

New and Old Techniques for Making Easement Stewardship More Efficient
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1. Overarching Considerations

- a. Staff capacity and structure (ex. permanent staff, seasonal, interns, volunteers)
- b. How many and what kind of properties being stewarded
- c. Establish a structure and process, document that process, then follow it consistently (ex. nomenclature, file structures, storage, archiving)

2. Non-Spatial Data

- a. Includes contacts, monitoring reports, dates of contact, violations, amendments, condemnations, documents (ex. deeds, forest management plans), task management
- b. Forest Society: Conservation Connections (Access database) → LOCATE
- c. TNC: Collector Companion/ArcGIS Online + Excel + Outlook + SharePoint Document Library and Database + Hard Files + Digital Files
- d. Considerations: time to switch technology types when a switch will make you more efficient than your current practice

3. Spatial Data

- a. Forest Society: stored in individual property files and individual maps → data driven pages for mass map making → no maps created unless problem → developing geodatabase
- b. TNC: single layer file with data driven pages to create map → geodatabase (AGOL) w/ automatically generated maps in Collector Companion Report; snapshot map made for monitoring visit; AGOL allows interactive map at any point in time on desktop or tablet device
- c. Considerations: Consistency of naming conventions for digital files & maps; how many attendees have ArcGIS (desktop or online)? Jack & Laura Dangermond (ESRI founders) vision of making technology accessible to layperson; TNC's experience seeing that.
Note, another workshop at SSP delves into spatial data collection options

4. Ground Monitoring Visits

- a. Forest Society: aerial photos used annually, ground monitor every 1 to 3 years
- b. TNC: easements get annual visits + aerial review w/ available AGOL imagery; Deed restrictions get annual drive-by + aerial review of AGOL imagery + ground monitor every 3 years
- c. Considerations: important to thoroughly document your procedures and why they are appropriate for your organization and your properties; "Standard Business Practices"; assess what will provide you with the level of detail needed for your organization (ATV trails, bootleg trails, shacks, forest cuts, boundary violations, construction, etc.)

5. Photos

- a. Forest Society: camera + compass + Excel + Word mail merge → GeoJot
- b. TNC: similar to prior Forest Society practice → tablet + Collector/ArcGIS Online to take monitoring photos, prior system still used for baseline photos, but implementing

Collector AGOL (then have photos available in our web map for easy reference in the field (be aware of resolution issues with tablets)

- c. Considerations: how often you take photos will influence your needs
6. Documents
- a. Includes baseline documentation reports, correspondence (esp. email), management plans
 - b. Forest Society: moving toward paperless as much as possible
 - c. TNC: retaining paper documents as essential originals (fire safe with binders), electronic duplicates, SharePoint document libraries for easy access by all staff
 - d. Considerations: electronic helps with volunteer access, remote access, Dropbox useful for sharing, what to keep or not (esp. email), how to store (convert emails to PDF, print?); never know when you are going to need access to information to address a question that can arise
7. Landowner Correspondence
- a. *Monitoring Visits:*
 - i. Forest Society & TNC – before visit: call or email; Forest Society sends postcard if no response
 - ii. Forest Society – after visit: formal letter → letter or email if needed, postcard if routine visit with no follow-up
 - iii. TNC – after visit: formal letter
 - iv. Considerations: gauge most appropriate method for each landowner (ask in survey or new landowner letter); nature of relationship with landowner; consistency of point of contact at land trust
 - b. *Cultivation:*
 - i. Forest Society: newsletter → events brochure → survey this year
 - ii. TNC: holiday card, event invitations, working with landowners to guide management decisions (Forest Society also does latter)
 - iii. Considerations: good relationships tend to result in fewer problems later on; demonstrates we are paying attention, that we care about landowner and land, that we can be a resource, bring landowners into the broader organizational fold