Conservation easement monitoring report

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Baseline references, repeated photo points and monitoring coverage. Fill in each field; the grey line under it says what goes there. A filled sample follows the blank form.

Property and monitoring coverage

Identify the governing record and how the visit was made.

Property and easement

Name property, grant date and current landowner from the file.

Monitor and date

Record monitor, date, visit times and observed weather.

Present

Name companions and distinguish an invitation from attendance.

How monitored

☐ On foot ☐ By vehicle ☐ Aerial or satellite imagery

Identify methods actually used under the holder's policy.

Documents read before the visit

☐ Easement deed ☐ Baseline documentation report ☐ Last monitoring report ☐ Approvals since last visit

List dated deed, baseline, prior report and approval versions reviewed.

Access and landowner account

Attribute changes and plans without making them direct observations.

Contact before the visit

Retain contact date, method and access agreement.

Changes the landowner reported

Record the landowner's account with speaker and date.

Plans that may need approval

Identify the proposed work and actual deed provision needing review.

Baseline point comparisons

Make each view repeatable, including limits on an exact repeat.

Point	Location	Direction	Against the baseline	What changed	Photo

Point	Location	Direction	Against the baseline	What changed	Photo

Point: Use the baseline point identifier.
Location: Retain coordinates or a repeatable landmark and any access limit.
Direction: State the view direction used for the photograph.
Against the baseline: Identify the baseline image compared and observed difference.
What changed: Describe visible change without assigning a violation.
Photo: Use the original image's file name or persistent ID.

Changes for governing-document review

Attach observed locations to the relevant deed or baseline reference.

Structures and building area

Locate changed structures for staff to compare with the permitted envelope.

Boundary, fences and subdivision

Describe boundary, fence or division concerns without deciding legal effect.

Clearing, timber, fill or dumping

Locate and estimate observed clearing, fill or dumping with method stated.

Roads, trails and utilities

Describe new or altered routes and utilities.

Farm use and conservation values

Record visible use and condition tied to the protected feature.

Holder questions and follow-up

Preserve the referral and response under the holder's procedure.

Possible issues

State the observation, location, date and evidence for staff review.

Status

☐ No issues observed ☐ Question for staff ☐ Possible issue reported

Select the status that reflects the holder's current review.

Follow-up

Name reviewer, next action and due date; retain the response.

Signature

Sign the visit record and preserve it with the property file.

Conservation easement monitoring report

SAMPLE · FICTIONAL FARM

Filled in for the Alder Brook property, a made-up easement. Alder Brook property is a fictional 212-acre farm and woodland under a conservation easement held by a fictional land trust in the Hudson Valley of New York.

SAMPLE · Property and monitoring coverage

Property and easement

Alder Brook, easement granted 2009; landowners Paul and Rita Senft

Monitor and date

C. Abara, October 3, 9:00 to 1:30, overcast, 58 °F

Present

Paul Senft for the building area

How monitored

☒ On foot ☒ By vehicle ☐ Aerial or satellite imagery

Documents read before the visit

☒ Easement deed ☒ Baseline documentation report ☒ Last monitoring report ☒ Approvals since last visit

SAMPLE · Access and landowner account

Contact before the visit

Phone, September 24; walk any day that week

Changes the landowner reported

Replaced the culvert on the farm lane in May. Put up a run-in shed for two horses.

Plans that may need approval

Thinking about a timber sale in the north woods in two years. Told him a harvest plan needs approval first.

SAMPLE · Baseline point comparisons

Point	Location	Direction	Against the baseline	What changed	Photo
PP1	Gate on the county road	45°	Same		P1
PP2	Farm lane at the brook	90°	Changed	New culvert, lane width unchanged	P2, P3
PP4	Barn, from the drive	180°	Changed	Run-in shed, about 12 by 24 ft, east of the barn	P5
PP6	North woods edge	0°	Same		P7

SAMPLE · Changes for governing-document review

Structures and building area

Run-in shed east of the barn. Position against the building envelope on the baseline map to be checked by staff.

Boundary, fences and subdivision

Boundary walked on the west and north. Neighbor's mowing extends about 15 ft past the west line near PP3.

Clearing, timber, fill or dumping

None seen.

Roads, trails and utilities

Culvert replaced on the farm lane; no widening

Farm use and conservation values

Hayfields cut, as in the baseline. Brook buffer intact.

SAMPLE · Holder questions and follow-up

Possible issues

Run-in shed location against the building envelope (P5). Neighbor mowing past the west line (P4).

Status

☐ No issues observed ☒ Question for staff ☐ Possible issue reported

Follow-up

Staff to check the shed against the baseline map by October 17; letter to the neighbor if needed

Signature

C. Abara, October 3