



**Fundamentals of Conservation Restriction Stewardship**  
SEPTEMBER 21, 2017

All images courtesy of local and scenic Hudson Valley. Background: Conserved farmland at Old Mood Creek Farm in Lakota, NY/Robert Rodriguez, Jr., photographer. Blueridge in the South: Hudson River gorges at Saugerties Preserve, Dutchess Co. Cold Spring, NY/Rick Ziegler, photographer. Ploverfield in the Hudson Valley: Dutchess Co. Cold Spring, NY/Robert Rodriguez, Jr., photographer. Catskills conserved farmland at Northwood Farm in Red Hook, NY/Robert Rodriguez, Jr., photographer. View of the Hudson River and Catskill Mountains from scenic Hudson Valley Park in Red Hook, NY/Robert Rodriguez, Jr., photographer.

Greenbelt  
Massachusetts Land Trust Coalition  
Land Trust Alliance  
Together, conserving the places you love.

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### CR STEWARDSHIP: An Overview

- Baseline Documentation
- Annual Monitoring
- Landowner Relations
- Conservation Defense
- Record Keeping



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### LANDOWNER RELATIONS

- Benefits of relationship building
  - Partners
    - » Technical assistance
    - » Financial assistance
- Succession
  - How do you find out?
  - Tracking ownership changes
  - Welcome to your land trust
  - Develop procedures



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## CONSERVATION DEFENSE

- Have a Policy & Set of Procedures
  - Assessment
  - Roles & Responsibilities
  - Timing and Nature of Communication
- Documentation & Process!
  - Discovery
  - Documentation
  - Review
  - Resolution
- Tools & Resources
  - Terraforma
  - Legal Defense Reserves Calculator



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## RECORD MANAGEMENT

- Legal Defense
- Daily Operations
- Historic Record
- Legal Obligations
- Public Reputation



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## BASELINE DOCUMENTATION (BDR)

- Purpose
- When, How & Who
- Contents
- Tackling the Backlog
- BDR Supplements



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### BASELINE DOCUMENTATION (BDR)

- Purpose Statement
- Authorship & Qualifications
- Signature Pages
- Date of Completion



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### BASELINE DOCUMENTATION (BDR)

- Current Ownership
- Location and Directions
- Land Use History & Current Uses
- Background Information
- Conservation Values – Current Conditions

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### BASELINE DOCUMENTATION (BDR)

- Locator Map
- Topographic Map
- Orthophoto
- Photopoint Map
- Photos
- Reserved Rights
- Survey



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## BASELINE DOCUMENTATION (BDR)

- Current Conditions Reports
- Baseline Supplements



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## ANNUAL MONITORING

- Protect Conservation Values
- IRS Requirements
- Public Trust
- Landowner Relations
- Legal Defense



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## MONITORING PROTOCOLS

- Frequency of Monitoring
- Time of Year
- Landowner Involvement
- Monitoring Methods
- Documentation and the Monitoring Report



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**VOLUNTEER MONITORING PROGRAM:  
Training**

- Introduction to CRs
- Roles & Expectations
- Preparing for the Visit
- Outdoor Skills
- Troubleshooting Difficult Situations
- Completing the Report



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**VOLUNTEER PROGRAM  
COORDINATOR**

- Can be staff or a volunteer
- Annual calendar & work plan
- Recruitment, training & appreciation
- Tracks monitoring & contact with landowners
- Coordinates follow up activities with stewardship staff
- Ensures consistency with *Standards & Practices*

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**PUTTING IT ALL  
TOGETHER**

- Letter to current volunteer stewards
- Letter/phone call to landowners
- Identify additional volunteer needs
- Coordinate community outreach
- Review monitoring report form for revisions/updates
- Annual training
- Annual celebration
- Reminders to monitors
- Updates to tracking spreadsheet
- Review report forms for stewardship tasks/follow up




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## QUESTIONS

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