

SANTA FE CONSERVATION TRUST MONITORING POLICY

Policy 2011-11 =03

Adopted on: December 1, 2011

Updated: April 25, 2023

Philosophy Statement

The Santa Fe Conservation Trust ("SFCT") is dedicated to upholding its legal and community obligations to preserve the conservation easements it accepts for as long as such easements exist. In recognition of the fact that SFCT conservation easements are perpetual in duration, SFCT understands that one of the keys to preserving these conservation easements is its commitment to monitor, defend and enforce the terms of each conservation easement on a consistent basis. In addition, SFCT owns lands in fee that may become public conservation areas, and SFCT understands that regular monitoring of such lands is critical to conserving the conservation attributes of such fee lands.

Landowner Outreach

SFCT understands that one of the best ways to ensure that conservation easement violations are kept to a minimum is through a strong relationship with our landowners. SFCT therefore actively encourages staff and board members to be involved in landowner relations wherever practical. Outreach efforts are especially important to ensure that new owners of the property are aware of the existence of the easement and the impact of its restrictions.

Successive Landowners

SFCT recognizes that it is particularly important to establish relationships with successor landowners when conservation easement protected land is transferred to new ownership. SFCT believes that proactive information sharing and relationship building with new, or potential new owners of conserved property, can avert many potential violations.

Therefore SFCT Staff shall 1) work to proactively identify conservation easement properties likely to be transferred, 2) initiate relationships with successor landowners in a timely manner, and 3) establish a cooperative relationship with new landowners.

To accomplish these goals, the land trust shall:

annually, to detect any changes and to ensure the property is being used in accordance with the terms of the easement restrictions or management plan. Properties in which landowners are exercising reserved rights may need to be monitored more frequently during the planned activity to ensure that all parties understand and adhere to the restrictions.

Monitor Qualifications and Training

The Executive Director, Land Program Manager, SFCT staff members or trained volunteers may conduct monitoring. The Executive Director in advance of any monitoring activity must specifically approve individuals who conduct annual monitoring visits. Each year, the Land Program Manager will bring a list of monitors to the Executive Director for approval. Prior to commencing monitoring, SFCT monitors shall receive adequate training in the methods and importance of the monitoring process, its relation to SFCT overall conservation easement and fee land management program and how to conduct the monitoring in a safe and professional manner. A detailed description of the Monitoring process is located in the Monitoring Procedures.

Methods of Monitoring

Typically, all monitoring site visits are performed on the ground by either walking, biking, or driving in a vehicle (or a combination of modes to make the site visit as efficient as possible). Aerial or remote sensing /satellite monitoring may occur but must be supplemented by a ground visit at least once every five years, unless there is a change of ownership of the land, in which case ground monitoring must occur within one year after SFCT learns of the transfer. This will help to ensure that SFCT maintains regular contact with the land and the landowners (by visiting with them in person) and guarantees SFCT staff familiarity with individual properties. It is the goal of SFCT to have annual personal conversations with those landowners whose properties are periodically monitored remotely. During extreme drought or high fire danger annual monitoring may take place from nearby vantage points or remotely to reduce the risk to the land and the monitor.

Monitoring shall focus on the conservation easements use restrictions and reserved rights: if buildings are prohibited, observe whether there is new construction; if mining is prohibited, observe whether the land surface is disturbed; if reserved rights have been exercised, document this fact; and so on. Some features that require particular attention include:

- Boundaries or other areas that are vulnerable to encroachment

- Roads and other access ways
- New trails or access points
- Flagging tape
- Areas of recent activity permitted by the easement
- Signs of disturbance (for example, excavation, vegetation distress, dumping, tree felling)
- Indicators of property conditions (for example, erosion, residual dry matter, invasive species, water quality)
- Activity in or around building areas (existing or reserved), if applicable
- Areas heavily used by landowners or by the public

A fee property inspection involves:

- Looking for threats to conservation values
- Observations related to the property's condition and conservation values
- Checking boundaries
- Noting trespass and associated problems
- Noting numbers, dates and types of visitor use
- Checking the condition of structures or hazards
- Observing uses of adjacent property

Suspected Violations

Easement monitors are to inspect properties and document their observations. Monitors will only document factual information and, in the event of a suspected violation, will follow SFCT's Conservation Easement Violation Policy and report their observations to the Executive Director.

Conflict of Interest

SFCT's Conflict of Interest Policy shall apply to all monitoring activities conducted by the organization. No individual who owns property covered by a SFCT conservation easement, including Board members, staff or volunteers may monitor an easement on their own property, neighboring properties or any property in which they have a direct interest, financial or otherwise.

Revising the Policy

From time to time the Monitoring Policy may be revised for the following reasons: (1) to correct errors or clarify ambiguities; (2) to comply with Land Trust Standards and Practices and generally accepted practices in the land trust field; (3) to describe current

monitoring procedures of the organization; (4) to recognize changes in organizational capacity or types or numbers of easement properties being protected; or (5) other reasons that the organization deems important to uphold its stewardship responsibility. Any revisions to the Monitoring Policy require the prior vote and adoption by the Board of Directors of SFCT before implementation.

A handwritten signature in black ink, appearing to be 'Brant Goodman', written over a horizontal line.

Brant Goodman, Secretary

4/25/23

Date

