



Monitoring Procedure Summary

It is very important that the monitoring visit is a positive experience for both the landowner and the monitor. Never put yourself (or the landowner) in an unsafe or uncomfortable position. Your job is to complete the monitoring visit to the best of your ability. The Land Trust staff will deal with any problems.

This document provides an overview of the procedure for monitoring a protected property. For more details, review your [Volunteer Monitor Training Guide](#) or call the Conservation Stewardship staff at the Land Trust's St. Paul office at (651) 647-9590.

1. Review materials on the protected property.

The monitoring workbook contains the information necessary to conduct a successful monitoring visit, including:

- Directions to the property and ownership information
- Monitoring plan
- Maps of the property
- Past monitoring reports
- Baseline Documentation Report and any updates (including an overview of the property and the project, maps, and photos)
- Conservation easement and any amendments
- Any relevant approvals or interpretations given to the landowner
- Any current management plans for the property
- Information about the Land Trust
- Paper copy of the online monitoring report form

Review the workbook materials before going out on the land.

Please note: If there is any part of the easement or property description that you do not understand or if materials are missing from the workbook, please contact Conservation Stewardship staff before your visit.

2. Contact the landowner and schedule the monitoring visit well in advance.

Plan to visit the property sometime between April and September. Check the monitoring plan and/or notes on your assignment sheet of each property for details as to the timing of the monitoring visit. All monitoring visits *should be completed by September 30th* of each year.

- Call the landowner two to three weeks before you plan to monitor to schedule a visit. Schedule the visit at a time that is convenient for the landowner to accompany you, if at all possible. A follow-up call closer to the time of the visit is also recommended.

If you are unable to get in touch with the landowner or the easement contact, please call Conservation Stewardship staff before monitoring the property. Land Trust staff will decide when and how to conduct the monitoring visit.

- Invite and encourage the landowner to accompany you on the visit whenever possible. If the landowner is physically or otherwise unable to accompany you, ask if they would like to have someone else come along on the visit on their behalf.
- Inquire about the following items listed on the monitoring report form:
 - Current ownership status and whether the landowner has any plans to transfer or sell the land
 - Present uses of the property and any adjacent land uses that may be of concern
 - Any changes that have occurred to the land or buildings, either natural or human-made or planned changes upcoming
 - Any questions or concerns that the landowner may have about their easement, their property or the Minnesota Land Trust
- Make sure to get accurate, up-to-date contact information for the landowner and at least one alternate property contact. Make any needed changes on the *Contact Information* or *Monitoring Plan* sheets in the monitoring workbook.
- Provide information about the Minnesota Land Trust and conservation easements to any landowners, neighbors, or others who request it.

Be sure to contact the Conservation Stewardship staff if a landowner needs additional information.

3. The monitoring visit.

- Give yourself enough time to thoroughly inspect the property and to talk to the landowner. Plan to spend at least 2 hours at the property.
- Materials to bring on the visit:
 - Monitoring workbook
 - Pen, paper, and clipboard
 - Field measuring tape and compass
 - Camera
 - Bug spray and water
 - First aid kit
 - Monitoring “buddy” (particularly if you feel uncomfortable monitoring the property alone, have not visited the property previously, or would like another set of eyes)
 - Cell phone
 - GPS unit (if available)
 - Minnesota Land Trust nametag, business card, car sign, or clothing (if you have it)

- Talk with the landowner or the landowner's representative.
- Walk the property. Follow the monitoring plan. Be sure to:
 - Check the boundaries by walking around the property
 - Generally inspect the interior of the property
 - Visit any areas of special concern mentioned in previous monitoring reports
 - Visit any areas with special conservation features (such as rare plants, shorelines or wetlands)
 - Check any areas where special easement restrictions or reserved rights apply
 - Check for any new buildings or construction activities
- Photograph and measure (if appropriate) any significant changes on the property or any conditions that will help describe the property or help interpret your monitoring report such as:
 - Any alterations to the land from natural causes such as fire, wind, flood, or erosion
 - Other alterations or changes to the land
 - Changes to shorelines
 - Any new or remodeled buildings
 - Progress or status of specific management activities

Be sure to note the location and extent of any changes and any photographs taken on a map of the property. Take notes so that you may provide descriptions or explanations as well.

- Problems. Call the Conservation Stewardship staff immediately if you have any concerns or questions about the property or the landowner. It is important to deal with potential problems as soon as possible. Do NOT confront a landowner about a concern, but you can certainly ask for information or clarification. **In case of emergency, dial 911.** Monitoring visits are not “complete the visit at all costs” events under any circumstance.

4. Field Safety Guidelines. General field safety considerations:

- Trust your intuition and act on it – if you feel unsafe, leave immediately!
- Prepare for:
 - Inclement weather (rain jacket, appropriate footwear, warm clothing, etc.)
 - Biting insects – take precautions including repellent or Permethrin treated clothing, avoid skin exposure, and tuck socks into pants. Following your visit, a shower and thorough examination for ticks is highly recommended- early detection is key!
 - The terrain and conditions you will encounter. Be aware of both your physical limitations as well as individual risk factors, including exposure to allergenic plants and insects.
 - Emergencies. Carry a cellphone with you and dial 911 in case of an emergency. For non-911 emergencies, carry numbers for the landowner, the Land Trust, and your emergency contact. Be aware that cellular coverage may be lacking in certain areas regardless of your provider.

- Make sure someone knows where you are and when you expect to return. Leave a detailed itinerary with someone you can count on that provides your whereabouts, contact information for yourself, the landowner, and the Land Trust, and your anticipated time of return.

5. Documenting the monitoring visit.

Please complete the monitoring report form and any other documentation of the monitoring visit *within two days after the visit*.

- Monitoring report form: Document your visit with the online monitoring report form located at: www.mnland.org/monitoringreport
- Monitoring documentation: Email any monitoring maps or relevant correspondence with the landowner to Conservation Stewardship staff, or return it to the St. Paul office in the front pocket of the monitoring workbook
- Photographs: Email any photos and their descriptions to Conservation Stewardship staff; note where photos were taken and the direction of view on a monitoring map

6. Reimbursement.

If you would like to be reimbursed for postage, mileage, or any other expenses you incur, please return the expense reimbursement form included with the monitoring materials to our office in St. Paul.

If you are able to cover these expenses yourself, we would be thrilled to acknowledge your contribution to the Land Trust in our publications.

7. Return the monitoring workbook.

Please return the monitoring workbook and any other materials to the Conservation Stewardship staff at the Land Trust office in St. Paul *as soon as possible*. An addressed envelope is included with the monitoring materials for your convenience if you would like to mail these materials to us.

8. Thanking the landowner.

Please send the landowner a brief, handwritten thank you note after the visit. Blank note cards are included for your use. The results of the visit should NOT be addressed. A formal follow up letter will also be sent to the landowner by Conservation Stewardship staff.



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Last Updated: March 2020