, the presence of interpretive materials, and use of the site by the public, students or others, the presence of buildings (historic or not) and

other cultural features (dams, etc.).

(Example: Trail structures on this property include a boardwalk over a seasonally wet area and signage at the entrance to Scandia Road. Split rail fencing, in good condition, is found along the eastern boundary of the property following a laneway to a neighbouring house. Nine-strand wire fencing is located along part of the southern boundary and is bisecting the property between the thicket to the east and the transitional forest to the west. A "no trespassing" sign is attached to the wire fence on the southern boundary).

Regional Context and Current Land Uses:

(Example: This property is found within the Town of the Blue Mountains (formerly the Township of Collingwood) in the northeastern region of Southern Ontario. Major centres in the area include Craigleith 2-3 km to the north and Collingwood 8 km to the east. The Niagara Escarpment is located within 500 m of the property to the northeast. This part of the Niagara Escarpment is designated as the "Grey Section". A wide range of physiographic features, climates, vegetative types, flora and fauna are found in this section. Several relatively large intact natural areas also help to maintain the assortment of flora and fauna in the area (Riley et. al, 1996). Although the property is not found within the boundaries of any recognized areas of Natural and Scientific Interest (ANSI), provincially significant Crevice Caves of the Blue Mountains and Blue Mountains Moraines, Earth Science ANSIs are located directly to the south of the property and the provincially significant Blue Mountains Slopes Life Science ANSI is located to the northwest of the property. This property is situated in an area of rural estate homes close to an extensive downhill ski slope development to the northeast along the face of the Niagara Escarpment. Agricultural land is still found to the south and southeast of the property. Property west of this property remains wooded. Several residential structures are located in close proximity to the property boundaries of this property. This property is currently vacant with no hydro, telephone, water or septic services. Fire and Police protection are obtained through the Township of Collingwood and Grey County.)

Land-Use Designation:

The Official Plan for the county/region and municipality/town includes a land-use designation for the site.

(Example: This property is within the Escarpment Recreation Area of the Niagara Escarpment Plan (NEP). The NEP is a set of planning objectives and policies, which aims to strike a balance between development and preservation of the Escarpment. The Escarpment Recreation Area designation is to provide areas where new recreational and associated development can be concentrated around established, identified or proven downhill ski centres. They also provide restricted development around the core natural areas of the Escarpment. This property is not located within the boundaries of any Areas of Natural and Scientific Interest (ANSI) or provincially significant wetlands identified by the Ministry of Natural Resources. It is also not within any regionally identified Environmentally Sensitive Areas (ESA).)

Maps and Aerial Photos:

Maps and aerial photos are essential to a management plan. These can include satellite imagery, GIS maps and lot and concession maps. A map identifying different zones will delineate the boundaries for each zone (i.e. wetland, forest, etc.) and these zones will accompany the goals and objectives of the management plan.

Management Strategy

This section identifies the major items to be addressed through management recommendations (e.g. land-use conflicts, invasive species, natural disturbances, rehabilitation, visitor control, etc.). What approaches or recommendations will be taken to manage the property? This is an important section as it will guide what activities happen on the property over the next three, five, ten or twenty years. List both the short-term and long-term goals for the property. This can be done using input from the volunteer property management teams, the Board of Directors and local neighbours of the property. The types of questions to ask now are:

- Will the property be left alone as a nature reserve?
- Will the public be allowed to access the property and if so how?
- Will the site be used for education and interpretation purposes?
- How will the property be affected by outside influences?

Once the goals are set, you can start to set out some recommendations. These recommendations should have timelines. The land trust can use these timelines when volunteers undertake activities. While the purpose of a management plan is to think long-term for the site, it may be necessary to address more immediate needs. For example, a boardwalk may be recommended as an immediate activity as there is concern of degradation of the surrounding wetland if the public has access to the site, while interpretive signage might be something you could do later. Assign costs to each of the recommendations; this will help to guide the Board in setting annual budgets for their properties. Although this does not need to be included in the management plan, it could be created as a management plan budget. Once plans have been prepared, they should be approved by the Board and then shared with volunteers on management teams.

Objective	Recommendation	Timeline	Cost
#1 Education	Install interpretive signs along the trail	2006	$1,500.00
#2 Public Access	Build a trail from the entrance of the northwest corner, across the property to the southeast corner	2005	$800.00
#3 Restoration	Plant the 5 acre block at the south-end of the property with conifers	2005	tbd

The aforementioned information only touches on the need, preparation and maintenance of management planning. Use more detailed sources such as the Ontario Land Trust Alliance's Securement Manual, the Nature Conservancy of Canada's Stewardship Manual and A Conservation Planning Training Manual in helping you to prepare stewardship/management plans.

Section E: Managing Conservation Easements

E: MANAGING CONSERVATION EASEMENTS

Preparing a Baseline Report

Managing lands that you own versus those where you hold a conservation easement require separate management approaches. Baseline reports are fundamental for conservation easements as they are the tool from which a land trust will monitor the property, assess change over time and ensure the easement agreement is being withheld.

A baseline report records the condition of the property (in words and pictures) at the time of the easement registration or shortly thereafter. An individual with an ecology or biology background should prepare the baseline report. *(OLTA Baseline Documentation Checklist for Conservation Easements, Appendix L and OLTA Baseline Inventory and Determination of Landowner Conservation Goals, Appendix M)*

The baseline report outlines the specific features of the property that are being protected, why they are being protected and their current condition. It then becomes the benchmark for monitoring purposes and if necessary becomes the enforcement tool should violations occur on the easement property.

An individual with an ecology or biology background should prepare the baseline report.

The baseline report should be prepared at the same time the conservation easement agreement is prepared or shortly thereafter. You want to make sure that conditions of the property do not change between the time the easement agreement is signed and the baseline report is signed. However, baseline information should be collected when the ecological features central to the easement agreement can be observed and recorded. Both the landowner and the land trust should sign the document acknowledging that both are in agreement regarding the features of the property and the restrictions that the easement agreement places on them. It is important to use plain language so it is comprehensible by both the landowner and the person undertaking the monitoring.

The following information has been taken directly from the Ontario Heritage Foundation's document "Baseline Reporting for Natural Heritage Easements in Ontario" and includes the sections that should be included in a baseline document.

- Reference statement
- Executive Summary
- Property Location
- Landowner Information
- Easement Summary
- Property Information
- Acknowledgement of Condition Statement

Reference Statement – The baseline report should begin with a statement referencing the easement agreement and reinforcing that agreement as the overriding document in the cases of inconsistencies. A sample statement would be:

"This Baseline Report is ancillary to the easement agreement between John and Linda Bright and the Ontario Conservation Organization dated October 5, 1996 and registered as No. 12345678 at the Registry Division of Smallville. In cases where there is a difference between this baseline report and that easement document, the easement will take precedence.

Executive Summary – This section gives the reader a good overview of the site and the easement agreement in just one or two pages. This summary should include the name of the landowner and the location of the property as well as a brief overview of the natural features on the property and the particulars of the easement agreement.

Property Location – This section should give the address of the landowner along with the lot and concession numbers on the property and directions to the site. You may also want to include one or two maps showing the regional and provincial setting of the property.

Landowner Information – This includes the name and contact information of the current landowner. It should also indicate whether the landowner lives on the site.

Easement Summary – A summary of the easement agreement will help to tie the baseline report to the agreement and ensure that the two documents support one another. The summary will also act as an important reminder to the landowner of what is expected of him or her. It should refer to where full copies of all legal documents can be found.

Property Information – This section will describe the natural features of the property, why they are important and their current condition. All the physical data is recorded here: descriptions, measurements, and sketches of all pertinent ecological, agricultural, scenic and human-made features on the property. Do not to use technical language in this section, describe the important natural features in a straight forward, easy to understand format.

- Aerial Photos – From an enforcement standpoint, aerial photos, topographical maps, and base maps are only accurate as of the date they were produced. Any changes, which have taken place on the property since that time, must be noted if they are to be of any use in proving violations

- Natural Features Maps – These maps locate various natural features on the property. There are several different methods for preparing natural features maps. You may prefer to trace the natural features directly onto a hand-drawn sketch, an NTS map, an OMB, and aerial photo or some other sketch of the property or you may prefer to trace them onto a Mylar overlay, which is placed on top of one of these maps. When preparing these maps, it is important to remember that the information should be somewhat quantifiable. For example, when indicating location of a significant woodlot, you should also indicate its dimensions and distance from any potential threats. The distance between the forest and the road is measured and recorded so that, if the landowner encroaches on the forest by expanding his/her backyard, you will be able to prove it using the map.
- Significant Area Boundaries – These are widely recognized categories of significant natural areas include Areas of Natural and Scientific Interest (ANSIs), Class 1-3 wetlands and Environmentally Sensitive Areas (ESAs). Show the natural features on the map and describe them in the text of the baseline report.

- Vegetation Communities or Habitat Types – Show vegetation or habitat types on the natural features map and describe them in the text. The particulars of the easement agreement will dictate how elaborate this information has to be. For example, if the easement simply restricts the cutting of trees, all you will need to show on the map would be the location and extent of any woodlots. However, if the easement restricts the alteration of habitat, you will need to break this down further and show the various vegetation communities that are present.

- Water: Streams, Rivers, Ponds and Shorelines – Documenting these features can be important if the feature the easement is meant to protect includes wetlands or important trout streams. Note the direction of the water flow in order to identify where potential impacts may originate. Record the pattern of streams and creeks and the shapes and locations of ponds and wetlands so that dredging and channelization can be monitored.

- Special Natural Features – A variety of other "special" natural features may also be shown on the natural features map. Of particular interest is the occurrence of rare or unusual flora and fauna, the significance of these species (i.e. provincially or regionally rare, threatened, or endangered) and their habitat requirements and/or ecosystem functions should be noted. Other types of information that should be noted include rock outcrops, springs and seepage areas, hills and crevices, scenic views and any features considered unusual.

- Cultural Features – This includes the location of buildings, roads, trails, fences, access points, wells and other human-made features. Show these on your natural features map and describe them in the text. Any obvious human impacts such as recent logging, brush clearing or cattle watering in creeks should also be recorded.

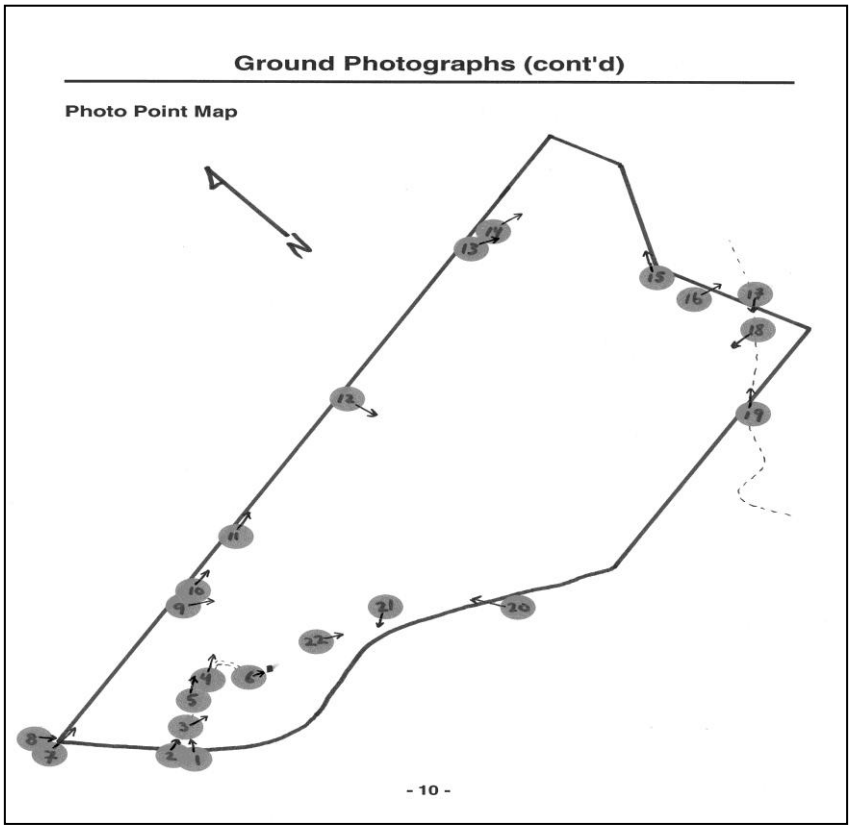
- Information Related to Easement Restrictions – Any information that is necessary to define the restrictions in the easement agreement should be shown on the natural features map and described in the text. This information should be measurable and avoid the use of subjective language.

Ground Photographs – These photos can be used as evidence of violations and to indicate points of interest. The particulars of the easement agreement should also be photographed. For example, most easement agreements prohibit building on the site so all existing built structures such as barns, sheds, roads and wells should be documented with photographs. Those features which contribute to the significance of the property and the easement's boundaries should be documented with photographs as well. Lastly, make sure that all vulnerable features, such as the edge of a woodlot, are photographed.

Other Information – There may be other information that should be included such as a municipal planning designation or zoning by-law. Some sites may have management plans prepared for them; these should be referenced in the report. Other site information that you may not want to include in the report but instead keep in the baseline file includes: describing neighbouring land uses, nearby subdivisions (as they may pose threats of encroachment), adjacent pasture which may raise the potential for cattle entering a woodlot and destroying vegetation. If a stream runs through the property, upstream land uses might be noted.

Acknowledgement of Condition Statement – This is the final section of the baseline report. This section ensures the landowner has read the report and that there is a common understanding between the land trust and the landowner as to the features on the property and how the easement agreement applies to them. By having both parties sign it, the statement will reinforce the idea that yours is a cooperative one, rather than regulatory.

A critical section of the Baseline Report is the photographs and their reference points. These photos should reflect the significant habitat types or features that are being protected through the easement. A description of what each photo represents should also be provided. It is this information that the individuals monitoring your conservation easements will use as reference points to determine whether violations have occurred. Below is an example provided by the Ontario Heritage Foundation.



Ground Photographs (cont'd)

Photo 7: The NW corner of the property

Photo 8: The old road alignment in the vicinity of the driveway

Ground Photographs

The colour photographs for this baseline report were taken during a site visit on July 7th, 2000 by Simeon Stairs of the Ontario Heritage Foundation. The black and white photographs were taken during a site visit by Foundation staff on December 4th, 1991, and have been used here to show the built features of the property, which have remained essentially unchanged since 1991. All azimuth readings have been corrected for true north (2000 declination ~9°).

Table Describing Ground Photographs

Photo Number	Photographer's Location	Azimuth	Purpose
1	On Road 9, at the end of the driveway.	25°	To show the general conditions along the driveway. Note that the driveway is regularly mowed, but that the surrounding areas are left in an essentially natural condition.
2	On the driveway, approximately 20 m in from the new Road 9 alignment.	48°	To show the general conditions along the driveway. Note the freestanding chimney and garage beyond it.
3	On the driveway, about 70m in from the new Road 9 alignment.	120°	To show the garage and its natural surroundings.
4	On the driveway, about 100m in from the new Road 9 alignment.	50°	To show the relatively undisturbed conditions along the driveway and in the vicinity of the storage shed. There is a small mowed clearing beside the shed, and an old track veers off to the NE from it towards the old scrap pile along the N property line.
5	On the driveway, about 85m in from the new Road 9 alignment.	19°	To show the privy and storage shed, and their relatively undisturbed surroundings.
6	At the end of the driveway by the cottage.	88°	To show the cottage and its relatively undisturbed surroundings. Note the steep rock ridge behind the cottage.
7	On the W side of Road 9.	81°	To show conditions at the NW corner of the property. Note the difference in understory structure between the easement lands to the right of the fence and the neighbour's pasture to the left.

Courtesy of Ontario Heritage Foundation (OHF)

Ontario Heritage Foundation's document, "Property Information Required for the Baseline Report", taken from Baseline Reporting for Natural Heritage Easements in Ontario, is helpful in identifying the type of information that could be included in the report. *(OHF Property Information Required for the Baseline Report, Appendix N and OHF Baseline Inventory, Appendix O)*

Monitoring Conservation Easements

Training volunteers to monitor conservation easements is somewhat more complex. Not only do the volunteers have to be trained on monitoring a property but they must also be able to understand the contents of the easement agreement including the restrictive covenants. They must be able to refer to the baseline report, which was prepared for the property, and use it to determine if any violations have occurred. If possible, a staff person, dedicated Board member or long-term volunteer should be assigned to monitor easements. Ideally, if a small team of monitors can be assigned to specific easement properties on a long term basis, the resulting continuity will provide more credible records than if monitors change repeatedly. It is also important that the team leader have a strong connection with the Board member who should bring forward any violations to the Board for rectification. Again, as best as possible, it should be the same person or team of people who should monitor the easement at least once a year. Consistency is essential in documenting any changes, either positive or negative, over time.

Prior to monitoring a conservation easement, the owner(s) of the land should be notified of the visit as per the terms of the conservation easement. The landowner(s) should then be notified again, at least 24 hours in advance of the monitoring date and asked whether they want to be present during the site visit. The team should also bring the following to the site visit:

- Base map
- Aerial photo
- Baseline documentation report (photocopy for field)
- Camera and film
- Field guides

It is important that your Conservation Easement Annual Stewardship Monitoring Report include a pre-checklist section. This reminds the monitor to review all previous monitoring forms and discussions with the landowner.
(OLTA Annual Stewardship Monitoring Report for Conservation Easements, Appendix P)

Violations

Reporting and addressing a violation is never an easy task, however, by maintaining good relations with your landowners you can usually avoid violations in the first place. If a violation is noted, the following steps should be taken to deal with the problem before it becomes more severe. Most importantly, ensure that the violation is properly documented. This can be done through photographs, measurements, and mapping of the location of the violation. The volunteer who found the problem should then prepare a report for the Executive Director or Chairman of the Board. Volunteers should not confront the landowner with the violation.

Volunteers should not confront the landowner with the violation.

The Executive Director or President, in collaboration with other Board members shall determine whether a violation has occurred. Only after it has been determined that a violation has occurred should the landowner be contacted. The Executive Director or Chairman will then forward a letter to the landowner requesting written details of the occurrence. Once this information has been received, the land trust can determine the severity of the violation and

what measures will be taken to address the violation. Of importance to note is the fact that the role of the volunteer is to bring the violation to the attention of the land trust Board, not to enforce the easement provisions.

Permission to Undertake Certain Activities

Sometimes when visiting a conservation easement property with the landowner, the landowner may ask permission to carry out a certain activity. If there is any uncertainty about whether the activity is permitted, a volunteer should not provide a response but rather advise the landowner that a formal letter should be written. For example, the easement may specify that some activities require the prior approval of the land trust. The Board should then make the decision, with assistance from the people monitoring the property, as to whether or not the activity is allowed. For example, a landowner may note that several of his/her trees are dying. Their conservation easement agreement states that cutting of trees is not acceptable unless the trees are felled for safety or disease reasons. Even though their easement agreement allows for cutting of diseased trees, this information should still be reported and both written approval and photographic documentation should be undertaken. You want to ensure that all future people associated with the file and monitoring the property do not accuse the landowner of violating the easement agreement, if in fact, approval was given to undertake a certain activity.

When a property holding a conservation easement is sold, the land trust should notify the new owners of the terms and conditions of the conservation easement agreement. Appendix Q gives an example of a letter prepared by the Land Trust Alliance (LTA). *(LTA New Conserved Property Owner Letter, Appendix Q)*

Summary

SUMMARY

No matter what types of programs are pursued, the strongest land trusts will be those that delegate responsibility to communities and individual volunteers. Increasing the knowledge and capacity of volunteer monitoring groups in the province is important given Ontario's current political climate and provincial budgetary cuts. Fostering volunteer leadership and broadening participation in land conservation is an essential part of a successful land trust.

Appendices

APPENDIX A

VOLUNTEER APPLICATION FORM

All information gathered on this form is for the _____'s records and statistics only and will be held in confidence. If you will not be volunteering with us this form will be destroyed.

Today's Date: _____

Name: _____
Last Name Given Name(s)

Address: _____

Telephone #: _____ **Email:** _____

Where did you hear about the _____ Land Trust? _____

Why do you wish to volunteer? _____

Please indicate the area of volunteering you are interested in:

☐ Education and Community Outreach ☐ Fundraising

☐ Land Monitoring ☐ Special Events

Please list your work skills and training as related to this position: _____
_____
_____
_____

Please note any previous volunteer experience: _____
_____
_____

Do you have access to a vehicle? Yes ☐ No ☐

Scheduling and Availability

1. **Indicate the day(s) of the week you would be available to volunteer?**
   Mon. ☐ Tues. ☐ Wed. ☐ Thurs. ☐ Fri. ☐ Sat. ☐ Sun. ☐
2. **Indicate time preference:** days ☐ evenings ☐ weekends ☐
3. **Indicate amount of time you wish to donate:** ____ hours or ____ days per: week ☐ month ☐
4. **Do you currently:** have a full-time position ☐ have a part-time position ☐ go to school ☐
5. **Do you wish to finish volunteering by a certain date?** Yes ☐ Please indicate date _____No ☐
6. **Would you like to receive ___newsletters and event notices?** Yes ☐ by e-mail only ☐ No ☐
7. **Would you like to receive volunteer information via e-mail?** Yes ☐ No ☐
8. **Do you require volunteer hours?** Name of Program _____
   Number of hours required _____ Deadline _____
9. **Do you know any _____ staff or volunteers?** Yes ☐ No ☐
   If yes, please list name(s) _____
10. **Will you be willing to participate in a police reference check, if required?** Yes ☐ No ☐

Character References

Please list **two** character references (family members not included)

All of the information will remain confidential and only used for volunteer selection and placement.

Name: ____
Relationship to Applicant: ______________________ Phone No.: ____________________________
Name: ____
Relationship to Applicant: ______________________ Phone No.: ____________________________
I hereby give the ________ authority to contact the above-named persons as character references.

I hereby declare that the foregoing information is true and complete. I understand that a false statement may disqualify me from volunteering with ____________________________________, or cause my dismissal.

______________________________ ________________________
Volunteer's Signature (if 18 yrs. or older); Date

~~~~~~

In accordance with our Policy, the minimum age requirement of a volunteer with the _______________________ Land Trust is eighteen (18) years, with the following exception:

• *Volunteers aged twelve (12) to seventeen (17) years must have a signed Consent form from a parent or guardian; to be completed and submitted with the Statement of Confidentiality Agreement.*

Consent Form (to be completed as applicable)

I, the undersigned, have read and understand the ________________________________'s policy regarding volunteers under the age of eighteen (18) years. I certify that I have parental or guardianship status regarding the above named volunteer and do hereby give consent for him/her to perform volunteer work with, for and on behalf of ____________________________.

Signature of Volunteer: _______________________________________ Date: _______________

Signature of Parent/Guardian: _________________________________ Date: _______________
(As applicable)

Nature of Relationship to Volunteer: ____

~~~~~~

We thank you for your interest in volunteering with the _________________________. Staff will contact you if you are selected to fill a vacant volunteer position. All applications will be kept on file for a minimum of one year from the date of submission. Applicants will also be placed on an e-mail notification list (if you selected the option), and will be informed of upcoming volunteer opportunities as they arise.

Check out our website at www.olta.org.

Appendix B

3.4 ACCESS TO PROPERTY WAIVER and TIPS FOR VISITORS

UNSUPERVISED VISITOR
ACKNOWLEDGEMENT, WAIVER AND RELEASE

Your Name: _____

Address: _____

Phone #: _____

Type of Activity/Access: _____
(e.g., pedestrian access for jogging)

Nature Conservancy of Canada Property: _____
(e.g., Robert Goulding Natural Area, Mono Township)

Dates: _____

To: The Nature Conservancy of Canada:

I understand that during my activities on the Nature Conservancy of Canada (NCC) property I may encounter certain dangers, including, but not limited to, the kinds described in the attached "Tips for Visitors". I agree that I am accessing the property entirely at my own risk. I acknowledge that NCC makes no representation or warranty, express, or implied verbally or otherwise, regarding the conditions that may be encountered during the visits, and that NCC is in no way responsible for my safety.

In consideration of NCC permitting me to have access to the property, I hereby assume all risk associated with my visits to the property, and I release and agree to indemnify, defend and hold NCC and its directors, officers, employees, associates, volunteers and agents harmless from and against any and all damages, losses or injuries due to any reason whatsoever associated with my visits.

I further acknowledge that: permission to access the property is personal to me alone and I have no authority to invite others onto the property and permission to access the property may be revoked by NCC at anytime, with or without notice.

Signed: _____ Date: _____

TIPS FOR VISITORS

Tips for Visiting Nature Conservancy of Canada Sites (part of the "Access to Property Waiver"):

- You may be walking on terrain that may be steep, uneven, slippery, or jagged, or where solid footing is obscured by vegetation. Be sure to have good walking shoes with appropriate ankle support and treads.

- You will be enjoying the outdoors in all kinds of weather, from bright sun to rainy conditions. Bring sunscreen, preferably waterproof with a high protection factor, and apply it frequently. Bring rain gear. Wear layers of clothing that will allow you to adjust your temperature during the course of the day.

- Black flies/mosquitoes and other biting/stinging insects may pose a problem at certain times of the year.

- Even with appropriate precautions, accidents can happen. NCC does not provide any trained medical professionals nor any hazard-or emergency-evacuation facilities. First aid kits are recommended.

- Since you will be visiting rich natural areas, you will encounter many types of plants and animals, on land and in the water, some of which may be dangerous or poisonous to humans. It is your responsibility to learn about the environment you'll be visiting, and how to avoid natural threats.

- You must help keep these areas beautiful by packing out everything you bring in, including garbage.

- Many of the habitats on NCC property are ecologically sensitive, be aware of your impact, do not pick flowers, avoid crushing plants and do not feed or harass wildlife.

- Fires of any sort are absolutely prohibited on NCC property.

- These tips are part of the "Access to Property Waiver". You must sign it and return it to the NCC before you visit NCC properties.

APPENDIX C
WAIVER OF LIABILITY FOR VOLUNTEERS

I, _____hereby agree to accept a position as a volunteer worker
Name of Volunteer

with the _____, and in so doing agree to comply with all policies,
Name of Organization

rules and regulations, which may be established by the_____
Name of Organization

from time to time. I also understand that failure to comply with said policies, rules and regulations may result in my immediate release as a volunteer.

I acknowledge that my services are provided strictly on a volunteer basis, without payment or compensation of any kind and without liability of any nature on behalf of the _____.
Name of Organization

I affirm that I am in good health, capable of participating in _____
Description of Activity

and I accept as my personal risk the consequences of such participation. I also understand that I may refuse to perform any duty or task that I feel may place me or anyone else at personal risk. I will not participate in this activity if I am under the influence of drugs or alcohol.

I understand that in performing any volunteer task, there exist risks of injury or personal harm. On behalf of myself, my heirs, personal representatives or executors, I hereby release, discharge, indemnify and hold harmless the _____ (including its volunteers,
Name of Organization

directors, employees and agents) from any and all claims, causes of action or demands of any nature or cause, even though such injuries and damages may result from the negligence of the _____ and/or
Organization's initials

its volunteers, directors, employees and agents; including costs and attorney fees incurred or sustained by me in any way connected with my services for the _____, including but not limited to accidents or
Organization's initials

injuries.

In the event of an accident or medical problem suffered by me, I consent to the _____ seeking out
Organizations' initials

the appropriate medical care required.

I also understand that public relations are an important part of the work of the _____. On behalf of
Organization's initials

myself, my heirs, personal representatives and executors, I agree to allow the _____ to use any
Organization's initials

photographs, films, videotapes or other visual representations taken of me in my volunteer services as aids in public relations efforts.

CONFIDENTIALITY

As a volunteer, you are bound to encounter not only unique experiences, but also exclusive _____ information.
Name of Organization

In keeping with the intent of the _____Privacy and Security
Name of Organization

Policies, the Volunteer/Employee acknowledges that all information to which the Volunteer/Employee has or may have access to through his/her volunteer activity or employment with the _____
Name of Organization

is confidential and is held by the Volunteer/Employee solely for the benefit of the _____and its supporters. The Volunteer/
Name of Organization

Employee agrees that he/she shall not, except as authorized or required by his/her duties, reveal to any person or corporation, any confidential information of the _____.
Name of Organization

For this reason, we stress the importance of respecting confidentiality. Failure to comply with this request will result in legal action against the volunteer and/or the organization and result in ending your volunteer services.
If you have any questions or concerns, refer to our Privacy and Security Policies.

I, _____ have read the policies and waivers listed above and understand their content.

DATE: _____

NAME: _____
(Please print)

SIGNATURE OF VOLUNTEER: _____

SIGNATURE OF GUARDIAN: _____
(Required if volunteer is under the age of 18 years)

SIGNATURE OF _____ EMPLOYEE: _____
Organization's initials

APPENDIX D

INCIDENT REPORT

Injured Person Report:

Name of Injured Person: _____ Tel. #: _____

Address: _____

Incident Date: _____ Time: _____

Place: _____

Nature of incident: _____

Weather conditions: _____

People present: _____

_____

_____

Signature of Injured Person

Witness Report:

Name: _____ Tel. #: _____

Address: _____

Name of Injured Person: _____

Incident Date: _____ Time: _____

Place: _____

Nature of incident: _____

++Weather conditions: _____

People present: _____

_____

Date: _____ _____

Signature of Witness

Report prepared by: *(Please print)* _____

Description of Injury: _____

Action(s) taken to provide care: _____

_____

_____

_____

Date: _____ _____

Signature of Incident Reporter

APPENDIX E

March 23, 2004.

Dear Conservancy Volunteer:

My thanks to those of you who returned our volunteer survey - it has provided very useful information to help focus our training sessions this year.
As a result, we are setting up two training sessions: WEDNESDAY, APRIL 21, 6:30 TO 9:00 P.M., and SATURDAY, APRIL 24, 9:30 TO 12:00 A.M. Both sessions will be here at Grant's Woods, 1485 Division Road West. Both will cover the same ground - please let me know which one you would like to attend since space is limited.

Your feedback gave a very even split on preferences between Saturdays, Sundays, or weekday evenings. I expect we will set up a bus tour of some of our properties in June, and we will try to schedule it on a Sunday to round things out.

You also told us that you wanted information especially on plant and wildlife identification, wildlife enhancement techniques, and finding out what other teams are doing. For the April sessions, we will focus on spring wildflowers and on herptiles - i.e. the reptiles and amphibians that you might see on our properties.

We will cover spring frog songs, the more common turtles and snakes, and sampling boards you can make to check for salamanders (which are the most common wildlife, by total weight, in most forests). We will have handouts and info for you, and we will brief you on some of our other exciting projects as well.

This training is being supported by a grant from the Orillia chapter of the TD Canada Trust Friends of the Environment Fund, so our thanks to them.

I look forward to seeing you at one of these sessions - please don't forget to let me know which one you plan to attend. (And if you have email, please let me know your address - it saves us postage costs.)

Think spring!

Ron Reid
Executive Director

April 7, 2003.

Dear Conservancy Volunteer:

Happy Spring! As the snow finally melts away, I'm sure you are thinking about spending a few hours on your spring visit to a Conservancy property, or to helping with other projects such as the Grant House renovations. We greatly appreciate your support and your commitment. Without you, the Conservancy could not be nearly as successful.

I am writing for several reasons:
First, we want to invite you on a special property tour for our volunteers in late May. We plan to visit the McCulloch (Carthew Bay) Reserve, the new East Coulson Swamp property on the Oro Moraine, and Grant's Woods (for a walk in the forest, not for house-cleaning!). We will be asking those property teams to share some of their experiences and challenges, and giving you a chance to brush up on your plant and bird identification skills. If numbers warrant, we will rent a bus to make the tour both relaxing and environmentally-friendly.

Could you let me know:
a) Are you interested in coming on such a tour? Yes _____ No _____
b) Which date would suit you best?
Sun. May 25 1:00-5:00 _____Sat. May 31 1:00-5:00 _____
c) Would you be willing to pay $10 for bus transportation? Yes _____ No_____

Second, we would like to include as many of our volunteers as possible on an e-mail list, so that we can occasionally let you know about Conservancy news and events. If you have email, please simply respond to the above questions to me at Thanks.

Third, if you are not already a member of the Conservancy, or if your membership has expired, I have enclosed the latest issue of Conservancy News along with a renewal form. We greatly appreciate your contribution as a volunteer. However, our members are a very important base for the revenues that sustain our activities, and we hope that all of our volunteers will also be willing to show their commitment through their annual membership fees.

Thanks again for your support. I look forward to hearing back from you, and to seeing you on the tour in late May.

Sincerely,

Ron Reid
Executive Director

APPENDIX F

SITE INSPECTION REPORT

SITE NAME: _____

DATE OF SITE VISIT:

Season	Date
Spring	
Summer	
Fall	
Winter	

NAME OF SITE INSPECTOR(S):

1. **MAP**

2. RECREATIONAL USES (Required)

The following activities have been approved by the Ontario Land Trust Alliance as either allowed or prohibited. Please check off those activities observed and provide a brief description. (These observations should be indicated on the map of the preceding page).

Activity	Allowed	Prohibited	Notes
Formal Trails	□	□	_____
Informal Trails	□	□	_____
Hiking	□	□	_____
Berry picking	□	□	_____
Nature appreciation	□	□	_____
Bird watching	□	□	_____
Photography	□	□	_____
Picnicking	□	□	_____
Swimming	□	□	_____
Camping	□	□	_____
Boating	□	□	_____
Cycling	□	□	_____
Rock climbing	□	□	_____
Cross-country skiing	□	□	_____
Skating	□	□	_____
Snowshoeing	□	□	_____
Snowmobiling	□	□	_____
Trapping	□	□	_____
Dog walking/training	□	□	_____
Equestrian Use	□	□	_____
Angling	□	□	_____
Hunting	□	□	_____
Bus tours	□	□	_____
Motorized vehicles	□	□	_____
Other (please specify)	□	□	_____

Additional Notes: _____

_____

_____

_____

3. HAZARDS (Required)

(These observations should be noted on the map – Page 2 of this Report)

bears	☐	rattlesnakes	☐	poison ivy	☐
tree snags	☐	old wells	☐		
other (describe)	☐	_____			

_____

_____

_____

4. NATURAL DISTURBANCES (Required)

(These observations should be noted on the map – Page 2 of this Report)

beaver dam(s)	☐	erosion	☐	fire	☐
flooding	☐	siltation	☐	heavy browsing	☐
wind falls	☐			non-indigenous species	☐

other (describe)_____

_____

_____

_____

5. HUMAN DISTURBANCES (Required)

(These observations should be located on the map – Page 2 of this Report)

camping	☐	informal shelters	☐	rock climbing	☐
horseback riding	☐	mountain bikes	☐	pets	☐
stray animals	☐	feeding wildlife	☐	plant harvesting	☐
trampling	☐	herbicides	☐	pesticides	☐
litter	☐	dumping	☐	fires	☐
trespassing	☐	fence damage	☐	vandalism	☐
sign damage	☐	motorized vehicles	☐	mountain bikes	☐
road widening	☐	ditching	☐	cleaning municipal drains	☐
urban runoff	☐	poaching	☐	trapping	☐
logging	☐	timber theft	☐	unauthorized uses	☐
other (specify)	☐	_____			

_____

_____

_____

_____

_____

6. Flora and Fauna Observations (Optional)

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

B) Vegetation (trees, shrubs, plants)

7. WILDLIFE HABITAT FEATURES (Optional)

Locate on the map any unique or significant wildlife habitat features. Examples: snags/cavity trees, fallen trees, confer thickets, brush piles, waterfowl nesting, waterfowl feeding, dens, nests, wildlife trails, etc.

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

8. CONTACTS WITH NEIGHBOURS OR VISITORS (Optional)

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

_____

_____

_____

_____

_____

_____

_____

_____

9. NOTES

(Provide any other relevant information obtained during site visit)

_____

_____

_____

_____

10. RECOMMENDATIONS

WHAT	LEVEL OF URGENCY When does the issue need to be dealt with?	# OF VOLUNTEERS NEEDED & WHO	EQUIPMENT NEEDED	COST	ACTIVITY COMPLETED
e.g. fencing – fence 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 + 3 volunteers)*	*Posts* *Hole digger*	*$500*	

APPENDIX G

MONITORING REPORT

Site Name: _____

Date of Site Visit: _____

Names of Site Inspectors:_____
_____
_____

Sections of Property Visited: _____
_____
_____
_____

Hazards Observed: Yes ☐ No ☐
If Yes, please describe: _____
_____
_____
_____

Natural or Human Disturbances Observed: Yes ☐ No ☐
If Yes, please describe: _____
_____
_____
_____

Notable Flora and Fauna: _____
_____
_____
_____

Contacts with Neighbours or Visitors: _____
_____
_____
_____

Follow-up Needed on any Issues: Yes ☐ No ☐
If Yes, please describe:
_____
_____
_____
_____

Please use additional sheets if needed for further details, and mark any hazards, disturbances or significant features on a sketch map.

APPENDIX H

IIIE 2.0 MONITORING REPORT FORM

Version 1, December 2000 (Individual NCC Regions may have more detailed forms.)

Date:_____

Property Monitored by:_____

Property Name:_____

Easement Donor's Name and Address:_____

Last Site Inspection:_____

Baseline Documentation Report/ Site Summary Statement Reviewed	Yes__ No__
Air Photo Reviewed	Yes__ No__
Owner Notified of Visit	Yes__ No__
New Photographs Taken and Location	Yes__ No__
Sketch of Route	Yes__ No__
Compliance with Restrictions	Yes__ No__
Compliance with NCC's Management Policies	Yes__ No__

Areas of Concern:_____

Possible Problems:_____

Immediate Action Required:_____

APPENDIX I

Protected Area – Site Inspection Report

Site Name:_____ Insp. Date:_____

Steward:_____ Insp. No.:_____

Name and Club/Group/Association Name

Volunteer Phone No. Signature:_____

No Change in Site Conditions Since Last Inspection: (If there are no changes in teh condition of the Protectd Area, or no new information on disturbances, uses and wildlife since your last visit, check "No Change" Remember to submit a disturbance map, if required, to show the location of any item noted.

A. Disturbances: (Check all disturbances that have occurred, or are still occurring, since the last inspection.)

Vegetation/Animals	Soil Removal	Vandalism	New Trails/Clearing
Tree Cutting	Sand	Garbage	All Terrain Vehicles
Bark Stripping	Gravel	Signs	Four-Wheel Drive
Collecting/Trapping	Peat	Cut Fences	Hiking/Equestrian
Fire			Cutlines/Seismic
Poaching	Other	Other	Fencelines/Pipelines Powerlines/Welllines

Comments on Disturbances:_____

_____

B: Uses: (check all that have occurred, or are still occurring since the last inspection.)

ATVing	Fishing	Snowmobiling	Berry Picking
Four-Wheel Driving	Trail Riding (horse)	Bird-Watching	Hiking
Camping	Hunting	Cross-country Skiing	Picnicking
Cattle Grazing	Horse Grazing	Other:	

Comments on Uses:_____

_____

Biological Notes_____

_____

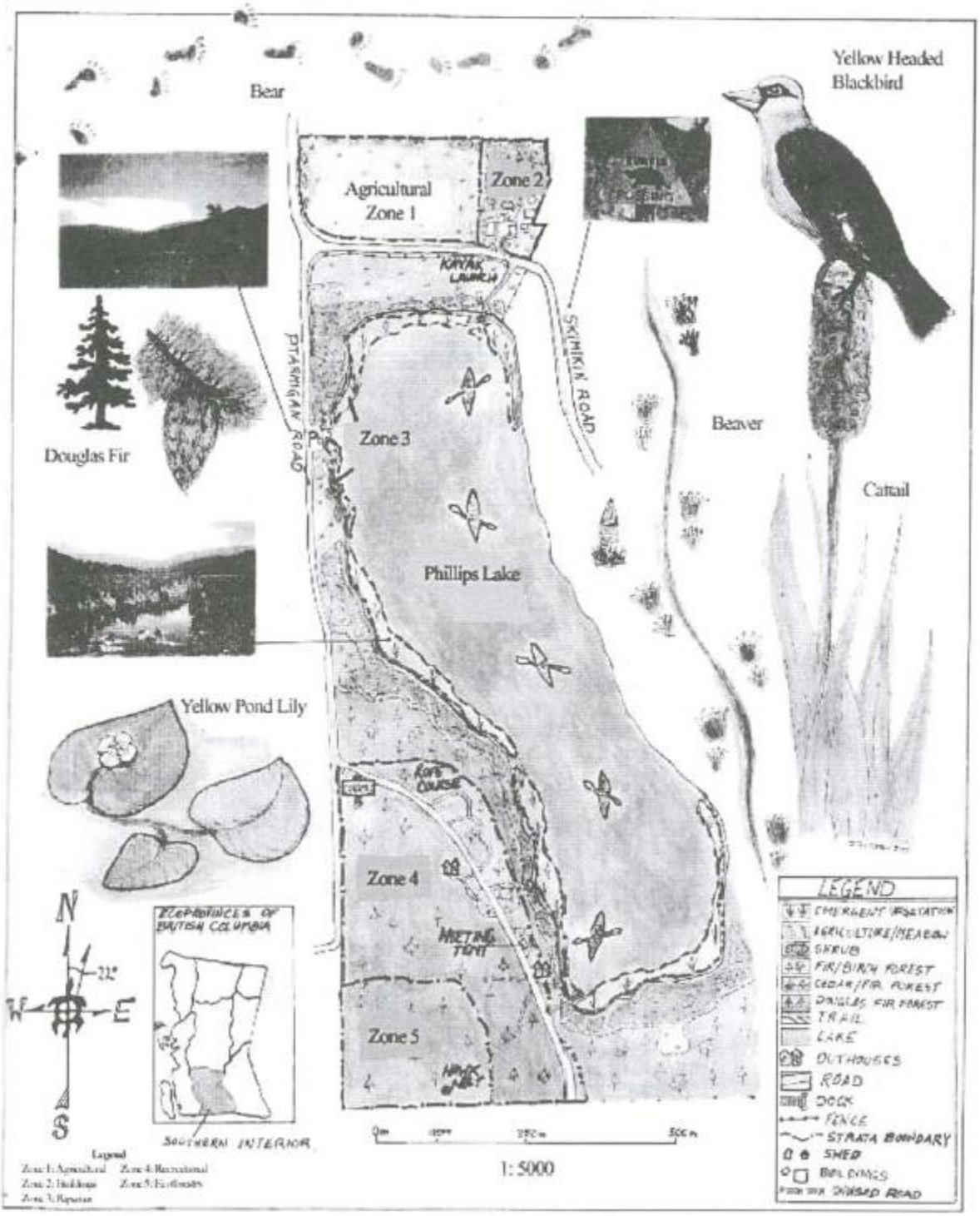
_____

Action Recommended: Projects Completed:

Reclamation	Materials/Supp[lies		Since Last Insp.
Fencing	Signs	Film	Signs Installed
Cleanup	Posts	Maps	Fencing
Revegetation	Fence Wire	Other	Cleanup
None	Insp. Reports		Weed Control

Comments on Action Recommended/Projects Completed & Summary_____

_____


Bear
Yellow Headed Blackbird
Agricultural Zone 1
Zone 2
KAYAK LAUNCH
PTARMIGAN ROAD
SKIMIKIN ROAD
Zone 3
Beaver
Douglas Fir
Cattail
Phillips Lake
Yellow Pond Lily
KAYAK COURSE
Zone 4
MEETING TENT
Zone 5
N
W
E
S
22°
PROVINCES OF BRITISH COLUMBIA
SOUTHERN INTERIOR
0m
250m
500m
1: 5000
LEGEND
EMERGENT VEGETATION
AGRICULTURE/MEADOW
SHRUB
FIR/BIRCH FOREST
CEDAR/FIR FOREST
DOUGLAS FIR FOREST
TRAIL
LAKE
OUTHOUSES
ROAD
DOCK
FENCE
STRATA BOUNDARY
SHED
BUILDINGS
DIRT ROAD

Legend for Disturbance Maps

APPENDIX J

Protected Area – Site Inspection Report

Site Name: _____Date: _____
Steward: _____Inspection No.: _____
Volunteer: _____ Phone No.: _____Signature: _____

No Change in Site Conditions Since Last Inspection: (If there are no changes in the condition of the Protected Area, or no new information on disturbances, uses and wildlife since your last visit, check "No Change".
Remember to submit a disturbance map, if required, to show the location of any disturbance noted.

Disturbances: (Check all disturbances that have occurred, or are still occurring, since the last inspection).

	√		√		√		√
Vegetation/Animals		**Soil Removal**		**Vandalism**		**New Trails/Clearing**	
Tree Cutting		Sand		Garbage		All Terrain Vehicles	
Bark Stripping		Gravel		Signs		Four-Wheel Drive	
Collecting/Trapping		Peat		Cut Fences		Hiking/Equestrian	
Fire		Other:		Other:		Cut lines/Seismic	
Poaching						Fence lines / Pipelines	
						Power lines / Well lines	

Comments on Disturbances: _____
_____

Uses: (Check all that have occurred, or are still occurring since the last inspection).

	√		√		√		√
ATVing		Fishing		Snowmobiling		Berry Picking	
Four-Wheel Driving		Trail Riding (horse)		Bird-watching		Hiking	
Camping		Hunting		Cross-country skiing		Picnicking	
Cattle Grazing		Horse Grazing		Other:			

Comments on Uses: _____
_____
_____

Biological Notes: _____
_____
_____

Action Recommended: (Check all that apply).

	√		√		√		
Reclamation		Material/Supplies				Since Last Inspection	
Fencing		Signs		Film		Signs Installed	
Clean up		Posts		Maps		Fencing	
Re-vegetation		Fence Wire		Other		Clean up	
None		Inspection Reports				Weed Control	

Comments on Action Recommended/Projects Completed & Summary: _____

APPENDIX K

Land Trust Alliance—Trust for Land Restoration
Record Keeping Policy

Preamble: The Trust for Land Restoration is committed to operating in an efficient manner, while preserving its rights to enforce the conservation easement it accepts. In addition to accepting conservation easements, TLR works to restore and remediate lands damaged by human activities. Such restoration and remediation work requires adequate record-keeping over potentially long periods of time. Therefore, TLR's record-keeping policy shall serve to guide staff in preserving those records necessary to document and guide the organization's activities in all of its programs

Records Creation: In order to confirm the accuracy of the document, all TLR records must be signed by the party creating such records. No TLR staff member, Board member, volunteer or contract employee shall sign a record as accurate unless she or he created the document themselves.

Critical Records: The following list of records shall be kept by TLR in the ordinary course of business, immediately following creation of such records, but the list is not a comprehensive list of such records:

- Correspondence with landowners, both written and electronic
- Correspondence with federal state or local governmental agencies or development authorities
- Recorded original conservation easements, warranty deeds, water rights, subordination agreements, loan documents and the like
- Appraisals
- Surveys
- Baseline documentation
- Title commitments and exceptions to title, title policies, Ownership and Encumbrance reports
- Due diligence findings
- Environmental assessments and any supporting records or date
- Reserved rights requests and responses
- Request for amendments and responses
- Correspondence and memos relating to alleged or actual violations of conservation easements
- Remediation plans
- Foundation/government grant agreements
- Scoping studies
- Contracts and all related correspondence
- Insurance policies and all related correspondence

Electronic Mail Records: Paper copies shall be made of all electronic TLR records and stored with other critical organizational records. Alternatively, TLR may record such electronic documents on floppy disc, CD-ROM, ZIP discs or other format, so long as the technology to retrieve such electronic documents is preserved as well.

Custodian of Records: The Executive Director shall be the custodian of records. The ED shall adopt a system of record sign-out and use in the event that TLR hires additional staff or makes any of its original records available to Board members or other volunteers or contract employees. Prior to such time, the ED shall not release original documents unless pursuant to a violation issue, but may freely copy records as necessary.

Record Storage: All TLR records shall be kept on-premises in fire safe storage in order to prevent any inadvertent loss of the records and avoid any possibility of tampering with the records. Such records shall be kept in paper form, but may be archived or otherwise electronically stored in the future. Should methods of record-keeping other than through paper be adopted, TLR shall also store the technology needed to access such records, so that the records can be retrieved in perpetuity.

APPENDIX L
Baseline Documentation Checklist for Conservation Easements

- ☐ Cover Page showing agreement - signatures of donor, recipient, and study
- ☐ Table of Contents
- ☐ Owner Acknowledgement of Condition

**** indicates a component which is not required for all baseline studies; it is relevant only to a particular project***

Background Information:

- ☐ Owner's/s' and land trust's contact information: name, address, phone #
- ☐ Historical information regarding the donation/acquisition
- ☐ ***** Summary of easement provisions
- ☐ Purpose of Easement
- ☐ Evidence of the significance of the protected property - detailed summary of conservation values in accordance with the land trust's regulations
- ☐ Directions to property from closest public highway
- ☐ Description of easements, leases and other encumbrances on the property
- ☐ Proximity to other conserved properties

Physical and Ecological Features:

Maps

- ☐ Regional or municipal map showing easement location
- ☐ ***** Section of local road map showing easement location
- ☐ Copy (if available) of topographic map showing easement location
- ☐ Map(s) and/or survey(s) of property showing relevant physical and ecological features
- ☐ Man-made features: including buildings, roads, trails, power lines, water conveyances, fences, ponds and other relevant features
- ☐ Ecological Features: Flora, fauna, extent and nature of natural communities, threatened, endangered, *or* sensitive species, critical *or* significant habitat *or* migration corridors, regional significance of biotic resources
- ☐ ***** Scenic Features: Nature of scenic qualities, from what location does the general public see the scenic features
- ☐ ***** Recreational Features: Nature of recreation, any existing or proposed public access
- ☐ Local Government Policies: The easement as furtherance of current and adopted local government and land use policies
- ☐ ***** Archaeological or Historical Features: Document significant of historical structures or uses and/or archaeological features

Photographs

- ☐ Aerial photos
- ☐ Onsite photos, documenting all-important natural and man-made features, from easy-to-find photo points recorded on a map

References

☐ List of sources, books, maps, names of persons interviewed and other technical or scientific materials used to complete the Baseline Study.

APPENDIX M

BASELINE INVENTORY AND DETERMINATION OF LANDOWNER CONSERVATION GOALS

Date: **Time:**

Weather:

1. Landowner Contact Information:

Landowner's Last Name: First Name:

Property Address (including Postal Code):

Phone: E-mail: Fax:

2. Property Information:

Legal Description (Lot/Part Lot numbers, Concession, Municipality, etc.):

Location (latitude, longitude):

Surface Area (acres or hectares):

Maximum Elevation (m./ft.): Minimum Elevation (m./ft.):

Property Access:

Directions for Access to Property:

Area name:

EcoProvince: EcoRegion: EcoSection:

Maps:

Aerial Photo Numbers:

Other Photo Numbers & Locations:

Zoning: Land Use Designation:

Surrounding Land Use: Regional District:

3. On-Site Inventory Completed by:

Name

Address (including Postal Code):

Phone: E-mail: Fax:

4. Site Description & Ecosystems present:

A) Site Description:

%age	BIOME	Note the Ecosystem Type if present *(italics only)*							
	Forest	**Upland**	*Coniferous*	*Broadleaf*	*Mixed*	*Notes:*			
		Riparian	*Fringe*	*Floodplain*					
		Sub-alpine Parkland							
		Woodland	*Coniferous*	*Broadleaf*	*Mixed*				
	Grassland	*Shrub-steppe*	*Grass-Steppe*	*Coastal*					
	Shrub land								
	Wetland	*Shrub Swamp*	*Treed Swamp*	*Freshwater Marsh*	*Estuarine Marsh*	*Treed Bog*	*Peat Bog*	*Shrub Fen*	*Sedge Fen*
	Transitional Wetland	*Shrub-carr*	*Wet Meadow*	*Saline Meadow*	***Notes:***				
	Alpine Meadow	*Forb*	*Graminoid*	*Mountain-Heather*					
	Sub-alpine Meadow	*Forb*	*Graminoid*	*Mountain-Heather*					
	Shallow Open Water	*Floating Aquatics*	*No Floating Aquatics*						

	Pond				**Cliff**		**Spit**
	Lake				**Talus**		
	River				**Dune**		

B) Other Ecological or Heritage Values (buffers, corridor, archaeological, scenic…)

5. Land Uses:

If land is currently being used for any of the following purposes, please describe.

Recreational:

Hiking		Hunting		Snowmobiling	
Berry Picking		Fishing		Cross-country skiing	
Bird Watching		Four-Wheel Driving		Other:	
Picnicking		ATVing			
Camping		Trail Riding (horse)			

Scientific/Educational (research, nature study, etc.):

Habitat/Ecosystem Management or Preservation (planting, bird houses, etc.):

Residential (permanent residences, mobile homes, etc.):

Agricultural (orchard, vineyard, garden, horse/cattle pasture, etc.):

Forestry (reforestation, harvesting, etc.):

Commercial (sales to the public, etc.):

Industrial (mining, etc.):

Historical (previous knowledge of land use, including archaeological evidence):

6. Human-made Features:
Describe size, type and condition of:
Buildings/Structures:

Trails:

Wells:

Power lines:

Pipelines:

Other:

7. Disturbances:
Location on Map and Description:

Check off (if present) with number reference to map.

Vegetation/Animals:		Soil Removal:		Vandalism:		Trails/Roads/Cleared Lines:		Natural:	
Tree Cutting		Sand		Garbage		All terrain vehicles		Landslide	
Bark Stripping		Gravel		Signs		Roads		Flooding	
Collecting Plants		Peat		Cut Fences		Hiking Trails		Erosion	
Trapping Animals						Equestrian Trails		Fire	
Fire						Cut lines/Seismic			
Poaching						Fence lines			
Other Disturbances (describe):						Pipelines/Well site			
						Power lines			

Notes:

8. Wildlife and Wildlife Habitat:

Evidence of Wildlife:

Wildlife Trees/Snags		Animal Tracks		Animal Scat	
Squirrel Caches		Types of Animal Tracks:		Types of Scat:	
Bird's Nests					
Feathers					
Burrows					
Browsed Vegetation					
Other:					

Wildlife observed on property:

9. Vegetation (all vegetation can be described in larger zones or individual specimens of special note should be referenced to maps):

TREES (check those present & estimate % of cover)

*****Trees and shrubs are arranged in alphabetical order according to the common names.

Alder, Mountain *(Alnus tenuifolia)*		Fir, Grand *(Abies grandis)*		Pine, Ponderosa *(Pinus ponderosa)*	
Arbutus *(Arbutus menziesii)*		Fir, Sub-alpine *(Abies lasiocarpa)*		Pine, Western White *(Pinus monticola)*	
Aspen, Trembling *(Populus tremuloides)*		Garry Oak *(Quercus garryana)*		Red Cedar, Western *(Thuja plicata)*	
Birch, Paper/Water *(Betula papyrifera/Betula occidentalis)*		Hemlock, Western *(Tsuga heterophylla)*		Sitka Spruce *(Picea Sitchensis)*	
Big Leaf Maple *(Acer Macrophyllum)*		Juniper, Rocky Mountain *(Juniperus scopulorum)*		Spruce, Engelmann *(Picea engelmannii)*	
Cherry, Choke *(Prunus virginiana)*		Larch, Western *(Larix occidentalis)*		Yellow Cedar *(Chamaecyparis nootkatensis)*	
Cottonwood, Black *(Populus balsamifera ssp. trichacarpa)*		Maple, Douglas *(acer glabrum)*		Yew, Western *(Taxis brevifolia)*	
Douglas Fir *(Pseudotsuga menziesii)*		Pine, Lodgepole *(Pinus constorta var. latifolia*		Other:	

Notes:

HERBS/MOSSES/LICHENS, etc.

SHRUBS

Antelope – Bush *(Purshia tridentata)*		Hazelnut, Beaked *(Corylus cornuta)*		Sagebrush, Big *(Artemisia tridentata)*	
Alder, Sitka *(Alnus crispa ssp. sinuata)*		Honeysuckle, Orange *(Lonicera ciliosa)*		Saskatoon *(Amelanchier alnifolia)*	
Azalea, False *(Menziesia ferruginea)*		Honeysuckle, Utah *(Lonicera utahensis)*		Snowberry, Common *(Symphoricarpos albus)*	
Birch, Scrub *(Betula glandulosa)*		Huckleberry, Black *(Vaccinium membranaceum)*		Snowberry, Creeping *(Gaultheria hispidula)*	
Blueberry, Dwarf *(Vaccinium myrtilloides)*		Huckleberry, Red *(Vaccinium parvifolium)*		Snowbrush *(Ceanothus velutinus)*	
Blueberry, Oval-leaved *(Vaccinium ovalifolium)*		Juniper, Common *(Juniperus communis)*		Soopolallie *(Shepherdia canadensis)*	
Blueberry, Velvet-leaved *(Vaccinium myrtilloides)*		Kinnikinnick *(Arctostaphylos uva-ursi)*		Spirea, Birch-leaved *(Spiraea betulifolia)*	
Bog-Laurel, Western *(Kalmia microphylla ssp. microphylla)*		Maple, Douglas *(Acer giabrum)*		Spirea, Pink *(Spiraea douglasii ssp. menziesii)*	
Bramble, Five-leaved *(Rubus pedatus)*		Mistletoe, Western Dwarf *(Arceuthobium americanum)*		Spirea, Pyramid *(Spiraea pyramidata)*	

Cascara *(Ramnus purshana)*		Mock Orange *(Philidelphus lewisii)*		Spray, Ocean *(Holodiscus discolor)*	
Ceanothus, Redstem *(Ceanothus sanguineus)*		Mountain Ash, Western *(Sorbus scopulina)*		Sumack, Smooth *(Rhus glabra)*	
Cinquefoil, Shrubby *(Potentilla fruticos)*		Mountain Ash, Sitka *(Sorbus sitchensis)*		Tea, Labrador *(Ledum groenlandicum)*	
Cranberry, Bog *(Oxycoccus oxycoccus)*		Mountain Heather, Pink *(Phyllodoce empetriformis)*		Tea, Trapper's *(Ledum gladolusum)*	
Cranberry, High-bush *(Viburnum edule)*		Mountain Heather, White *(Cassiope mertensiana)*		Tea-Berry, Western *(Gaultheria ovatifolia)*	
Crowberry *(Empetrum nigrum)*		Nagoonberry, Dwarf *(Rubus arcticus, R. acaulis)*		Thimbleberry *(Rubus parviflorus)*	
Currant, Northern Black *(Ribes hudsonianum)*		Ninbark, Mallow *(Physocarpus malvaceus)*		Twinberry, Black *(Lonicera involucrata)*	
Currant, Skunk *(Ribes glandulosum)*		Oregon-Grape, Tall *(Mahonia aquifolium)*		Twinflower *(Linnaea borealis)*	
Currant, Squaw *(Ribes cereum)*		Penstemon, Shrubby *(Penstemon fruticosus)*		Willow, Arctic *(Salix arctica)*	
Currant, Sticky *(Ribes viscosissimum)*		Poison Ivy *(Rhus radicans)*		Willow, Barclay's *(Salix barclayi)*	
Devil's Club *(Oplopanax horridus)*		Prince's Pine *(Chimaphila umbellata)*		Willow, Bebb's *(Salix bebbiana)*	
Dogwood, Red-Osier *(Cornus stolonifera, C. sericea)*		Raspberry, Red *(Rubus idaeus, R. strigosus)*		Willow, Pacific *(Salix lucida ssp. lasiandra)*	
Elderberry, Blue *(Sambusus caerulea)*		Raspberry, Trailing *(Rubus pubescens)*		Willow, Sitka *(Salix sitchensis)*	
Elderberry, Red *(Sambucus racemos ssp. pubens var.leucocarpa)*		Rhododendron, White -Flowered *(Rhododendron albiflorum)*		Willow, Scouler's *(Salix scouleriana)*	
Falsebox *(Pachistima myrsinites)*		Rose, Baldhip *(Rosa gymnocarpa)*		Willow, Short-Fruited *(Salix brachycarpa ssp. brachycarpa)*	
Gooseberry, Black *(Ribes lacustre)*		Rose, Nootka *(Rosa Nutkana)*		Willow, Tea-leaved *(Salix planifolia ssp. planifolia)*	
Grouseberry *(Vaccinium scoparium)*		Rose, Prairie *Rosa woodsii)*		Other:	

Hawthorn, Black *(Crataegus douglasii)*		Rose, Prickly *(Rosa acicularis)*		Other:	

10. Red and Blue Listed Species/Ecosystems:

Plants:

Animals:

Communities:
Notes:

11. Notes on Neighbouring Properties:

CONSERVATION GOALS

12. Protected Area Plan:

This plan refers to fragile ecosystems that should have little or no human intervention and are delineated on the Property Zones Map.

Special Features:

13. Water Management Plan:

This plan refers to all water related areas delineated on the Property Zones Map such as wetlands, lake foreshore, bogs, river and creek banks usually protected by a fifteen meter zone.

Special Features:

14. Forest Management Plan:

This plan refers to all forested, wooded or treed areas as delineated on the accompanying Property Zones Map.

Special Features:

15. Agriculture Management Plan:

This plan refers to all farm related areas such as fields, paddocks, orchards, garden areas, green houses, growing areas and related activities as delineated on the accompanying Property Zones Map and includes all Agricultural Land Reserve (ALR) lands.

Special Features:

16. Area Enhancement Plan:

This plan refers to all roads, buildings, infrastructure, service corridors, etc., delineated on the accompanying Property Zones Map and all service access and maintenance requirements.

Special Features:

17. Other Management Considerations:

18. Remarks and Recommendations:

19. Lists of Maps, Photos or Data Sheets Attached:

20. Other Studies, Maps, References, Inventories on this property:

APPENDIX N - Property Information for Baseline Report

Introduction

The particulars of the Easement Agreement – and more specifically the purpose, reserved rights, and restrictions – dictate what types of information will be included in the Baseline Report. This Appendix looks at some typical restrictions contained in the Ontario Heritage Foundation's natural heritage easements and the types of baseline information that they require. Most of this information can be sketched onto your natural features map(s) as described in Section 7.6.2 and then described in the text of the Report.

It is important to note that if one of the characteristics in this checklist is not observed on the property, you should record the absence of that characteristic in the report. Do not simply neglect to mention it. For example, if there are no built structures on the property, include a sentence in the report which reads "No human-made structures were observed on the property".

THE OWNER SHALL NOT...

...erect or permit the erection of any buildings, signs, fences or other structures.

- ✓ Indicate on a map the location of every human-made structure within the boundaries of the easement, i.e. bridges, wells, sheds, fences, hydro poles/towers, septic beds, etc.
- ✓ Photograph each of these structures.

...plant or allow the planting of non-native plant species.

- ✓ Note the location of any non-native vegetation observed on the property.

...remove, destroy or cut any trees, shrubs or other vegetation except as may be necessary for the maintenance of existing accesses, the prevention of disease, or other good husbandry practises.

- ✓ Indicate the location and size of any woodlots.
- ✓ Describe the history of logging on the site.
- ✓ Indicate evidence of cattle use of streams and forests.

...construct or improve any road or other such facility except for the maintenance of existing foot trails, fire lanes or other accesses.

- ✓ Indicate on a map the location of existing trails and access points.
- ✓ Photograph a representative section of the trail or access point to indicate its width.
- ✓ Describe the trail system, when it was established, and why it is used.

...dump or allow the dumping of soil, waste, or other materials.

- ✓ Indicate on a map existing sites where materials have been dumped and describe them.
- ✓ Photograph these sites.

...allow any activities or uses detrimental to water conservation, erosion control, and soil conservation.

- ✓ Describe the vegetation on any major slopes and along stream banks.
- ✓ Indicate any areas which are susceptible to erosion.
- ✓ Indicate any existing evidence of erosion.
- ✓ Indicate if any water-taking is occurring.

...allow any changes in the general appearance or topography of the land including the construction of drainage ditches, retaining walls, dams and ponds.

- ✓ Photograph and map all existing ditches, ponds, streams, wetlands, and other water bodies (include both permanent and seasonal).
- ✓ For streams, indicate on the map the locations of major bends, pools, runs and riffles. Describe the materials on the bottom of the stream, e.g. gravel and sand, the width and depth, direction and speed of flow and any flora and fauna that they support.
- ✓ For wetlands, indicate their class and significance as well as any significant flora and fauna they support.
- ✓ For ponds, indicate if they are natural or human-made, their source, i.e. spring-fed, surface runoff, in-stream, etc., their depth,
- ✓ how often they dry up, their shape and the flora and fauna they support.
- ✓ Photograph and map any retaining walls, dams, or other structures.
- ✓ Include a topographical map and describe the topography of the land. Emphasize any unique or ecologically important features.
- ✓ Describe the drainage pattern of the property.
- ✓ Identify any recharge or discharge areas on the property, such as springs.

...dump, excavate, dredge, or remove loam, gravel, soil, rock, sand, or other materials.

- ✓ Indicate the location of any significant deposits of these materials.
- ✓ Indicate where any past dumping, dredging or removal occurred.

...operate or allow the operation of any type of motorized vehicles.

- ✓ Indicate the location of all trails and access points.
- ✓ Photograph and describe any evidence of past use by motorized vehicles, such as tire ruts.

...allow any activities or uses detrimental to the preservation of native plant and animal species.

- ✓ Map the major vegetation communities on the property and show their boundaries.
- ✓ Describe these communities (indicate location, dominant species, and the functions they serve such as linkage, attenuation of water flow, habitat, and so on).
- ✓ List the rare, unusual or sensitive flora and fauna which have been reported in the area by the landowner and by past studies as well as the species which you observe on the property. What is the status of these species locally, regionally, and provincially?
- ✓ Describe the natural and human-made habitat on the property. How common is this habitat in the ecological region where the property is situated?

APPENDIX O
BASELINE INVENTORY

Reference Statement:

Executive Summary:

Property Location:

Landowner Information:

Conservation Goals:

Protected Area Plan

Water Management Plan:

Forest Management Plan

Agriculture Management Plan:

Area Enhancement Plan:

Other Management Considerations:

Remarks and Recommendations:

Covenants (clip verbatim from Registered Easement):

Property Information:

Significant Areas boundaries:

Natural Features Descriptions & Ecosystems Present:

Water: Streams, Rivers, Ponds:

Land Uses:

Disturbances:

Wildlife and wildlife habitat:

Vegetation Communities:
Red and Blue listed Species / Ecosystems:

Cultural Features (buildings, trails, fences, access points, roads):

Notes on Neighbouring properties:

Photos and Photo Location Map:

List of Maps, Data Sheets:

Other Studies, Maps, References, Inventories on this Property:

On-site Inventory Completed By:

Date: **Time:**

Foundation Contact Person(s):

Acknowledgement of Condition Statement:

We the undersigned do accept and acknowledge the following document including the attached photographs as being to the best of our respective knowledge an accurate description of the natural features and current land uses on the subject property.

_____
Landowner

_____
Landowner

Date:

Ontario Heritage Foundation
Per:

APPENDIX P
Annual Stewardship Monitoring Report for Conservation Easements

Property Information:
Property Name:

_____

Has owner changed since last report? Yes ☐ No ☐
Landowner: _____

Address: _____

Telephone:_____ E-mail: _____

Monitoring Trip Preparation:
Appointment made with landowner for: _____
Date & Time

Appointment confirmed (at least 24 hrs. prior to visit): _____
Date & Time of call to confirm Appointment

Will landowner be present for the monitoring visit? Yes ☐ No ☐
If no, name designate:

_____

☐ Easement document reviewed and summarized
Baseline document reviewed and summarized
Property file and previous monitoring reports reviewed

Easement Materials:
Maps: ☐ Regional ☐ Municipal ☐ Topographic
☐ copy of Easement
☐ copy of Baseline Report
☐ copy of previous Monitoring Report, if any

Land Owner Interview:
☐ Reviewed terms of easement with landowner
☐ Reviewed any natural or man-made changes to the property with landowner
☐ Discussed any problems with trespass or neighbours that affect conservation values or that may constitute a violation of the easement
☐ Discussed landowner's plans for the property in the next 12 months, including plans to sell or lease the property

Does the landowner foresee any changes in the coming year? Yes ☐ No ☐
If Yes, describe (road construction, structures to be built, logging, etc.): _____

_____

_____

_____

Conservation Values:
☐ Wildlife/Plant habitat ☐ Scenic
☐ River/stream ☐ Adjacent to conserved property/public land
☐ Other (describe): _____

Property Condition:

☐ Boundaries identified & inspected—Conditions to note: _____

_____

☐ Visit to each photo point—differences between Baseline Report & this visit should be noted here and new photo taken: _____

_____

Log of Photographs taken:

#1 _____ #6 _____

#2 _____ #7 _____

#3 _____ #8 _____

#4 _____ #9 _____

Document any changes to land use practices: _____

_____

_____

_____

Summary of possible land management issues - describe:

☐ Degradation of riparian/wetland areas _____
☐ Transfer of water rights_____
☐ New roads_____ _____
☐ New structures/improvements_____
☐ New fences _____
☐ Timber harvest_____
☐ Mineral development_____
☐ Signs/billboards_____
☐ Commercial/industrial uses _____
☐ Recreational Uses_____
☐ Accumulation of trash_____
☐ Noxious Weeds_____
☐ Domestic animals_____
☐ Overgrazing_____
☐ Off Highway Vehicle use_____
☐ Subdivision_____
☐ _____
☐ _____
☐ _____

General impression and description of inspected area (quality of vegetation, well-maintained land uses/structures, etc.) _____

_____

_____

_____

_____

Questions or observations that require follow-up: _____
_____
_____
_____
_____
_____

Comments:
_____
_____
_____
_____
_____

Trip Details:
Date: _____Time: _____
Starting Location: _____ Odometer Reading: _____kms.
Finish Time: _____ Odometer Reading: _____kms.
TOTAL KMS.: _____

Members of Monitoring Team:

_____

_____

_____

_____

_____

_____

Report prepared by:
_____

APPENDIX Q

(Sample New Conserved Property Owner Letter)

(Letterhead)

(Date)

Dear (New Landowner)

The Trust for Land Restoration recently learned of your purchase of the real property located at (address/city or town). As you know, the use and development of your property is subject to the terms of the Conservation Easement dated (date) granted to the Trust for Land Restoration ("TLR") by (Grantor's Name). We welcome you to our community of conservation landowners! These landowners have worked with TLR to conserve _____acres of important (wildlife habitat/scenic open space, etc.), which will help preserve the special beauty and vitality of the community for future generations.

Enclosed are some materials about TLR, including our most recent newsletter and brochure, which we thought would be of interest to you. We are pleased to offer you a complimentary one-year membership in TLR, so that we can become better acquainted and introduce you to our programs and staff. We have placed you on our mailing list so that you will receive updates of TLR's activities.

We will contact you very soon in order to schedule a time to meet you on the property and review the Conservation Easement, answering any questions you may have about the Easement's terms and conditions. At that time, we will ask you to sign the enclosed Easement Acknowledgment form, the purpose of which is to verify that you have read and understand the Easement agreement.

As you may know, TLR was formed in 1998 and currently holds (number) of conservation easements. Our success in helping conserve lands of natural significance is due to our good relations with landowners. We hope to develop a supportive relationship with you in order to assist you in stewarding your very special property and to allow us to meet our commitment to uphold the Conservation Easement that protects your land in perpetuity.

Please feel free to visit us at our office or call us with any questions you may have about your land, the Conservation Easement or TLR.

Sincerely,

(Executive Director or Stewardship Coordinator)

enc

References

REFERENCES

Books/Documents:

A Guide to Stewardship Planning for Natural Areas. Ministry of Natural Resources, 2003

A Landowner's Guide to Wetland Conservation Plan – A Wetland Conservation Plan, 1997

A Strategic Plan for the Couchiching Conservancy. Couchiching Conservancy, 2003

Forming a Land Trust – Trumpeter, 1990 http://trumpeter.athabascau.ca

Ecological Land Classification for Southern Ontario. Ministry of Natural Resources

Gaweda, Joanna. *River Talk: A Report on Volunteer Monitoring in Ontario*

Gonzalez, Neida. *Wetlands and Woodlands*. Federation of Ontario Naturalists, 1996

Hager, Mark A. and Brundney, Jeffrey L. *Volunteer Management Practices and Retention of Volunteers*, 2004

Hilts, Stew and Mitchell, Peter. *Caring for Your Land – A Stewardship Handbook for Niagara Escarpment Landowner*s. Centre for Land and Water Stewardship, University of Guelph, 1994

Hilts, Stew, Puddister, Mike, McLaughlin, Lisa and Contributors. *Conservation Planning Training Manual*. Centre for Land and Water Stewardship, 2001

Land Securement Manual. Ontario Land Trust Alliance, 1999

Land Trusts in Carolinian Canada. Carolinian Canada www.carolinian.org

Learning from Nature: Canada – The Ecosystem Approach and Integrated Land Management, 2000

Land Registry. Ontario Land Trust Alliance

Paris, Kate. *Land Trusts: Measuring the Effectiveness of Conservation Easement Programs*, 2004

Riley, John. *Stewardship Manual*. Nature Conservancy of Canada, 2004

Risk Management Manual. Federation of Ontario Naturalists, 2001

Statement of Land Trust Standards. Ontario Land Trust Alliance, 2002

Thorne, Jason. *Baseline Reporting for Natural Heritage Easements*. Ontario Heritage Foundation, 1997

Who Does What – Bruce Trail Association Land Stewardship Program, Bruce Trail Association, 1998

Web Resources:

Carolinian Canada	www.carolinian.org
Couchiching Conservancy	www.couchconservancy.ca
Federation of Ontario Naturalists	www.fon.org
Land Trust Alliance (U.S.)	www.lta.org
Ontario Land Trust Alliance (OLTA)	www.olta.org
Ontario Nature	www.ontarionature.org
Trumpeter	http://trumpeter.athabascau.ca

GLOSSARY OF TERMS AND ABBREVIATIONS

ANSI	Area of Natural and Scientific Interest
Alvar	limestone plain covered with scattered vegetation that endures extreme wet and dry conditions, characterized by unique flora, scattered shrubs and limestone outcroppings
Avifauna	relating to birds
Channelization	straightening (of a stream)
ESA	Environmentally sensitive area
GIS	Geographic Information System
Herpetofaunal	relating to frogs and toads, lizards, salamanders, snakes, turtles
NEP	Niagara Escarpment Plan
NTS	National Topographic System
Talus	rock fragments of any size or shape derived from and lying at the base of a cliff or very steep slope. The accumulated mass of such loose, broken rock formed chiefly by falling, rolling, or sliding
Understorey	includes grasses, herbs, shrubs, and sometimes vines, ferns, mosses, lichens and fungi