

Monitoring Conservation Restrictions

Preparation for the Visit

The Forest Legacy Program (FLP) Guidelines require that every Conservation Restriction (CR) funded by the program be monitored annually. Monitoring is the tool we use to protect the values of the conservation restriction. Regular visits allow us to maintain a relationship with the landowner and are our best opportunity to identify management concerns before they escalate.

Before arriving on the property, familiarize yourself with the Conservation Restriction, Forest Stewardship Plan (FSP), and Baseline Documentation Report. These documents are the foundation for monitoring.

During the visit, look for both natural and human alterations to the landscape. Try to cover as much of the property as possible, but if time is limited, focus on boundaries and disturbed areas. If the landowner accompanies you, use the opportunity to discuss any recent management activities and those that are being considered for the future.

It is not your responsibility to determine if a violation has occurred, but rather to gather information on the condition of the property. Use the space provided on the Monitoring Form to report, in detail, your observations as well as any changes or concerns. Please review the example monitoring form attached to this instruction sheet. The State FLP Coordinator will determine if a follow-up visit is necessary.

Steps in making a monitoring visit:

Pre-Monitoring

1. Establish your Monitoring Team (Landowner, CR Holder Representative).
2. Notify the property owner in writing or by phone well in advance of the visit. The landowner or his or her representative should accompany you on the visit if possible.
3. Notify any third party required to attend monitoring (i.e. The Nature Conservancy, local Land Trust).
4. Contact the DCR Service Forester to discuss the property's Forest Stewardship Plan, Forest Cutting Plans, and any other activities that they are aware of over the past year.
5. Review the easement's baseline data and conservation restriction. Take a summary of the restrictions (non-permitted uses) and property details for reference during the visit.
6. Gather the equipment you will need in making the inspection (maps, photos, camera, GPS, compass). Make a copy of the map from the Forest Stewardship Plan and use to depict your travel route.

During Monitoring

7. Look for changes and disturbances on the property. Take **photographs** of areas of concern. Try to take photos from the same vantage as in the Baseline Report. Provide **GPS waypoints and cardinal/quadrant direction** if possible.
8. Discuss observable changes with the property owner.

Post- Monitoring

9. Complete the inspection report form. When describing your observations, use as much detail as possible. Indicate if conditions have not changed since the last monitoring report. Include a map showing your monitoring route and the photographs you took with the completed photo log.
10. Sign the report and make a copy for your records. Return the **original** to the Forest Legacy Program.

Mail to: Mike Fleming
Department of Conservation and Recreation
355 West Boylston Street
Clinton, MA 01510

Example Monitoring Form, page 1



Massachusetts Forest Legacy Program

Conservation Restriction Monitoring Form

Forest Legacy Program Use Only

Follow-up visit needed?

☐ Yes ☐ No Date _____

CR Name: Pioneer Valley Forest Date(s) Monitored: August 6, 2014 Time spent: 2 hours

Monitor(s) name and affiliation: John Smith, Montague Conservation Trust

Address: 25 Main St. Montague, MA

Phone: 508-555-9782 Email: john.smith@montaguetrust.org

Name of landowner: Mary Peterson Was the property transferred / sold? ☐ Yes ☒ No

Preferred contact ☐ Letter: 78 Woods Rd., Montague, MA

☐ Phone: 508-555-6247 ☒ Email: mpeterson@mail.com

Was landowner contacted prior to visit? ☒ Yes ☐ No* Was landowner present for monitoring visit? ☐ Yes ☒ No

Did the landowner relay any information about past management or planned improvements? ☒ Yes* ☐ No

Did the landowner have any questions regarding the FSP or CR? ☐ Yes* ☒ No

*Please describe:

The landowner told me no timber harvesting will take place until the next management period. Some invasive weeds (multiflora rose and Japanese barberry) were mechanically removed from the south end of the property this year. The landowner is considering a chemical treatment in the next few years, as described in the Forest Stewardship Plan, if this treatment is unsuccessful.



What are the present uses of the CR property? (check all that apply)

- | | | | |
|---|--|---|--|
| <input checked="" type="checkbox"/> Forest Management | <input type="checkbox"/> Water Supply Protection | <input checked="" type="checkbox"/> Wildlife / Habitat Management | <input checked="" type="checkbox"/> Recreation |
| <input type="checkbox"/> Non-Forest Uses | <input type="checkbox"/> Research / Education | <input type="checkbox"/> Industrial / Commercial / Residential | <input type="checkbox"/> Other |

Please describe how the property is being used. Are these uses active? What actions support these uses?

Forest Management - A timber harvest was done in 2012, complies with FSP

Wildlife - A meadow on the property is periodically mowed to maintain wildlife habitat.

Recreation - The property is open to the public for passive recreation. A hiking trail crosses through the property and gets moderate use.

Did you observe any human caused alterations to the CR property? (check all that apply)

- | | | | |
|--|--|---|-----------------------------------|
| <input checked="" type="checkbox"/> Improvements / Maintenance | <input type="checkbox"/> New Structure | <input checked="" type="checkbox"/> Dumping / Storage | <input type="checkbox"/> Clearing |
| <input type="checkbox"/> Vegetation Management | <input type="checkbox"/> Construction of Roads / Paths | <input type="checkbox"/> Excavation / Filling | <input type="checkbox"/> Other |

Please describe, include extent, location description and GPS points if possible:

Improvements & Vegetation Management - Trail maintenance of existing hiking trail to remove overgrown weeds, and fallen branches, 1 hazard tree removed. Signs have been posted at key boundary entry points prohibiting motorized vehicles (photo 1).

Dumping - Small trash dump exists on East edge of property. Dump was documented in baseline and no changes in condition were observed (photo 2).

Did you discuss any of these changes with the landowner?

☒ Yes* ☐ No Landowner observed ATV use in the past. Signs were put up to deter them, no

*Please describe: new signs of ATV use have been seen since then.

Example Monitoring Form, page 2

When walking the boundary, did you observe any area where adjacent property usage abuts the property line?

☐ Yes* ☐ No

*Please describe: Property is part of a large forested area, all adjacent properties are in similar undisturbed forested condition.

Did you observe any natural alterations to the CR property? (check all that apply)

☐ Fire ☐ Flooding ☒ Erosion ☐ Vegetation ☐ Invasive Species ☐ Storm Damage ☐ Other

Please describe, include extent, location description and GPS points if possible:

Erosion - Minor erosion observed from past ATV use, unchanged from last year.
No other natural alterations were observed.

Did you contact the DCR Service Forester to discuss the FSP? ☒ Yes ☐ No ☐ Forester did not respond

Did the Service Forester indicate that any amendments to the FSP, cutting plans, or cost share practices were filed for this property within the last year?

No new plans were filed for this property within the last year. The current FSP expires in 2020.

Are cutting / forest management activities in compliance with the FSP recommendations? ☒ Yes ☐ No

Please describe:

The 2012 thinning/improvement cut was done in compliance with the Forest Stewardship Plan and Cutting Plan. Low quality trees were removed to improve growing conditions for high quality trees and increase light at the forest floor for regeneration of desirable species. Very little impact was observed from the harvest.

Final Observations:

Did you observe anything that should be reassessed during the next monitoring visit? ☐ Yes* ☒ No

Did you observe any alterations that need to be reviewed to determine compliance with the CR? ☐ Yes* ☒ No

*Please describe below

Comments (use additional page if necessary):

I walked the property boundary, focusing on the boundary condition in the north east section of the property which is most heavily used due to the hiking trail. Property condition has not changed in the last year. All management activity by the landowner was as described in the Forest Stewardship Plan.

Attachments Included: ☐ aerial photo ☒ ground photos ☒ maps ☐ illustrations ☐ additional pages ☐ other

Signature: John Smith

Date: August 14, 2014

[illegible]