Recordkeeping for Conservation Easement Stewardship

WeConservePA

Organizing essential documents in a secure, accessible system is a fundamental part of conservation easement stewardship. This guide describes the systems of 14 land trusts.

Introduction

To be able to steward conservation easements responsibly and effectively, an easement holder must establish a system for organizing, storing, and accessing the documents, reports, correspondence, and other materials related to each easement.

Different land trusts use different systems, depending on organizational size, resources, and other factors. Though the details can vary, all systems contain some of the same basic elements. Large organizations might have a full-time records manager; smaller land trusts usually don't have this luxury.

This guide outlines key components of stewardship recordkeeping and summarizes common approaches. In the final section, 14 land trusts describe their recordkeeping methods in their own words.

Key Features of Systems

Recordkeeping systems should:

- Allow present and future staff and board members to easily access essential documents and information
- Ensure that critical documents will be preserved in perpetuity
- Protect private information
- Use storage space efficiently
- Aid the land trust in the case of litigation
- Comply with any applicable legal requirements

Standards and Practices

Land Trust Standards and Practices (9.G.) states that land trusts should:

1. Adopt a written records policy that governs how and when organization and transaction records are created, collected, retained, and destroyed.

2. Keep originals of all documents essential to the defense of each real property transaction in a secure manner and protected from change or loss.

3. Create and keep copies of these documents in a manner such that both originals and copies are not destroyed in a single calamity.

Practices 1, 2, and 3 are indicator practices for land trust accreditation. Additionally, Practice 1 is a prerequisite for Terrafirma insurance enrollment.

Important Documents

Stewardship recordkeeping includes (but is not limited to) the following documents:

General
- Written stewardship policies and procedures

For Each Easement
- Donation or purchase agreements
- Grants of conservation easement and amendments
- Baseline documentation reports and updates
- Photos, maps, and surveys
- Easement closing documents
- Critical correspondence including landowner requests for interpretation, approval, and waiver and land trust responses
- Resource management plans and records of land trust decisions
- Monitoring workbooks, plans, and reports

For Collection of Easements
- Master list of all easements (including details such as amendments, violations/resolutions, and landowner contact information)
- Easement monitoring assignments and status

Paper or Digital?

Most land trusts keep a combination of digital and paper documents. Some use external hard drives, but, increasingly, organizations use the cloud to back up digital documents. Cloud-based backup systems used by land trusts include:

- Backupify
- Crash Plan
- Dropbox
- Egnyte
- Google Drive
- Microsoft Sharepoint

To comply with *Land Trust Standards and Practices*, organizations store original paper documents in secure storage facilities with fire protection and humidity control or in fireproof safes (either on or offsite).

Project Files

Folder Organization

Most land trusts create a digital file for each easement they hold; some also create a paper file. The file contains copies of all the necessary documents related to that easement. (As described in the previous section, original paper documents are stored in a secure, disaster-proof location.) The documents are often sorted into subfolders such as *Stewardship* and *Baseline Documentation*.

Project Labels

There are different ways to label easement projects. Often, land trusts use the last name of the original easement grantor and/or a set of numbers (for example, *Stewart-1701*, where the number refers to the first project of 2017). If land ownership changes, some land trusts change the project label to reflect the new landowner's name; others continue to use the original name. If the same landowner grants multiple easements over time, numbers or years are used to distinguish the different easements.

Alternatively, some land trusts use the name of a prominent landscape feature (e.g., Baldwin Hill or Spruce Lake) to identify a property, sometimes combined with a number, year, or other identifier.

See the "Examples" section below for multiple examples of labeling systems.

Pre-Closing Versus Post-Closing

Most land trusts create files for in-progress acquisition projects the same way they create files for completed acquisitions. A typical method involves creating separate folders (or using separate file cabinets/drawers); once an easement acquisition is finalized, that project file moves from the pre-closing folder to the post-closing folder. In organizations where multiple staff members are working on the same project, they might store documents separately, then combine them into a project file upon closing. Alternatively, cloud-based systems like Google Drive allow staff to access and upload documents to shared folders in real time.

Document Saving and Filing Procedures

The general saving and filing process is relatively straightforward: when a document is created or received, a staff member saves it in the appropriate digital or physical project file. Specific procedures vary based on an organization's technology, resources, and preferences.

Most land trusts create documents using Microsoft Office software, save the final version in PDF format, and print hard copies. Organizations can easily print email exchanges with landowners, and save them digitally as screenshots, text files, or by copying and pasting text into a Word document; physical letters are usually scanned and uploaded to the computer. Some land trusts document phone conversations by filling in a template, while others track these interactions in database software.

Formalized filing procedures prevent documents from being lost or misplaced. In its recordkeeping policy or office manual, an organization should describe the process

for creating, uploading, saving, scanning, and/or storing documents.

Database Software

Larger land trusts often use database software to keep track of their easements, while smaller land trusts with relatively few easements might use an Excel spreadsheet. ConservationTrack, LOCATE, and Landscape are conservation-specific software programs land trusts use. Other organizations track easement projects (along with information about members, donors, etc.) in more generic database platforms like DonorPerfect, Total Community Manager, and Microsoft Access.

Monitoring Schedules

Many land trusts use a spreadsheet (Microsoft Excel and Google Sheets are popular options) to track easement monitoring visits. The spreadsheet generally lists each property and includes relevant information such as location, current landowners (with up-to-date contact information), date of last visit, date of next scheduled visit, and monitor name. This spreadsheet also serves as a master list of all the easements an organization holds, especially for land trusts without database software.

Examples

In this section, 14 Pennsylvania land trusts explain their stewardship recordkeeping practices, addressing the following topics:

- Document Storage and Backup
- Project Files
- Project Labels
- Pre-Closing Versus Post-Closing
- Monitoring Visits
- Procedures

The explanations came directly from land trust staff, often the person in charge of stewardship or the executive director. Responses have been lightly edited for clarity.

Allegheny Land Trust

Document Storage and Backup

"We use Landscape and a shared cloud storage for primary storage of easement documents from acquisition to monitoring. We have a fire safe folder for the originals and signature pages. A paper folder is created for each easement. We do not maintain paper copies of monitoring reports or baseline documents."

Project Files

"Each easement has a site in Landscape, a cloud-based folder, and paper folder found in the fire safe located at our office."

Project Labels

"We prefer to name the easement by its given name (for ex. Barnswallow Farm Easement, Catch the Wind Farm Easement) and not after the landowner, but in many situations the property is not called anything formal so we then call it by the last name of the original granter."

Pre-Closing Versus Post-Closing

"Even with the addition of Landscape, we still have no different pre- and post-closing processes."

Monitoring Visits

"We use Landscape mobile app for recording photos and documentation during monitoring visits and the desktop version for tracking and saving all monitoring reports. Our visits are all completed in the August to December time frame."

Berks Nature

Document Storage and Backup

"We do a combination of both paper documents and electronic copies backed up on the cloud. In addition to cloud storage, we utilize Landscape software for electronic data storage redundancy. Berks Nature also uses DonorPerfect, which also keeps track of our easement owners."

Project Files

"Each easement has its own electronic folder where all monitoring reports, BDRs (baseline documentation reports), etc. are kept. Any subsequent correspondence related to easement amendments or exercise in rights is kept in that easement's electronic file. Paper folders include maps, monitoring reports, and a copy of the grant of conservation easement is scanned for electronic record retention. Our electronic filing system is backed-up by cloud storage and Landscape software for redundancy."

Project Labels

"Projects are filed under the name of the original easement donor and that does not change even if the ownership changes. For example, our very first easement is *#1 – Thun*. The current owner is Leibman, but we still refer to it as the Thun easement. Sometimes we'll call it the Thun/Leibman easement. All easements are also assigned a unique, sequential serial number."

Pre-Closing Versus Post-Closing

"We have an electronic folder titled *Current Projects/Easements* where in-progress acquisitions are filed by name. When the easement is completed, the entire file moves to a folder titled *Completed Projects/Easements*. Electronic files for pre-closing and post-closing are also backed-up via cloud storage. We are also utilizing Landscape software for management of all easements post-closing and for redundant record keeping."

Monitoring Visits

"We have an Excel spreadsheet with information on all easements. Our monitoring visit letters go out each December. Our easement stewardship specialists schedule monitoring visits with landowners/managers according to geography and time. They complete a report for each monitoring visit. All easement monitoring reports are stored electronically."

Procedures

"We are currently formalizing existing procedures for all document retention practices related to landowner contacts, conservation easement preparation, acquisition, and long-term monitoring and stewardship."

Brandywine Conservancy

Document Storage and Backup

"Our electronic documents are saved on a server that is backed up every night. We have all of our original irreplaceable documents scanned and saved on the server in addition to original copies saved in our archive building in fireproof filing cabinets. Original copies of our monitoring reports are saved in a working file for each easement. Electronic copies are saved in our database software."

Project Files

"Each easement has its own electronic and paper stewardship file. Within the master file for each easement, there is a subfolder for each property.

- Hard copy stewardship files: Each property has two paper folders. The *Stewardship* file contains the easement, aerial photographs, maps, photos, building sketches, past monitoring reports, etc. The reports are attached to the left side of the folder with a two-prong tab and organized chronologically with the newest on the top. All photos and sketches are kept in report covers. The *Correspondence* file contains all of the correspondence, organized chronologically, with the most recent on the top.
- Electronic stewardship files: Each property has an electronic folder. There are three subfolders, labeled *Correspondence*, *Photos*, and *Maps & Misc.* The *Maps & Misc.* folder contains copies of impervious sketches, deeds, aerial photographs, etc. The other folders are self-explanatory. The electronic monitoring reports are kept in the database.

- Hard copy original files: Original copies of all essential documents are saved in archival storage. These include things like the original easements, amendments, thank-you letters for donation, board approval minutes, BDRs, title insurance, Form 8283, easement maps, appraisals, etc. They are labeled with the easement name.
- Electronic original files: Electronic original files contain scanned copies of original documents, baseline documents, easements, amendments, recorded maps, subordination agreements, appraisal summaries, title commitments, legal agreements, resolutions, etc."

Project Labels

"Each easement is named after the grantor and that does not change. If the same grantor grants multiple easements, they are labeled with 1, 2, 3, etc. (e.g., *Smith 1*, *Smith 2*, *Smith 3*, etc.). We happen to have a very common surname that grants many easements. In that case, we have begun to name all of those easements numerically as well, even though it is not the same grantor. For example, John Davis, Steve Davis, Sarah Davis, Emily Davis, etc. all donate easements. They are now labeled *Davis 1*, *Davis 2*, *Davis 3*, and *Davis 4* even though they were not the same grantor.

In our electronic file system, the main folder is labeled with the name of the easement grantor and there are subfolders for each subdivided property. The subdivided folders are labeled *Easement Name (Landowner Name)*."

Pre-Closing Versus Post-Closing

"We have separate electronic files for in-progress acquisition projects, and hard copies are kept with the staff member who is working on the project. These projects are handled by our land conservation team. When the easement is recorded, it is transferred to our stewardship team which then files things appropriately."

Monitoring Visits

"We have an Excel document for our monitoring schedule. Each of our easements is organized into a group. Each group has anywhere from one to seven easements in it, depending on their size. Each group is designed to take one day or less to monitor. They are grouped geographically so it makes sense to do them all at the same time. We also try to group easements together if they have the same landowner.

On the schedule, we can keep track of when the group was monitored the previous year, when it is scheduled to be monitored for the current year, who is responsible for the group, the monitors for the year (we take two on every visit), and any comments about the group or special monitoring or notification comments.

We sort the schedule first by this year's monitoring date and then last year's monitoring date. That way we can easily see what is scheduled already and what should be scheduled soon. We try to schedule at least three weeks ahead so that we can get our monitoring letters out two weeks ahead.

Our database also keeps track of what has been monitored once we file the monitoring report."

Procedures

"We store any correspondence we receive from the landowner in the *Stewardship* file. Any important correspondence is also scanned and saved in the electronic *Stewardship* file. Email correspondence is printed and saved as well. Monitoring reports are saved within the database. They are also printed and saved in the *Stewardship* file. We scan any correspondence we send to the landowner (with signature) and also make copies so the correspondence is saved in both the electronic and hard-copy *Stewardship* files. Any plans for reserved rights are saved either electronically or in the *Stewardship* file.

We have a naming system for saving electronic documents: YY-MM-DD Easement Name (Landowner Name and/or Lot Number) Name of Document (e.g. *2017-8-15 Smith (Davis-Lot 4) Monitoring Follow-up*

Letter). This way, when we look at the electronic *Correspondence* folder, documents are sorted chronologically."

Brandywine Red Clay Alliance

Document Storage and Backup

Paper copies of working files are held onsite, with originals kept with <u>Iron Mountain</u> and all electronic copies kept on the server, which is backed up daily by the IT company.

Project Files/Labels

Projects are organized in large folders for paper records and have been labeled by type and numerical order of completion (CE1, CE2, F1, F2 for fee, etc.). This eliminates the need to know the original landowner or current landowner as they begin to change hands at a higher rate and planning for future staff turnover. The labels are listed in the master project spreadsheet along with original donor, recording info, grants received, etc. All files on the server are grouped by type (CE vs fee) and while still labeled with original donor name, each folder name begins with the classification code (CE1...) to reinforce this shift and to cross reference with the paper files.

Monitoring Visits

Monitoring annual schedule is organized by season with roughly half the properties done in the spring and half in the fall. Original monitoring records are sent to Iron Mountain at the end of the year. At the end of each monitoring day, originals are copied for on site records and scanned and sorted to their respective property folder on the server, which is backed up. Monitoring remains largely on the ground with rare uses of remote monitoring due to the scope of our portfolio. Photos are backed up on the server and are limited to critical changes per discussions with LTA and other organizations over the years.

Procedures

BRC has an approved recordkeeping policy for critical records. Project related records are managed by the land preservation team, who adhere to accreditation standards pertaining to originals vs working copies. The focus is always on scanning important and relevant documents immediately to ensure they are retained digitally and backed up there, as paper is still easy to misplace.

ClearWater Conservancy

Document Storage and Backup

"We store digital and hard copies of documents. Digital documents are backed up on an external hard drive and original hard copies are stored offsite."

Project Files

"Each property has its own file. Standard sub-folders are established for various components associated with the grant of conservation easement and baseline documentation."

Project Labels

"We use simply the name of the property or, as appropriate, name of the property owner."

Pre-Closing Versus Post-Closing

"There is a different area of the hard drive for *Archived* versus *In Progress* properties."

Monitoring Visits

"A monthly Excel spreadsheet for the Land Conservation and Stewardship Committee reflects the status of monitoring visits and report completion and mailing."

Procedures

"We use hard copies and some digital in the field; uploading and storing occurs mostly back in the office after the monitoring visit. We are exploring digital access and uploading from the field."

Delaware Highlands Conservancy

Document Storage and Backup

"We use a combination of digital and paper documents, in addition to keeping originals of critical documents in an off-site fireproof safe per LTA Standards and Practices. We do not use a specific land protection database software.

We save digital files on a shared central server. Files from the server are automatically backed up daily to an online data protection system which is encrypted and conforms to HIPPA regulations. At the end of each year, all files are backed up to an external hard drive, which is stored at an offsite location."

Project Files

"Each project file (digital and paper) contains the same filing structure:

- Correspondence
- Easement
- Grants
- Monitoring
- Project Overview
- Project Settlement
- Property Info (includes Baseline Documentation Report)
- Publicity

All documents within these folders are filed in chronological order with the newest documents on top. Digital versions of final documents (including standard correspondence letters, conservation easements, and BDR documents) are labeled with the date (YY-MM-DD), followed by the property name and the appropriate document title in capital letters (e.g., 10-05-28 Baldwin Hill II BASELINE DOCUMENTATION REPORT)."

Project Labels

"At closing, each property is given a unique number and name. The number includes a three-digit sequential number, the first letter of the county where the property

is located, and the year of easement closing. The name usually refers to a landscape feature associated with the property (e.g., 031-W-2005 Baldwin Hill II). If a landowner chooses to exercise their right to subdivide and sell a portion of the protected property, the numeric portion of the unique name will then consist of an alphabetic addition (e.g., 031a-W-2005 Baldwin Hill IIa, 031b-W-2005 Baldwin Hill IIb).”

Pre-Closing Versus Post-Closing

“Information for in-progress acquisition projects is kept in a similar fashion to post-closing projects in order to decrease workload later.”

Monitoring Visits

“We use a monitoring spreadsheet for each year that contains information on monitoring visits, including dates of monitoring visits; staff, volunteer, and landowner attendance; monitoring report completion dates; dates that post-monitoring letters were sent; post-visit stewardship tasks; and notes for next year.”

Procedures

“Final electronic documents (typically a Word document) and an appropriately labeled scanned version of the signed document (typically a PDF document) will be kept. The staff will periodically review old and new files to ensure that hard copies are backed-up in the applicable electronic files and that all filing systems are consistent.”

Additional Insight

“For more detailed information, see the Delaware Highlands Conservancy Records Retention Procedures.”

Farm and Natural Lands Trust of York County

Document Storage and Backup

“We back up all easement work periodically on an external hard drive (about once a week or every two weeks, depending on the amount of work completed). The original BDR hard copy is filed in a fireproof cabinet.

Another copy is placed on a shelf. We are also currently in the process of transitioning to using Landscape as an additional method of document storage. All easement acquisition and associated ongoing stewardship files are stored digitally within their corresponding property profile within the Landscape database.”

Project Files

“In addition to the filed BDR, a folder is kept in another file cabinet with other documents such as our inquiry form. Folders are kept in alphabetical order. Additionally, project files are stored within Landscape.”

Project Labels

“We label projects by the original grantor’s last name. An Excel document contains other vital information such as easement date, landowner names, contact information, acreage, parcel ID, appraisal value, township, site inspection month, etc.”

Pre-Closing Versus Post-Closing

“There are no differences in recordkeeping between pre-closing and post-closing projects.”

Monitoring Visits“We utilize Landscape to track, schedule and complete all annual monitoring reports. This was our first year utilizing Landscape. It’s greatly improved our efficiency by allowing us to geotag all photos taken in the field, schedule and track correspondence with landowners and create our annual monitoring schedule.”

Lancaster Farmland Trust

Document Storage and Backup

“We use a combination of electronic and hard copy storage. Electronic files are stored via a cloud-based server that is also stored as an encrypted backup in multiple data centers across the world. Backups are retained for 7 years and run multiple times per day. Additionally, we utilize external hard drives/flash drives to provide a digital backup of irreplaceable original documents. Those external drives are stored at an offsite location. For

database software we are currently using Landscape for our easement transactions, and all documents are uploaded to this system. We also use Landscape's app for monitoring which creates some efficiencies from a stewardship perspective."

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Project Labels

"We use a year-number format to identify properties, where the first four-digit number is the year and the three-digit number is the project number (for example, 2017-001). This makes searching in Landscape, GIS, Windows Explorer easier when considering many of our landowners have similar names."

Pre-Closing Versus Post-Closing

"There is really no difference in pre-closing and post-closing projects in terms of the file system. We do rename project files with the specific year they are concluded, so a project started in 2023 may have a number assigned, but if it closes in 2024 it would be assigned a different number at some point in the process."

Monitoring Visits

"Monitoring visits are tracked in Landscape using a dashboard. When scheduling and completing visits, staff update the status of each property's monitoring visit for the year. The status of each visit is then displayed in the

dashboard. County GIS data is reviewed quarterly, and property tax assessment records and the County Recorder of Deeds are reviewed before each monitoring visit for ownership changes. When staff becomes aware of a transfer of ownership, new owner information is updated in Landscape, our preserved farms GIS dataset, and the baseline documentation report."

Procedures

"All communications and monitoring correspondence are stored electronically within the respective project folder. Most original documents are produced in Microsoft Word with the final draft saved in a PDF. Communications on letterhead are scanned and saved as PDFs to the appropriate folder. A paper copy of the monitoring report is printed and inserted in the office's copy of the BDR for use in the field during the next monitoring visit. Electronic copies are also stored on Landscape."

Land Conservancy of Adams County

Document Storage and Backup

"We keep paper copies of all records. At the completion of a project, we create a file for permanent off-site storage, and one copy of that file that is kept in our office. Another file is used for monitoring visits, which just includes the easement, BDR, and previous monitoring reports. Because we are provided office space and IT support from the county, all our electronic files are on a county server, which the county backs up. We do not use specific database software (yet)."

Project Files

"Each property has an off-site file, a copy of that file in the office, and a file for monitoring. The backup file of original documents is organized by a three-section folder. The first section has the easement deed and BDR, the middle section has documents pertaining to the preservation process such as: title searches, commitments, and the title insurance policy; appraisal; Committee and

Board project reviews; and sales agreements. The last section is for communications and matters that take place after the easement is recorded."

Project Labels

"We use year and number. For example, *2017-3* would be the third easement closed in 2017."

Pre-Closing Versus Post-Closing

"We have a separate location and system for in-progress acquisition projects. Most documents are stored electronically, but paper documents that have been generated are kept in a project file."

Monitoring Visits

"In 2021 we began using Landscape Land Conservation Software as a tool to store property information, conduct annual inspections, and track new project tasks. Because we have not adopted a policy to keep electronic files instead of paper copies, physical copies of monitoring visit reports are kept in our off-site permanent files as well in our on-site monitoring files. Landscape has eliminated the need to carry physical monitoring files with us on property visits, which is a huge benefit. Using the software app we can access every property's easement deed and can see the routes of previous visits. We still record the date of all completed monitoring visits in an Excel file for easy reference."

Procedures

"Important landowner communications by email are printed and kept in the off-site file and backup file in the office. If we receive a phone call that we think should be documented, we have a form on the computer to fill out on that is then printed and kept in both off-site and in-office files. Other new documents for a project are similarly handled – one copy in the off-site file, one in the backup file in the office."

Natural Lands

Document Storage and Backup

"We keep paper copies of documents, as well as scanned electronic copies. The electronic copies are stored in the cloud."

Project Files

"In both paper and electronic format, we have a folder for each easement. Within an easement folder we may also have individual folders for separate tax parcels, depending on ownership. For example, an easement may be divided into five tax parcels with three separate owners, so we would have three property files within one easement file; if another parcel gets sold off and a fourth owner comes into the fold, then we add a fourth property file to the easement folder.

Our original "hands off" paper files consist of recorded easement documents (including amendments, if applicable), maps, surveys, phase I environmental assessments BDRs, appraisals, Form 8283s, proposals and/or agreements of sale, and closing documents (settlement sheet, title insurance policy, etc.). Our "working" paper files include folders for recorded easement documents, correspondence, monitoring reports, maps, photos, special projects (like plan reviews), impervious coverage tracking, violations (when appropriate), and amendments (if applicable). There is also a copy of the BDR and survey in the folder.

As noted above, the electronic files for completed easements are also organized so that each easement document has its own folder. In that folder, stored at the first level are important documents that are referenced the most frequently for easement administration. This includes things like the recorded easement, survey, BDR, amendments (if any), resource management plans, etc. The rest of the documents related to the easement are organized into three subfolders: project manager (*ProjMan*), background documents (*BackgroundDocs*), and easement administration (*EasementAdmin*).

- *ProjectMan* includes all documents leading up to the recording of the easement. Draft easements and BDRs are in here, as well as appraisals, phase I environmental assessments, maps, proposals, surveys, tax info, title work, grant funding applications and agreements, and anything internal, including invoices.
- *BackgroundDocs* includes final versions of easement closing documents and due diligence, like the settlement sheet, appraisals, title insurance policy, Form 8283, Board approval documents, phase I environmental assessment, etc.
- *EasementAdmin* includes subfolders for monitoring reports, correspondence, impervious coverage tracking, photos, plans/construction related to the exercise of reserved rights, violations, and amendments."

Project Labels

"Our front-facing naming system is based on the name of the grantor (and sometimes also includes a reference to the property name if there is one). In 2023, we also developed a unique ID for each easement, which consists of the following: closing year, county, state, property interest type (conservation easement, deed restriction, façade easement, trail easement), easement holder (Natural Lands or our affiliate, Montgomery County Lands Trust), and the number indicating the order in which the easement was completed in that year (1, 2, 3, etc.). We haven't yet added the unique IDs to our paper or electronic files. These IDs are currently used on the back end to easily match up the properties and their associated data among our various databases, including Landscape, Lens, and GIS."

Pre-Closing Versus Post-Closing

"For pre-closing projects, project managers maintain a folder in our active easement projects folder, and this eventually becomes the *ProjMan* folder in the completed easement file."

Monitoring Visits

"Starting in 2023, we use Landscape, our new land protection database, to track and record monitoring visits and data, which are split between in-person visits and remote monitoring using Lens."

Procedures

"For the 2023 monitoring season, we transitioned to using our new database, Landscape. During this transition year, our easement program staff fill out their monitoring forms and collect monitoring data directly in Landscape using both the mobile app and online version. This accounts for approximately two thirds of our monitoring obligations in 2023. The other one third of monitoring visits are completed by our stewardship staff using paper monitoring forms (which is historically how we completed all monitoring forms). The data collected on the paper monitoring forms by stewardship staff is then entered into Landscape by easement program staff. For those properties that are monitored remotely using Lens, we also incorporate the PDF of the Lens report into the monitoring form in Landscape.

After all monitoring forms are completed in Landscape, a PDF of the final monitoring report for each property is generated and saved in our electronic easement files and printed for the paper files.

We anticipate that for the 2024 monitoring season, all monitoring staff will fill out monitoring forms and collect monitoring data directly in Landscape."

Northcentral Pennsylvania Conservancy

Document Storage and Backup

"We have paper copies of the conservation easement, letters (on letterhead) we send and receive, and other items. We also keep electronic copies of finalized and filed conservation easements and BDRs."

Project Files

"Each property has a set of files:

- Correspondence (leading up to the conservation easement)
- Correspondence (after the conservation easement is signed)
- Background/technical information
- Monitoring
- Grant of conservation easement copy
- Grant of conservation easement drafts

If there's something going on—gas lease, timber sale, anode bed, house being built—there's a file for that."

Project Labels

"The files in the office are labeled with the name of the conservation easement. Terrafirma requires a project number, so we use the year of the project and then consecutively number the projects. *2001001* is the first conservation easement completed in 2001."

Pre-Closing Versus Post-Closing

"They are in different filing cabinets to help keep them straight. Currently, in-progress acquisition projects don't have a standardized set of files, which we plan to correct."

Monitoring Visits

"We have an Excel spreadsheet that lists the conservation easements (rows) and the calendar years (columns). This helps us verify in one place that everything is getting done. Copies of the letters sent out in advance of the visit and after the visit are kept in the *Correspondence* file and *Monitoring* file. We also use a standardized monitoring report that is completed and filed in the *Monitoring* file."

Western Pennsylvania Conservancy

Document Storage and Backup

"All important documents are scanned onto our network. Original (paper) deeds and conservation easements are stored off-site. Digital documents are backed up on external storage devices."

Project Files

"Each project has its own electronic folder on our network. Contents are divided into *Land* (with subfolders for *Due Diligence, Legal, Financial*, etc.) and *Stewardship* (with subfolders for *Monitoring, Management, Maps*, etc.). To aid sorting, Stewardship files (letters, reports, photos, etc.) are named starting with the date (YYYY-MM-DD)."

Project Labels

"In the *Land* files, we name each property according to the last name of the original grantor. In the *Stewardship* files, we name each easement according to the last name of the original grantor, and each fee property with a public name (e.g., *Bear Run Nature Reserve*). There are exceptions to this rule. Easements that are subdivided retain the original name, followed by an underscore ("_") and the new owner (e.g., *Smith_Brown*)."

Pre-Closing Versus Post-Closing

We use the same filing system for prospective properties as we do properties that close. Our database and GIS track property status as *Prospective, Property for Review, Current, Inactive,* or *Past*.

Monitoring Visits

"We use ArcGIS Survey 123 on an iPad to document our monitoring visits and export the data to a SharePoint database."

Procedures

"Important paper documents are scanned/saved to the network. Important emails also are saved."

Wildlands Conservancy

Document Storage and Backup

"We store our stewardship recordkeeping documents in two hard file systems: a master file and a working file. We also store them on a server hard drive (with two off-site

backups, one on each coast of the United States) and on the cloud-based Landscape software.”

Project Files

“Each property has its own folder with the following subfolders: Appraisals, Baseline Documents, Conservation History/Communications, Defense, and Monitoring Records.”

Project Labels

“Our naming system is related to the owner’s last name at time of conveyance and year of conveyance. For example, Edith Stevens has given two easements, one in 1999 and one in 2014, named *Stevens 1999* and *Stevens 2014*. If more than two properties are conveyed in the same year by the same owner, they are further identified by lot number (i.e., *Keystone 1998 lot 3*).”

Pre-Closing Versus Post-Closing

“Pre-closing easement documents are stored in our land protection department’s server and on Landscape. They don’t receive the multiple hard copy records until they are held by the trust.”

Monitoring Visits

“Landscape allows us to track monitoring visits. It automatically shows which easements still need to be monitored that year and allows us to track which monitoring visits are scheduled and completed. Our master list of held land/easements is maintained in an Excel file but can also be accessed through Landscape (though it is not as graphically organized in that format).

Landscape also allows us to record monitoring visit data in the field and synch live to the cloud, geotag our photos, and will soon provide track logs. This is our first year using Landscape exclusively for monitoring purposes, but we had great field test success last season.”

Procedures

“New documents are stored in all of the above locations when received. Monitoring reports are reviewed by our

property stewardship director before being uploaded to all locations. Landscape allows us to keep close track of communications by displaying who the staff was, who the outside contact was, what was discussed, the mode of communication, and the date/time. At present only critical defense communications are stored in Landscape but we are transitioning to more frequent use of that feature.”

Willistown Conservation Trust

Document Storage and Backup

“Currently, we use Landscape for monitoring reports; we also save a copy to our server in a folder along with the original easement documents. In the past, we have stored a hard copy of annual monitoring reports in a fireproof safe off-site, but we are moving away from this with the ability to sign digitally and timestamp reports in Landscape.”

Project Files

“We store project files on our server organized by Easement and divided into Compliance, Fee and Welcome Letters; Improvement Reviews and Issues; and Violations. We are looking at migrating project files into Landscape and using it as a data warehouse. In the past, we were using physical binders, but have moved away from that with the adoption and increased functionality of Landscape.”

Project Labels

“We use the Original Grantor and the year of donation to organize file folders on the server. Within subfolders, we divide folders by owner and years of ownership. For example, main folder: Doyle 1997 (Easement), subfolders: Doyle (1997-2003), Smith (2004-2010), Greene (2011-).”

Pre-Closing Versus Post-Closing

“There are no differences in recordkeeping between pre-closing and post-closing projects.”

Monitoring Visits

"We use Landscape to track, schedule, and assign monitoring visits to staff. The ability to record data and fill out forms in real-time in the field is a huge time saver. We do still store photos on the server as a backup and also because of volume. We are experimenting with storing more photos in Landscape and only including pertinent ones in the annual monitoring report. We are still utilizing a Google spreadsheet to share the monitoring schedule with other staff who may want to join and don't have credentials for Landscape. Also, our ED or development staff will tag along on-site visits. We put them on a shared Google calendar so other staff can join, and our admin can load the visits into our donor software as interactions. We are hoping that eventually, Landscape will be able to integrate with our donor software, Bloomerang."

Procedures

"We create documents in MS Word and export them as PDFs. If practical, some documents are electronically signed in Adobe Acrobat. Documents requiring a notary are signed by hand and in person. All project files are saved in a cloud-based fileserver that can be accessed from anywhere, including in the field. Important email threads are exported as PDFs and saved in project folders on the fileserver. The Landscape software has the ability to track and record communications, which we have experimented with, but have not committed to yet."

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