

Lesson Plan for Monitoring Training Session

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Course will be conducted over two days. The first day of instruction will be classroom based. The second day will be a half day field session.

Content: Course attendees will upon completion understand the nature of conservation easements and the purpose and importance of monitoring. After the session attendees will be aware of the basics of monitoring and how to record observations made during monitoring visits.

Prerequisites: The course is structured to be a primer and detailed knowledge of monitoring is not necessarily required to benefit from the material though a basic understanding of conservation easements is required. Nevertheless a background/familiarity with natural resource management is beneficial. This includes basic skills in reading maps and use of compass.

Pework: Background information will be distributed to attendees. This will include articles, examples of pertinent forms and documents and an introduction to terms and concepts related to conservation easements and monitoring. This will be distributed either via email or posted on an ftp site and instructions to access information will be sent to attendees. Attendees will be asked to review State Policies related to monitoring for their State. They will also be asked to bring an example of a monitoring documentation report to be used in discussion. Pework will be discussed during classroom session and attendees will have an opportunity to pose questions.

Instructional Objective: .Attendees will learn important concepts including: conservation easement purposes, baseline documentation, record keeping, conservation values, reserved rights, prohibited activities. Attendees will be able to interpret easement terms, document on site observations, have some knowledge of do's and don'ts when conducting monitoring and will know how to complete a monitoring form and what to do with it after it is completed.

Specifically:

- Objective #1 Attendees will develop a familiarity with terms and concepts related to conservation easements and monitoring.
- Objective #2 Attendees will learn how to prepare for and carry out a monitoring visit.
- Objective #3 Attendees will understand the importance of monitoring and landowner relationships.
- Objective #4 Attendees will know where to obtain information and help related to monitoring.

Instructional Procedure:

Classroom Session

1. Course will begin with a review of the prework. In this first session the focus will be on background, importance of monitoring, and discussion of terms. Attendees will have the opportunity to ask questions about the prework. (30 Minutes)
2. Discussion of terms/concepts to be followed by a lecture on the basic components of monitoring conservation easements. The topics below are covered in the power point presentation that accompanies this lesson plan. (45 Minutes)
 - ❖ Purpose of monitoring, frequency of monitoring, important aspects of monitoring (relationship with the landowner to avoid infractions rather than correcting infractions.)
 - ❖ What to write in the report. (provide sample reports.)
 - ❖ How to store the report (recordkeeping.)
 - ❖ Information from court cases to illustrate importance of monitoring
 - ❖ Annual sit-down meeting with landowner
 - ❖ Discovering and documenting a violation.
3. Land Trusts are important partners to the Forest Legacy Program. They are excellent resources when discussing monitoring. Land Trust Personnel will lecture on the way they conduct monitoring and will share their on the ground experiences. This will offer context, allowing for greater understanding of the material presented. (45 Minutes)
4. A speaker will share the Federal Perspective on Monitoring. (20 Minutes)
5. State personnel responsible for monitoring will discuss how the monitoring responsibility is addressed by the State Lead Agency. This representative can be from the State where the training is held or can be from another State. The presenter will also lead a role playing exercise to expose monitors to situations they may come across. (45 Minutes)
6. The final class session will be a facilitated discussion on preparing for a monitoring visit and post visit actions. One exercise will be the review of several monitoring reports and critiquing them. Attendees will be asked to bring monitoring forms from their agency. (1 Hour)
 - Also to be discussed will be:
 - ❖ When to schedule a monitoring visit
 - ❖ Documents to take along on a visit; what to keep in the office. (not only conservation easement, but any agreements or plans required by the easement.)

- ❖ What is done after the visit? Document storage. Steps to take if a violation is detected.

Field Session

Attendees will have the opportunity to monitor a Forest Legacy property and put monitoring skills into practice. One half day should be sufficient for the field portion of the exercise unless there is significant travel time.

Students should come away from the field session, having practiced:

1. gathering up the right documents to take into the field
2. discovering a violation
3. communicating with a landowner
4. documenting observations

To ensure the best use of time the instructor should visit the property before the training session and determine what areas should be visited. Plan the discussion and know what you want the attendees to see. If the group is large set up several stations and break the group into smaller units of 3-4 persons.

Experience shows that there is more dynamic discussion in smaller groups. After all groups have visited the stations; reconvene and compare notes.

In preparation for the field session a suitable property will be identified by FS and Host State. Property should be of a reasonable size so that attendees can see much of the property during the session. If there is not an appropriate FLP property near where the session is held; a property held by a unit of government authority or a local land trust should be sought. In this instance a representative of the holding organization will be asked to present to the group a discussion of how they conduct monitoring. During the classroom session the attendees will review the conservation easement, baseline report, previous monitoring reports, and any related management plans.

Materials and Equipment: Background information will be distributed to attendees. This will include articles and example of pertinent forms and documents. This will be distributed either via email or posted on an ftp site and instructions to access information will be sent to attendees. Attendees will be asked to review State Policies related to monitoring for their State. They will also be asked to bring an example of a monitoring documentation report to be used in discussion. Additional information will be provided to attendees at the start of the session.

Logistics: Classroom should be near the property to be visited. If the agency does not have an office located nearby explore other options. These could include Firehouses, Libraries, Town Halls, Schools and offices of local land trusts.

The instructor should plan on where the group will eat. If possible it is preferable that meals are taken together on both the class day and the field day. Planning on bag lunches can save a lot of time.

Keep an eye on the weather. Let attendees know what they need to bring ie boots and raingear. Ensure that there is sufficient water on hand for the field day.

Know in advance what will be done if someone is hurt or is sick. Know where the nearest hospital or urgent care facility is located. The instructor should have directions from both the class location and field location.

Assessment/Evaluation: Attendees will be asked to complete an evaluation where they will be given the opportunity to share their perspective on the session. This includes an assessment of whether objectives were met. This will hop inform the development and presentation of future training sessions.

Follow up: The type and degree of follow up will be determined by the needs and requests of the attendees.

One appropriate means of follow up is to schedule a conference call one year out from the training. Participants will be able to share lessons learned, changes they have made in monitoring practice, and what they wished the course had covered.

Vocabulary: Conservation easement, conservation values, baseline documentation, monitoring protocol, monitoring report, photo points.

Related field/issues: Baseline development, enforcement actions, record keeping.

Prewrite

Related terms and concepts.

- ❖ Conservation easement
- ❖ Conservation easement terms/provisions/clauses
- ❖ Conservation easement purpose section
- ❖ Baseline documentation
- ❖ Stewardship Plan
- ❖ Monitoring conservation easement (include any possible form of monitoring; fly-over, computer-based, meeting in L/O kitchen, walking the property.)
- ❖ Monitoring protocol
- ❖ Monitoring report
- ❖ Conservation easement violation (technical, minor, major)
- ❖ Grantor (owner)
- ❖ Grantee (holder)
- ❖ Monitoring policy
- ❖ Precedent
- ❖ Record keeping policy
- ❖ Map
- ❖ Photos/images