

Upper Peninsula Land Conservancy
Conservation Property Monitoring Policy
Standard 11C
AND Standard 12D

Board Approved Original: September 8, 2015

Definitions:

- Conservation Property** – Any of four types of properties protected by UPLC for conservation values, namely: Conservation Easements, Working Forest Conservation Easements, Conservation Preserves, and Conservation Reserves.
- Conservation Easement (CE)** – Property owned by another party on which UPLC holds a conservation easement.
- Working Forest Conservation Easement (WFCE)** – CE that permits commercial forest management.
- Conservation Preserve (CP)** - Property owned by UPLC that does not include any commercial activities.
- Conservation Reserve (CR)** - Property owned by UPLC that includes management for commercial forest products.
- Trade Land** – Property owned by UPLC that is not protected for conservation purposes but rather held temporarily as an asset to be sold to support the organizations conservation programs.
- Land Trust Alliance (LTA)** – National association of land trusts that provides standards and practices for member land trusts.

It is the policy of the Upper Peninsula Land Conservancy (UPLC) to monitor every Conservation Property it holds at least annually. Monitoring is the process of inspecting and documenting the conditions and changes of a property over time to ensure that it is being consistently managed in compliance with the easement provisions or the preserve/reserve management plan. Monitoring helps build relationships with easement landowners and may save time and money by preventing problems and/or by identifying them quickly. Monitoring is essential for documenting violations as they occur, and for providing a record of property conditions over time in case legal action is necessary. Annual monitoring of conservation easements is necessary and legally required to satisfy Internal Revenue Service requirements for tax-deductible conservation easements (IRS form 990). Monitoring data may also be useful for scientific research and analysis.

Conservation Properties owned by UPLC staff, board members, or committee members, will be monitored according to the UPLC *Conflict of Interest Policy* (LTA Standard 4).

Monitoring of Conservation Properties will be completed using *Conservation Property Monitoring Procedures* and *Monitoring Report Template*, which include the standards and practices recommended by the Land Trust Alliance.

General Monitoring Requirements

The Stewardship Committee is responsible for ensuring that:

- All Conservation Properties are monitored annually, or more frequently if needed.
- Annual communication takes place with the landowner or preserve/reserve donor.
- Monitoring visits are documented in the project file on paper and electronically.
- Potential violations are identified and addressed quickly.
- All monitors will be trained to implement the monitoring policy and procedures by a person approved by the Stewardship Committee.