

# National Ecogift Monitoring Survey Final Report

Written by Damien Barstead  
The Land Trust Alliance of British Columbia  
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Regional Survey Coordinators:

Damien Barstead - BC  
Hazel Smith - Prairies  
Melissa Watkins - Ontario  
Terri Monahan - Quebec  
Margo Sheppard - Maritimes

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## National Ecogift Monitoring Project – Final Report

### Background

Through the design and implementation of a survey focused on Canada's land trust community, questions related to the common practices, methods, and extent of monitoring activities were addressed. Of primary concern were the monitoring practices related to properties donated to land trusts through Environment Canada's Ecological Gifts program. The goals of this survey were to determine what protocols and methods are currently being used by Canada's land trust community; if these methods vary between the Ecological Gifts (Ecogifts) and non-Ecogift properties; and to produce a "roadmap" for the design, implementation and adoption of standards related to Ecogift monitoring that would satisfy both Environment Canada and the land trust community as a whole.

## **SECTION 1**

### **GENERAL RESULTS, SUMMARY, ROAD MAP & NEXT STEPS**

#### Summary

General results from the survey itself indicate that regular monitoring is considered to be very important, essential to the long-term integrity of protected areas as well as the organization(s) which have worked or are working to protect them. Methods of monitoring Ecogifts generally do not vary from those used to monitor non-Ecogifts. If methodology was noted as different, monitoring efforts tended to be equal or more extensive on Ecogift properties with the exception of only one survey respondent nationwide. It is difficult to make conclusions on a national scale regarding strengths and weaknesses of monitoring practices related to Ecogifts, as results vary from region to region. The survey did reveal certain aspects that may need more consistency in one or more regions: the production of monitoring reports, the safe long-term storage of important monitoring documentation, and the appropriate use of monitoring protocols, methods, and forms were identified. In addition, the survey respondents and the regional representatives indicated that there are some funding programs available for acquisition, but funding for "stewardship" is lacking. This includes costs of capacity building, monitoring, and managing Canada's protected natural and cultural sites. A full summary of the survey results can be found in Section 2, and complete national and regional survey results are in Section 3. A separate NCC (national) survey submitted on March 29 is in Appendix A.

#### Workshop Summary

The regional representatives who conducted and/or administered this survey along with Environment Canada CWS representative Blair Hammond gathered to discuss the results of the survey and the future direction of this initiative. The representatives included Jamie

Simpson, representing the Maritimes, Terri Monahan (by telephone) representing Quebec, Melissa Watkins and Bernie Vandenberg, representing the OLTA, and Jim and Hazel Smith representing the prairie provinces, and Sheila Harrington and Damien Barstead representing the LTABC.

Through these discussions, several points were unanimously agreed on which begin to outline minimum guidelines for the monitoring activities of land trusts. Although many additional relevant comments were made, below are a list of fundamental suggestions and thoughts related to the development of a common framework for land trusts to follow.

### **Workshop Participant Recommendations**

- a. Any imposed or specified monitoring methods/protocols or strict standards would not readily be accepted by the land trust community and would likely be met with resistance.
- b. Flexibility is needed for any monitoring standards or protocols in order to accommodate the varied properties and situations that land trusts deal with (e.g. properties with difficult/no access vs. properties with significant recreational values).
- c. Any guidance and support (financial and otherwise) offered to land trusts would generally be welcomed.
- d. Broad minimum guidelines could help ensure that land trusts would be capable of adequately maintaining their lands and would add an element of accountability for future donors and funders.
- e. Guidelines should be developed and adopted by all land trusts wishing to receive Ecogifts.
- f. It is reasonable to expect that some type of formal guidelines should exist as there are significant responsibilities associated with the protection of lands in perpetuity.
- g. These guidelines, at this point, should be distinct from any formal “Standards and Practices” which are encouraged or adopted by OLTA, LTABC and Quebec.
- h. The production of adequate documentation, coupled with safe and appropriate storage of these files would satisfy Environment Canada’s and/or CRA’s needs for a “reporting framework” if provided upon request.
- i. It is recommended that all land trusts adopt these guidelines, regardless if they currently hold Ecogifts or not.
- j. Properties acquired through the Ecogift program are generally well monitored or managed, however aspects of the Ecogift Program itself, such as the appraisal process, takes too long and requires extensive work by the land trust.

The discussion points noted above clearly point toward the need for the development of minimum standards related to Ecogift monitoring, the production and storage of relevant documentation, and to the capacity of land trusts to effectively steward - monitor and manage their land interests on a long-term basis. Below are six points drafted through discussions by the regional representatives which will be forwarded to regional land trusts for review as minimum guidelines related to the monitoring of protected sites in Canada.

## Draft - Monitoring Guidelines

As Monitoring is an essential component of holding land or interests in land;

1. Land trusts agree to monitor their land interests regularly at least once a year, or as appropriate to the easement/covenant/servitude, unless a written agreement to monitor is made with another conservation organization or another rationale is provided;
2. Land trusts will use a formal monitoring protocol of their own making or that of another conservation organization or regional Alliance;
3. The results of monitoring visits will be documented in writing;
4. Monitoring documents and records will be backed-up and stored in a secure location;
5. Monitoring of Ecogifts will include confirmation that the present use of the property is consistent with that at the time of the donation;
6. Monitoring documentation relating to Ecogifts will be made available to Environment Canada upon request.

It is intended that these points be a starting point for the development of minimum guidelines that will be adopted by land trust organizations. As these guidelines are to apply to the land trust community on a national level, input from individual land trusts throughout Canada to improve, add, and/or clarify the above points was seen as an essential component in their development and adoption.

## **Strategies for the Development of Monitoring Guidelines: “The Roadmap”**

### **The development of monitoring guidelines**

The six drafted guidelines outlined above offer a significant starting point for potential minimum requirements that land trust organizations should formally adopt and adhere to once finalized. Additional input should be sought to fine-tune these guidelines. Once they are approved and integrated, it could be required that all land trusts who wish to participate in the Ecological Gifts program adopt these standards through a formal resolution from their organization's board.

### **Strategy for encouraging the adoption of monitoring standards**

As mentioned above, if land trusts wish to participate in the Ecological Gifts program, it could be made necessary for them to formally “sign-off” and adopt these standards. As these standards are minimum requirements and will generally not require significant changes to the operations of most land trusts, it is hoped that there will be very little resistance to adopting these standards. As well, the regional Alliances would encourage the adoption of these guidelines, along with the "Standards and Practices" currently suggested by LTABC, OLTA, and RMN. In addition these regional alliances have and should continue to provide training and resources on monitoring practices and protocols.

### **A reporting framework for Environment Canada and for the land trust community**

As holding the public’s trust through the perpetual protection of lands and sensitive areas requires a strong professional accountability, it is therefore necessary to be able to qualify this by having sufficient documentation demonstrating this capacity. The basis of this is the production and safe long-term storage of important documentation, including covenant/ easement/ servitudes, baseline inventory and monitoring report documents. Items 3, 5, and 6 in the list of guidelines address this issue by requiring land trusts to document all monitoring site visits in writing, to ensure that they will be backed-up and stored in a secure location, and to ensure that they can and will be made available to Environment Canada upon request. These standards were identified as sufficient to meet Environment Canada’s requirements.

## **Moving Forward**

1. Send out copies of this report to affiliated land trust organizations to seek feedback and input regarding the proposed guidelines.
2. Seek input from others with a vested interest in Ecogift monitoring.
3. Revise draft guidelines based on feedback and suggestions.
4. Work towards addressing financial and conceptual concerns regarding meeting the requirements of the proposed guidelines (e.g. creating alternative storage locations for important documentation)
5. Create and approve a standardized “Guidelines for Monitoring” form for land trust adoption.

## **Potential Financial Assistance**

As financial resources to protect Canada's natural and cultural heritage through the negotiation, holding, monitoring and management of these lands is currently limited, both in policy and in practical funding programs, the following is suggested:

1. Provide funding to regional organizations to assist with further development of the proposed monitoring guidelines.
2. Provide funding to regional land trust alliances, and resource and capacity building organizations to help provide resources and monitoring and organizational training.
3. Provide funding programs for individual land trusts to pay for costs to attend training workshops.
4. Provide funding programs to assist land trusts for annual monitoring activities, staff time to document, maintain and update records, and pay for storage costs.

## SECTION 2

# BACKGROUND & SUMMARY OF RESULTS OF THE NATIONAL ECOGIFT MONITORING SURVEY

### Survey Background

This document summarizes the results of a national survey which gathered information related to the monitoring of land acquisitions and conservation covenants/easements/servitudes, with particular emphasis on the monitoring practices related to properties protected through Environment Canada's Ecological Gifts program.

The survey was designed and implemented through a network of 5 regional organizations/representatives throughout Canada. Section 2 summarizes quantitative information for the entire country and individual regional results are located in Appendix A.

### Overview

Nationally, 65 organizations completed and/or participated in the survey. Of these, 33 organizations have received lands or interest in lands through the Ecological Gifts program. See the “Completeness of Survey” section below for more details related to this survey and its respondents.

Approximately 93% of all survey respondents monitored full title properties on a regular basis, usually once or twice annually, and approximately 95% monitored their conservation easements, covenant or servitude properties regularly. Of the four respondents who did not monitor their fee simple holdings 2 explained that they were adequately managing these lands in relation to their management plans (although not with formal monitoring procedures), the third was a recent acquisition (monitoring for that property had yet to begin) and no reason was provided by the fourth. 94% of the organizations that held Ecogifts saw monitoring as either crucial or very important. The remaining 6% (2 organizations) felt it was “somewhat important”. Generally methods for monitoring Ecogift properties did not vary significantly from methods used to monitor non-Ecogifts. The exception was Ontario, where half of the Ecogift recipients said that they did monitor their Ecogifts differently. The differences in monitoring practices ranged from increased photo monitoring to conducting drive-by visits only (one organization). Of those land trusts who responded, 69% used a documented methodology to monitor their Ecogifts. Most organizations (77%) were willing to share these methods/protocols with us. Again details can be found in the individual regional results in Section 2. Those organizations that monitor their holdings regularly, but do not use a documented protocol, often adapt and reference existing protocols such as those offered through EMAN, NCC, Ontario Heritage Foundation (OHF), TLC, LTABC and others to suit their particular monitoring requirements.

The type of monitoring that land trusts perform tend to focus on a combination of both ecological and compliance monitoring. The more established/structured organizations

tend to focus on compliance monitoring on lands protected by a covenant or easement agreement, and lean towards ecological monitoring on lands that they own title to and/or are conducting rehabilitation/restoration activities on. However, there are many exceptions and different aspects to this question, one of which is the existence of co-covenant holders. For example, the larger and better funded co-holder will tend to take on the responsibility for the formal monitoring aspects of a covenant/easement, while the local co-holder will be the “eyes and ears” watching for improper land use and potential violations and infractions to the agreement. Management plans also influence how a property is monitored. The survey indicates that 72% of Ecogift holders develop management plans on full title Ecogifts and that 78% of all respondents develop them for their acquired properties (non-Ecogifts).

The training of site inspectors/monitors varied extensively between different land trusts. However, with only four exceptions, training did not vary from conservation covenants, easements or servitudes versus full title properties whether they were certified ecological gifts or not. Closely related to training, 62% of all respondents indicated that they were aware of resources that may be helpful to their monitoring practices, and 86% of them used these resources to some extent.

The filing, storage and security of official monitoring documents was fairly inconsistent. Several organizations were very diligent about the filing and safekeeping of relevant documentation, while others may not have even recorded the results of their monitoring visits (see regional results). Just as inconsistent was the adoption of formal Standards & Practices on a national scale. Ontario is the only province/survey region where all respondents were either working towards adopting or have adopted (OLTA’s) formal Standards and Practices. In BC, five land trusts have adopted the BCLTA Standards and Practices, with others working toward them. Quebec also has S & P’s. In contrast, no formal Standards & Practices exist in Alberta and Saskatchewan.

#### General Overview of Existing Protocols and Methodologies

With the exception of the newly developed NCC/HAT monitoring protocol in BC, most of the monitoring methodologies reviewed were fairly similar in concept. The instructions and site inspection forms are generally clearly laid out, often directing the monitor/inspector to refer to the baseline inventory, the management goals and previous monitoring reports. Once familiar with the specific features particular to the site, they would then be prepared to start the field inspection with a simple form in hand to report on various attributes of the protected area. Aspects such as land use, new man-made and natural alterations, violations, specific monitoring requirements etc., often with suggestions of what to look for under or related to these headings are categorized on the forms. The NCC/HAT protocol is a much more extensive monitoring survey which in addition to common compliance related monitoring procedures, includes an in-depth ecological assessment similar to a baseline inventory.

### Completeness of Survey

Survey results are based solely on land trusts that owned or covenanted lands. Complete data was not made available by all regional representatives regarding the number of organizations contacted versus the number of organizations who responded to and completed the survey, or met the requirements to participate in the survey (i.e. they were landholders or covenant/easement/servitude holders). As well, not all respondents were able to answer all survey questions. For example a survey respondent may not know the answer to the question, or the question may not have been applicable to their situation. In addition several land trust organizations were not contacted by the surveyors for various reasons ranging from emergency situations to land trusts not returning calls. Consequently, these types of situations are reflected in the results by answers such as “not applicable” (n/a), “no response” (n/r), as numbers not “adding up”, or by certain land trusts not being included in the results. Survey results from the Nature Conservancy of Canada contacted within each region are incorporated in that region's results. However the national office also surveyed their own monitors, and these have not been included in the results of this report, or in the national summary of results as they arrived too late to be integrated. Instead they are appended to this document - Appendix A.

To reiterate, the results of this survey only represent those land trusts that qualified and responded to the survey and do not represent all land trusts who own lands, or hold covenants, easements or servitudes. It does however provide an excellent representation of current land trust practices by providing very relevant information for the majority of active land trusts and conservancies.

## **SECTION 3**

### **SURVEY RESULTS**

#### SUMMARY OF NATIONAL RESULTS

This section is a compilation of the summary data from all 5 regional survey coordinators, making up a national summary of monitoring activities. As certain survey questions called for explanations and details related to land trust activities, the answers to these questions were generally subjective, and could be influenced by the interpretation of the question and various other factors. Therefore only quantitative data is reported accurately in this section. However, common/repeated subjective responses will be included where possible. A summary of individual comments can be found in the in the regional results below.

#### National Summary

Total Completed Surveys: 65

Total Land Trusts with Ecogifts: 33

	<b>Survey Question</b>	<b>Summary of Responses</b>
1a	How many conservation covenants/easements/servitudes does your organization hold and apx. What is their total area?	618 47,493.82 ha
1b	Of these covenants, easements and servitudes how many are certified as Ecological Gifts, and what is their total area?	54 6,491.6 ha
1c	How many properties do you own the title to Land, and what is their total area	1565 161,629.8 ha
1d	How many and what area of your full title holdings are certified as Ecological Gifts by Environment Canada?	100 5,348.8 ha
1e	Do you co-hold your lands or covenants/easements with another conservation organization?	Always: 7 Generally: 9 Rarely: 14 Never: 23
2a	Do you monitor your full title holdings?	Yes: 53 No: 4
2b	If yes, how often?	Twice yearly: 20 Once yearly: 18 Every Other year: 4 Every Five years: 3
2c	If no, please give reasons	(See individual regions)
3a	Do you monitor your covenants/easements/servitudes?	Yes: 42 No: 2
3b	If yes, how often?	Twice yearly: 6 Once yearly: 32 Every Other year: 1

3c	If no, please give reasons.	Every Five years: 1 (See individual regions)
4	How important do you consider the practice of monitoring your full title properties and/or easement/covenant/servitudes that are certified as Ecological Gifts by Environment Canada to be?	Crucial: 14 Very Important: 17 Somewhat Important: 2 Not Very Important: 0 Not Needed: 0
5a	Do your methods of monitoring non-Ecogift land holdings and conservation covenants/easements/servitudes differ from those used to monitor your full title holdings certified as Ecogifts?	No: 23 Yes: 7
5b	If yes, please explain the differences and provide documentation where existing.	(See individual regions)
6a	Does your organization use a documented methodology or protocol to monitor your Ecogifts?	Yes: 22 No: 10
6b	If yes: Would you be willing to provide us with a copy of the relevant documentation (forms, templates, requirements, etc.)?	Yes: 20 No: 6
6c	If no (to "a" above): Can you give your reasons? If you are willing to share your methodology, but with restricted use, please note this restriction.	(See individual Regions)
7a	What type of monitoring does your organization perform?	Ecological: 6 Compliance: 18 Both: 40
7b	Please describe or provide details	The most common response was that Easements/Covenants were monitored primarily for compliance, and that full title properties were monitored for the ecology or both. <b>(See individual Regions)</b>
8.	What are five factors that your organization considers top priority when monitoring one of your protected sites?	(See individual Regions)
9.	Are landowners regularly involved or present during regular monitoring activities (covenants/easements/servitudes)?	Always: 13 Generally: 19 Rarely: 6 Never: 6
10	Does your organization develop management plans for your full title properties?	~
10a	For your Ecogifts?	Yes: 21 No: 8
10b	For your Non-Ecogifts	Yes: 40 No: 11
10c	Please Provide Details	(See Individual Regions)
11a	What training, if any, do those who perform on-site monitoring for your organization have?	(See Individual Regions)

11b	Do monitors receive this same training for both non-Ecogifts as well as certified Ecogifts?	Yes: 22 No: 0
11c	If no, how does the training vary?	(See Individual Regions)
11d	Is the same type of training provided for both full title, and for conservation covenant/easement/servitude monitoring?	Yes: 24 No: 4
11e	If no please provide details	(See Individual Regions)
11f	If another organization provides the training services, please provide their contact information and relationship.	(See Individual Regions)
12a	Are you aware of any resources that offer templates, information, guidelines, protocols, methods or background related to the monitoring of land or conservation covenants/easements/servitudes?	I am aware: 45 I am not aware: 20
12b	Can you provide any details	(See Individual Regions)
12c	Do you use any of these resources?	Yes: 37 No: 6
12d	Extent of use:	(See individual Regions)
13a	How does your organization keep track of monitoring details such as past monitoring visits, results, future monitoring obligations etc?	Paper files: 47 Computer files: 15 Database: 10
13b	Other	(See Individual Regions)
14	Please explain if your organization has any added security measures for the safekeeping of relevant documentation and schedules (e.g. backups, storage locations, passwords etc.)	(See Individual Regions)
15a	Has your organization agreed to bring your practices into compliance with any formal "Standards and Practices" related to the operations or your organization?	Yes: 22 To Some Extent: 10 No: 28
15b	If yes can you provide some details?	(See Individual Regions)
15c	If No, why not?	(See Individual Regions)
15d	Not sure: unfamiliar with Standards and Practices	13
16a	Are you aware of any services or products available that may help you monitor and/or keep track of the protected lands in your region?	Yes: 37 No: 23
16b	If yes, please provide some details	(See Individual Regions)

## SECTION 3: SUMMARY OF REGIONAL RESULTS

### Section 2.1.1: British Columbia

Completed Surveys: 16

Land Trusts with Ecogifts: 6

	Survey Question	Summary of Responses
1a	How many conservation covenants/easements/servitudes does your organization hold and apx. What is their total area?	174 5,701.2 ha
1b	Of these covenants, easements and servitudes how many are certified as Ecological Gifts, and what is their total area?	5 538.5 ha
1c	How many properties do you own the title to land, and what is their total area	447 52,702.65 ha
1d	How many and what area of your full title holdings are certified as Ecological Gifts by Environment Canada?	28 861.13 ha
1e	Do you co-hold your lands or covenants/easements with another conservation organization?	Always: 7 Generally: 5 Rarely: 0 Never: 2 N/A or Other: 2
2a	Do you monitor your full title holdings?	Yes: 8 No: 2
2b	If yes, how often?	Twice Yearly: 3 Once yearly: 3 Every Other Year: 1 Every Five Years: 0 More often: 1
2c	If no, please give reasons	-Manage, rather than monitor full title Acquisitions -Informal monitoring procedure, and will abide by Management Plans and work to acceptable guidelines.
3a	Do you monitor your covenants/easements/servitudes?	Yes: 13 No: 0
3b	If yes, how often?	Twice yearly: 1 Once yearly: 11 Every Other Year: 1 Every Five Years: 0
3c	If no, please give reasons.	N/A
4	How important do you consider the practice of monitoring your full title properties and/or easement/covenant/servitudes that are certified as Ecological Gifts by Environment Canada to be?	Crucial: 2 Very Important: 4 N/a: 1 (not yet monitored)

5a	Do your methods of monitoring non-Ecogift land holdings and conservation covenants/easements/servitudes differ from those used to monitor your full title holdings certified as Ecogifts?	No: 6 Yes: 1
5b	If yes, please explain the differences, and provide documentation where existing.	<b>Covenants</b> Use Methods of Co-holder
6a	Does your organization use a documented methodology or protocol to monitor your Ecogifts?	Yes: 5 No: 2
6b	If yes: Would you be willing to provide us with a copy of the relevant documentation (forms, templates, requirements, etc.)?	Yes: 5 No: 0
6c	If no (to “a” above): Can you give your reasons? If you are willing to share your methodology, but with restricted use, please note this restriction.	
7a	What type of monitoring does your organization perform?	Ecological: 1 Compliance: 4 Both: 11
7b	Please describe or provide details	-Generally, compliance to terms of Ecogift or covenant: Ecological in terms of rehabilitation or succession based on baseline inventory. -Otherwise, ranging from intensive photo monitoring plots to casual walkthroughs or observations
8.	What are five factors that your organization considers top priority when monitoring one of your protected sites?	See “Section 3.1.2” for list of priorities.
9.	Are landowners regularly involved or present during regular monitoring activities (covenants/easements/servitudes)?	Always: 10 Generally: 4 Rarely: 1 Never: 1
10	Does your organization develop management plans for your full title properties?	
10a	For your Ecogifts?	Yes: 4 No: 2 Unsure: 1
10b	For your Non-Ecogifts (All Respondents)?	Yes: 8 No: 3 N/A; N/R: 2
10c	Please Provide Details	<ul style="list-style-type: none"> <li>➤ Covenant terms supersede management plan.</li> <li>➤ Requirement of lease and responsibility of Regional District (owner)</li> <li>➤ Broad plans only: 2</li> <li>➤ Existing and developing for new properties: 2</li> </ul>

- Seen as important for overall direction
  - Seen as not necessary as the donor still lives there.
  - Required where any management issues exist, otherwise interim stewardship will be developed.
  - **Drafted at acquisition and completed later.**
- 11a What training, if any, do those who perform on-site monitoring for your organization have?
- Degree: 9 (B.Sc, RPBio, etc.)
  - LTABC Workshops: 4
  - Forestry: 2
  - Environmental/Land mngt dip/degree: 6
  - Related experience.
  - NCC training: 1
- 11b Do monitors receive this same training for both non-Ecogifts as well as certified Ecogifts? Yes: 7  
No: 0
- 11c If no, how does the training vary?
- 11d Is the same type of training provided for both full title, and for conservation covenant/easement/servitude monitoring? Yes: 5  
No: 1  
N/A; N/R or no training: 11
- 11e If no please provide details  
Monitors for Covenants should have training and experience on monitoring covenants specifically. A little more specialized
- 11f If another organization provides the training services, please provide their contact information and relationship.
- Rob Knight
  - LTA Course
- 12a Are you aware of any resources that offer templates, information, guidelines, protocols, methods or background related to the monitoring of land or conservation covenants/easements/servitudes? Aware: 15  
Not Aware: 1
- 12b Can you provide any details
- LTABC: 8
  - Larger co-holder and land trusts: 5
  - Forestry information: 1
  - **Standards and Practices: 1**
- 12c Do you use any of these resources? Yes: 12  
No: 2  
N/A: 3
- 12d Extent of use:
- Use as reference adapt: 3
  - Familiarity: 4
  - Use the methods: 3
  - Don't use them: 2

- 13a How does your organization keep track of monitoring details such as past monitoring visits, results, future monitoring obligations etc?      ➤ Paper: 12  
 ➤ Computer: 3  
 ➤ Both: 4 (but most to some degree)  
 ➤ In head: 1
- 13b Other      ➤  
 Methods include annual reports, files kept by landowners and coholders, files kept with covenant documents, action items filed separately, note keeping etc.
- 14 Please explain if your organization has any added security measures for the safekeeping of relevant documentation and schedules (e.g. backups, storage locations, passwords etc.)      ➤ Fireproof cabinet/locker: 2  
 ➤ Off-site location (digital and/or paper): 4  
 ➤ Locked location: 1  
 ➤ None: 8  
 ➤ **Digital backup: 4**
- 15a Has your organization agreed to bring your practices into compliance with any formal “Standards and Practices” related to the operations or your organization?      Yes: 5  
 To Some Extent: 4  
 No: 6
- 15b If yes can you provide some details?      If not adopted or working towards LTABC's, internal policy is seen as just as good or better.
- 15c If No, why not?      ➤ Current practices are sufficient or exceed standards  
 ➤ Small organization, can't afford insurance (possibly developed informal standards and practices)  
 ➤ **Time and Money**
- 15d Not sure: unfamiliar with Standards and practices      0
- 16a Are you aware of any services or products available that may help you monitor and/or keep track of the protected lands in your region?      Yes: 11  
 No: 4
- 16b If yes, please provide some details      ➤ LTABC Lands In Trust Registry: 9  
 ➤ **Resources offered by larger land trusts such as ITF, NCC, DU**

### Section 2.1.2: List Of Monitoring Priorities In BC

- ⇒ Impact on vegetation on terms of related to permissible uses
- ⇒ Knowing restrictions of covenant
- ⇒ Damage to environment
- ⇒ Information is shared with applicable parties (i.e. co holders, landowners)
- ⇒ Owner participate in monitoring
- ⇒ Land owner contact
- ⇒ Ecosystem health
- ⇒ Are plant and tree species distributions present
- ⇒ Any changes to management plan required? E.g. baseline done properly
- ⇒ Thorough/complete survey to examine photos, and enhancements, find property pins
- ⇒ Any visible or quantifiable damage? E.g. timber, garbage (compliance) boundary, access
- ⇒ Good baseline to work against
- ⇒ Qualification of inspector
- ⇒ Severity of breach if there is one
- ⇒ Compliance to licensed use of land
- ⇒ Activities on adjacent lands eg. Subdivision

## Section 2.2.1: Prairies, Summary Of Results

Completed Surveys: 9

Land Trusts with ecogifts: 6

	Survey Question	Summary of Responses
1a	How many conservation covenants/easements/servitudes does your organization hold and apx. What is their total area?	154 13,273.7 ha
1b	Of these covenants, easements and servitudes how many are certified as Ecological Gifts, and what is their total area?	16 3,270.7ha
1c	How many properties do you own the Title to Land, and what is their total area	393 77,332.2 ha
1d	How many and what area of your full title holdings are certified as Ecological Gifts by Environment Canada?	31 2,834.4 ha
1e	Do you co-hold your lands or covenants/easements with another conservation organization?	Always: 0 (Against Alberta legislation) Generally: 1 Rarely: 1 Never: 6
2a	Do you monitor your full title holdings?	Yes: 7 No: 0
2b	If yes, how often?	Twice Yearly: 0 Once yearly: 3 Every Other Year: 0 Every Five Years: 2 “As Required”: 1 Thorough every 5 years and quick visit annually. 1 Monthly+: 1
2c	If no, please give reasons	N/a
3a	Do you monitor your covenants/easements/servitudes?	Yes: 6 No: 0
3b	If yes, how often?	Twice yearly: 1 Once yearly: 4 Every Other Year: 0 Every Five Years: 1 (subjective)
3c	If no, please give reasons.	N/A
4	How important do you consider the practice of monitoring your full title properties and/or easement/covenant/servitudes that are certified as Ecological Gifts by Environment Canada to be?	Crucial: 3 Very Important: 4 (No distinction made between ecogifts and non-ecogifts in

		<i>survey summary)</i>
5a	Do your methods of monitoring non-Ecogift land holdings and conservation covenants/easements/servitudes differ from those used to monitor your full title holdings certified as Ecogifts?	No: 4 Yes: 0
5b	If yes, please explain the differences, and provide documentation where existing.	N/A
6a	Does your organization use a documented methodology or protocol to monitor your Ecogifts?	Yes: 4 No: 2
6b	If yes: Would you be willing to provide us with a copy of the relevant documentation (forms, templates, requirements, etc.)?	Yes: 4 No: 1
6c	If no (to “a” above): Can you give your reasons? If you are willing to share your methodology, but with restricted use, please note this restriction.	“Uncomfortable with the concept”
7a	What type of monitoring does your organization perform?	Ecological: 1 Compliance: 0 Both: 8
7b	Please describe or provide details	<ul style="list-style-type: none"> <li>➤ Ecosystem management and species health (e.g. controlled burns and exotics)</li> <li>➤ Compliance with an eye on ecological (2)</li> <li>➤ More important to monitor long term trends rather than year to year</li> <li>➤ Board members are landowners, so monitoring is a little redundant?</li> <li>➤ Ecological/vegetative plot sampling</li> <li>➤ Mapping for exotics and vegetation (2)</li> <li>➤ Qualitative population surveys</li> <li>➤ Mainly landowner relationship with compliance aspect mandatory</li> <li>➤ More interest in land acquisition due to high costs involved with monitoring easements.</li> <li>➤ Too much red tape involved with easements and potential conflicts when enforced</li> </ul>
8.	What are five factors that your organization considers top priority when monitoring one of your protected sites?	See “Section 3.2.2” for list of priority factors.
9.	Are landowners regularly involved or present during regular monitoring activities (covenants/easements/servitudes)?	Always: 2 Generally: 1 Rarely: 1 Never: 1
10	Does your organization develop management plans for your full title properties?	

10a	For your Ecogifts?		Yes: 2 No: 2
10b	For your Non-Ecogifts (All Respondents)?		Yes: 5 No: 1 (depending on property)
10c	Please Provide Details	<ul style="list-style-type: none"> <li>➤ Often developed for strict management guidelines e.g. grazing management.</li> <li>➤ Trends important- seen as dependant on seasonal and climate</li> <li>➤ Depends on property. No standard or policy: 2</li> <li>➤ Determine management activities through discussions -&gt; Informal</li> <li>➤ Not Law - Difficult to enforce. Hard to develop when property looks good.</li> </ul>	
11a	What training, if any, do those who perform on-site monitoring for your organization have?	<ul style="list-style-type: none"> <li>➤ Knowledge of Biology: 3</li> <li>➤ University/College degrees: 3 + 7= 10</li> <li>➤ Related Knowledge: 3</li> <li>➤ Stewards: 1</li> <li>➤ Inter-org trained.</li> </ul>	
11b	Do monitors receive this same training for both non-Ecogifts as well as certified Ecogifts?		Yes: 3 No: 0
11c	If no, how does the training vary?		N/A
11d	Is the same type of training provided for both full title, and for conservation covenant/easement/servitude monitoring?		Yes: 5 No: 0
11e	If no please provide details		
11f	If another organization provides the training services, please provide their contact information and relationship.	<ul style="list-style-type: none"> <li>➤ Cows and Fish</li> <li>➤ Alberta Government annual training re grasslands</li> <li>➤ ACA</li> </ul>	
12a	Are you aware of any resources that offer templates, information, guidelines, protocols, methods or background related to the monitoring of land or conservation covenants/easements/servitudes?		Aware: 5 Not Aware: 3
12b	Can you provide any details	<ul style="list-style-type: none"> <li>➤ LTA US</li> <li>➤ Internet</li> <li>➤ Land Trust Conferences and Seminars</li> <li>➤ Public Lands Branch</li> <li>➤ Barry Adams. Barge Craig</li> <li>➤ Cows &amp; Fish</li> <li>➤ Saskatchewan Range assessment. Courses at U of Sask.</li> <li>➤ Environment Canada</li> </ul>	
12c	Do you use any of these resources?		Yes: 4

		No: 1
12d	Extent of use: <ul style="list-style-type: none"> <li>➤ Adapt or apply to their properties: 2</li> <li>➤ Extensive Internet use: 1</li> <li>➤ Try to attend Conferences</li> <li>➤ Sometimes go to EC course</li> </ul>	
13a	How does your organization keep track of monitoring details such as past monitoring visits, results, future monitoring obligations etc?	<ul style="list-style-type: none"> <li>➤ Paper: 8</li> <li>➤ Computer: 4</li> <li>➤ Database: 3</li> </ul>
13b	Other	GIS
14	Please explain if your organization has any added security measures for the safekeeping of relevant documentation and schedules (e.g. backups, storage locations, passwords etc.)	<ul style="list-style-type: none"> <li>➤ Computer Backups</li> <li>➤ Secondary locations</li> <li>➤ Fireproof cabinets</li> <li>➤ Duplicates</li> <li>➤ "Too much security"</li> </ul>
15a	Has your organization agreed to bring your practices into compliance with any formal "Standards and Practices" related to the operations or your organization?	Yes: 0 To Some Extent: 0 No: 8
15b	If yes can you provide some details?	N/A
15c	If No, why not?	<ul style="list-style-type: none"> <li>➤ No Alberta Standards &amp; Practices</li> <li>➤ No Saskatchewan Standards &amp; Practices</li> <li>➤ "Good idea though"</li> </ul>
15d	Not sure: unfamiliar with Standards and practices	5
16a	Are you aware of any services or products available that may help you monitor and/or keep track of the protected lands in your region?	Yes: 5 No: 2
16b	If yes, please provide some details	<ul style="list-style-type: none"> <li>➤ Digital Photos</li> <li>➤ GPS</li> <li>➤ Air photos</li> <li>➤ "Public Lands Program</li> <li>➤ Consultants</li> <li>➤ Computer Software</li> <li>➤ David Pyke's "Rangeland Health Indicators."</li> <li>➤ Airplanes for compliance monitoring</li> <li>➤ They work with DU and others and just keeping in touch and talking to others is a great resource.</li> </ul>

### Section 2.2.2: Monitoring Priorities For The Prairie Region

- ⇒ Water levels and/or quality (2)
- ⇒ Engineering inspections of control structures
- ⇒ Compliance (4)
- ⇒ For habitat maintenance
- ⇒ Landowner relations/education (4)
- ⇒ Problems with new/second generation landowners
- ⇒ The health and long term viability of the site
- ⇒ Trend changes - if there is a downward trend in the land, that might take years to become obvious. When the trend is downward, they would then discuss it with the landowner and see if he could upgrade. Flexibility is important to them.
- ⇒ To see if the grass is diverse or not diverse.
- ⇒ Surveying vegetation and wildlife.
- ⇒ Rare species (2)
- ⇒ Invasive species (4)
- ⇒ Species Diversity
- ⇒ Quantitative information on indicator species of good quality natural vegetation.
- ⇒ Collection of qualitative lists for birds, mammals, and insects. Have a natural history society and they incorporate that data into the report form
- ⇒ Riparian and wetland health (2)
- ⇒ Range health and range condition of native pasture
- ⇒ On cultivated lands - sediment loading going into creek and ensuring that there is not fall tillage or that it is into permanent cover.
- ⇒ Fish management on two parcels
- ⇒ Fire hazard
- ⇒ Fence upkeep
- ⇒ Impact and Compliance of permitted uses (i.e. Grazing and Logging): 2
- ⇒ Clean up debris
- ⇒ Habitat development
- ⇒ Reforestation/renaturalization
- ⇒ Doing the work manually with no herbicides
- ⇒ Maintain a certain degree of solidarity over the land because they don't want illegal use or vandalism. They follow up on reports from local branches about fences being torn down. This is more an immediacy thing than a priority thing.
- ⇒ Ensuring that ecological integrity of land is maintained.
- ⇒ A way of seeing what's happening in the surrounding landscape and possible opportunities for extension of current project.
- ⇒ Potential opportunities to get local clubs involved, maybe with interest in food plots for extending winter range of ungulates, bird boxes, etc.

### Section 2.3.1: Ontario Summary Of Results

Completed Surveys: 14

Land Trusts with Ecogifts: 10

	Survey Question	Summary of Responses
1a	How many conservation covenants/easements/servitudes does your organization hold and apx. What is their total area?	63 2,224.9 ha
1b	Of these covenants, easements and servitudes how many are certified as Ecological Gifts, and what is their total area?	25 1,274.4 ha
1c	How many properties do you own the title to land, and what is their total area	215 6,803 ha
1d	How many and what area of your full title holdings are certified as Ecological Gifts by Environment Canada?	15 337.3 ha
1e	Do you co-hold your lands or covenants/easements with another conservation organization?	Always: 0 Generally: 1 Rarely: 5 Never: 8
2a	Do you monitor your full title holdings?	Yes: 14 No: 0
2b	If yes, how often?	Twice Yearly: 5 Once yearly: 6 Every Other Year: 1 Every Five Years: 0 “Monthly”: 2
2c	If no, please give reasons	N/A
3a	Do you monitor your covenants/easements/servitudes?	Yes: 12 No: 0
3b	If yes, how often?	Twice yearly: 2 Once yearly: 10 Every Other Year: 0 Every Five Years: 0
3c	If no, please give reasons.	N/A
4	How important do you consider the practice of monitoring your full title properties and/or easement/covenant/servitudes that are certified as Ecological Gifts by Environment Canada to be?	Crucial: 5 Very Important: 4 Somewhat: 1
5a	Do your methods of monitoring non-Ecogift land holdings and conservation covenants/easements/servitudes differ from those used to monitor your full title holdings certified as Ecogifts?	No: 5 Yes: 5
5b	If yes, please explain the differences,	➤ Drive-by monitoring seen as sufficient

	and provide documentation where existing.	<ul style="list-style-type: none"> <li>➤ Tailored to specific needs</li> <li>➤ Additional work being done</li> <li>➤ Increase photo documentation</li> <li>➤ Higher level of monitoring</li> <li>➤ All monitored for compliance with standardized form</li> </ul>
6a	Does your organization use a documented methodology or protocol to monitor your Ecogifts?	Yes: 7 No: 2
6b	If yes: Would you be willing to provide us with a copy of the relevant documentation (forms, templates, requirements, etc.)?	Yes: 6 No: 1
6c	If no (to “a” above): Can you give your reasons? If you are willing to share your methodology, but with restricted use, please note this restriction.	<ul style="list-style-type: none"> <li>➤ Not Yet Developed</li> <li>➤ Still Adapting</li> <li>➤ Responsibility of Co-holder</li> </ul>
7a	What type of monitoring does your organization perform?	Ecological: 3 Compliance: 5 Both: 5
7b	Please describe or provide details	<ul style="list-style-type: none"> <li>➤ Compliance to management plan</li> <li>➤ Ecogifts: Compliance; Non Ecogifts: as needed</li> <li>➤ Ecological on baseline and compliance on easement agreement</li> <li>➤ EMAN protocols, annual visits, work parities, inspections etc.</li> <li>➤ Primarily Compliance</li> <li>➤ Degradation due to human use/campers</li> </ul>
8.	What are five factors that your organization considers top priority when monitoring one of your protected sites?	See “Section 3.3.2” for list of priority factors.
9.	Are landowners regularly involved or present during regular monitoring activities (covenants/easements/servitudes)?	Always: 1 Generally: 8 Rarely: 1 Never: 1
10	Does your organization develop management plans for your full title properties?	
10a	For your Ecogifts?	Yes: 7 No: 2
10b	For your Non-Ecogifts (All Respondents)?	Yes: 12 No: 2
10c	Please Provide Details	<ul style="list-style-type: none"> <li>➤ In development/intention to develop: 6</li> <li>➤ Simple Standard Format</li> <li>➤ Ecogifts: Monitoring for baseline conditions. Non-EG: annual management plans developed.</li> <li>➤ To regulate/manage appropriate land use: 1</li> </ul>

- Within 3 to 12 months
  - In conjunction with partners
- 11a What training, if any, do those who perform on-site monitoring for your organization have?
  - Professional degrees etc: 4
  - Volunteers w/ board member: 1
  - Applicable background and Training: 3
  - None or unsure: 2
  - On-site or common sense: 2
- 11b Do monitors receive this same training for both non-Ecogifts as well as certified Ecogifts? Yes: 7  
No: 0
- 11c If no, how does the training vary? N/A
- 11d Is the same type of training provided for both full title, and for conservation covenant/easement/servitude monitoring? Yes: 8  
No: 1
- 11e If no please provide details Easement for compliance, Title for ecology and management first
- 11f If another organization provides the training services, please provide their contact information and relationship.
  - OLTA workshops & materials
  - MNR – exploring partnership
- 12a Are you aware of any resources that offer templates, information, guidelines, protocols, methods or background related to the monitoring of land or conservation covenants/easements/servitudes? Aware: 10  
Not Aware: 5
- 12b Can you provide any details
  - NCC Ontario Region has templates
  - Ministry of Natural Resources, Ontario Heritage Foundation, NCC, etc.
  - Ecological Monitoring Assessment Network (EMAN)
  - OLTA workshops (e.g., Environmental Audits, Ontario Heritage Foundation Baseline Monitoring Guidelines, EMAN Resources)
  - ONTA Land Securement Manual; Conservation Easement Guide (LTA); LTA Standards and Practices Guidebook; LTA Exchange articles; LTA Rally Workbook presentations; other easement materials
  - BC LTA and US LTA
  - NCC Training Manual
- 12c Do you use any of these resources? Yes: 10  
No: 0
- 12d Extent of use:
  - Use when property under certain agreements
  - Familiar/looked over or "small amount": 2
  - Developing methods/protocols based on existing (EMAN, OHF) ➤
  - Sporadic. Need to establish clear protocols and volunteer

- training
- Consult resources as required or as issues arise: 2
  - OHF has taken lead role to supply templates etc
- 13a How does your organization keep track of monitoring details such as past monitoring visits, results, future monitoring obligations etc?
- Paper: 15 (all)
  - Database: 3
  - Computer: 5
  - Auto-reminder: 1
  - All/combo: 8
- 13b Other GIS
- 14 Please explain if your organization has any added security measures for the safekeeping of relevant documentation and schedules (e.g. backups, storage locations, passwords etc.)
- Safe deposit box: 2
  - Backups/duplicates: 2
  - Locked cabinet: 1
  - Other alternate location: 2
- 15a Has your organization agreed to bring your practices into compliance with any formal “Standards and Practices” related to the operations or your organization?
- Yes: 12  
To Some Extent: 3  
No: 0
- 15b If yes can you provide some details?
- Adopted: 5
  - Working Towards adoption: 4
  - In principle with flexibility: 1
- 15c If No, why not? N/A
- 15d Not sure: unfamiliar with Standards and practices 0
- 16a Are you aware of any services or products available that may help you monitor and/or keep track of the protected lands in your region?
- Yes: 6  
No: 8
- 16b If yes, please provide some details
- EMAN
  - GIS and data sharing
  - Local Conservation Authority staff monitor other lands in the vicinity and will hopefully report anything unusual relating to lands.
  - GPS
  - NHIC

### Section 2.3.2 List Of Monitoring Priorities For Ontario

- ⇒ Human Safety: 4
- ⇒ Human Impacts: 4
- ⇒ Compliance: 3
- ⇒ Ecology: 2
- ⇒ Subdivision: 1
- ⇒ Invasive species: 2
- ⇒ Access related impacts: 1
- ⇒ Landowners/custodian relationship: 5
- ⇒ Ecology: 2
- ⇒ Structures and development: 2
- ⇒ Species at risk
- ⇒ Rare Species Status: 1
- ⇒ Resource extraction: 1
- ⇒ Natural impacts: 1
- ⇒ Litter: 1
- ⇒ Invasive Species.: 1
- ⇒ Poaching and Impacts: 1
- ⇒ Stewardship Plan: 1
- ⇒ Clear Permanent documentation: 1
- ⇒ Ecological and habitat disturbance: 3
- ⇒ Vehicle Damage:

## Section 2.4.1: Quebec Monitoring Summary Results

Completed Surveys: 21

Land Trusts with Ecogifts: 7

	Survey Question	Summary of Responses
1a	How many conservation covenants/easements/servitudes does your organization hold and apx. What is their total area?	175 22,887.6 ha
1b	Of these covenants, easements and servitudes how many are certified as Ecological Gifts, and what is their total area?	0 0 ha
1c	How many properties do you own the Title to Land, and what is their total area	216 13,554.6.6 ha
1d	How many and what area of your full title holdings are certified as Ecological Gifts by Environment Canada?	13 111 ha
1e	Do you co-hold your lands or covenants/easements with another conservation organization?	Always: 0 Generally: 2 Rarely: 6 Never: 4
2a	Do you monitor your full title holdings?	Yes: 19 No: 2 (revised #)
2b	If yes, how often?	Twice Yearly: 12 Once yearly: 3 Every Other Year: 1 Every Five Years: 0
2c	If no, please give reasons	N/A
3a	Do you monitor your covenants/easements/servitudes?	Yes: 7 No: 2
3b	If yes, how often?	Twice yearly: 2 Once yearly: 3 Every Other Year: 0 Every Five Years: 0
3c	If no, please give reasons.	Not begun monitoring
4	How important do you consider the practice of monitoring your full title properties and/or easement/covenant/servitudes that are certified as Ecological Gifts by Environment Canada to be?	Crucial: 1 Very Important: 5 Somewhat: 1
5a	Do your methods of monitoring non-Ecogift land holdings and conservation covenants/easements/servitudes differ from those used to monitor your full title holdings certified as Ecogifts?	No: 5 Yes: 1
5b	If yes, please explain the differences, and provide documentation where	Not sure

	existing.	
6a	Does your organization use a documented methodology or protocol to monitor your Ecogifts?	Yes: 3 No: 4
6b	If yes: Would you be willing to provide us with a copy of the relevant documentation (forms, templates, requirements, etc.)?	Yes: 2 No: 4
6c	If no (to "a" above): Can you give your reasons? If you are willing to share your methodology, but with restricted use, please note this restriction.	<ul style="list-style-type: none"> <li>➤ Not enough resources or expertise-walkabout only</li> <li>➤ Would like to and would appreciate help</li> <li>➤ Walk around the lands</li> <li>➤ Not comfortable as they are personal sheets (not formal)</li> </ul>
7a	What type of monitoring does your organization perform?	Ecological: 1 Compliance: 7 Both: 13
7b	Please describe or provide details	<p><b>Ecogift</b></p> <ul style="list-style-type: none"> <li>➤ Compliance to terms: 2</li> <li>➤ Ecological and Land Use: 2</li> <li>➤ Responsive to calls/impacts: 1</li> <li>➤ General to impacts and ecology: 1</li> <li>➤ Would like to do ecological, but lack of money.</li> <li>➤ Biologist for intrusion and ecological</li> </ul> <p><b>Non-Ecogift</b></p> <ul style="list-style-type: none"> <li>➤ Casual walkabouts and general inspections/notes: 5</li> <li>➤ Ecology with notes of impacts and intruders: 2</li> <li>➤ Allow forest to evolve</li> <li>➤ Intruders/ATV impacts and block</li> </ul>
8.	What are five factors that your organization considers top priority when monitoring one of your protected sites?	See "Section 3.4.2" for list of priority factors.
9.	Are landowners regularly involved or present during regular monitoring activities (covenants/easements/servitudes)?	Always: 0 Generally: 3 Rarely: 1 Never: 3
10	Does your organization develop management plans for your full title properties?	~~~~~
10a	For your Ecogifts?	Yes: 5 No: 2
10b	For your Non-Ecogifts (All Respondents)?	Yes: 11 No: 4
10c	Please Provide Details	<ul style="list-style-type: none"> <li>➤ In Process: 3</li> <li>➤ Limited/Partial/For one management aspect: 9</li> </ul>

- ✦ None: 4
  - ✦ Not required
- 11a What training, if any, do those who perform on-site monitoring for your organization have?
  - ✦ Degrees: 3
  - ✦ Other Training: 8 (Si-map, EMAN, experts, NCC, DU, Internal, individual)
  - ✦ No training or n/a: 9
- 11b Do monitors receive this same training for both non-Ecogifts as well as certified Ecogifts?
  - Yes: 3
  - No: 0
- 11c If no, how does the training vary?
  - N/A, N/R: 3
- 11d Is the same type of training provided for both full title, and for conservation covenant/easement/servitude monitoring?
  - Yes: 4
  - No: 0
- 11e If no please provide details
- 11f If another organization provides the training services, please provide their contact information and relationship.
  - Environment Canada
- 12a Are you aware of any resources that offer templates, information, guidelines, protocols, methods or background related to the monitoring of land or conservation covenants/easements/servitudes?
  - Aware: 12
  - Not Aware: 9
- 12b Can you provide any details
  - ✦ Guide des Bonnes Pratiques: 5
  - ✦ EC: 2
  - ✦ LTA: 1
  - ✦ Fondations de la faune: 2
  - ✦ Others include biologists, seminars, dr,
  - ✦ UNESCO: 1
  - ✦ Own internal resources.
- 12c Do you use any of these resources?
  - Yes: 9
  - No: 2
- 12d Extent of use:
  - ✦ Full range, from "basic" familiarity to "a lot"
  - ✦ Local orgs work as stewards with larger org.
- 13a How does your organization keep track of monitoring details such as past monitoring visits, results, future monitoring obligations etc?
  - Paper: 8
  - Computer: 3
  - Database: 4
- 13b Other
  - Note: 3 organizations do not retain documented monitoring details
- 14 Please explain if your organization has any added security measures for the safekeeping of relevant documentation and schedules (e.g. backups, storage locations, passwords etc.)
  - ✦ Backups: 7
  - ✦ Copies: 1
  - ✦ Fireproof: 2
  - ✦ None: 3
- 15a Has your organization agreed to bring your practices into compliance with any formal "Standards and
  - Yes: 3
  - To Some Extent: 3



## Section 2.5.1: Atlantic Summary Of Monitoring Survey Results

Completed Surveys: 5

Land Trusts with Ecogifts: 3

	Survey Question	Summary of Responses
1a	How many conservation covenants/easements/servitudes does your organization hold and apx. What is their total area?	52 3,406.4 ha
1b	Of these covenants, easements and servitudes how many are certified as Ecological Gifts, and what is their total area?	8 1,408 ha
1c	How many properties do you own the Title to Land, and what is their total area	294 11,237 ha
1d	How many and what area of your full title holdings are certified as Ecological Gifts by Environment Canada?	13 1,205 ha
1e	Do you co-hold your lands or covenants/easements with another conservation organization?	Always: 0 Generally: 0 Rarely: 2 Never: 3
2a	Do you monitor your full title holdings?	Yes: 5 No: 0
2b	If yes, how often?	Twice Yearly: 0 Once yearly: 3 Every Other Year: 1 Every Five Years: 1
2c	If no, please give reasons	N/A
3a	Do you monitor your covenants/easements/servitudes?	Yes: 4 No: 0
3b	If yes, how often?	Twice yearly: 0 Once yearly: 4 Every Other Year: 0 Every Five Years: 0
3c	If no, please give reasons.	N/A
4	How important do you consider the practice of monitoring your full title properties and/or easement/covenant/servitudes that are certified as Ecological Gifts by Environment Canada to be?	Crucial: 3 Very Important: 0 Somewhat: 0
5a	Do your methods of monitoring non-Ecogift land holdings and conservation covenants/easements/servitudes differ from those used to monitor your full title holdings certified as Ecogifts?	No: 3 Yes: 0
5b	If yes, please explain the differences, and provide documentation where	N/A

	existing.	
6a	Does your organization use a documented methodology or protocol to monitor your Ecogifts?	Yes: 3 No: 0
6b	If yes: Would you be willing to provide us with a copy of the relevant documentation (forms, templates, requirements, etc.)?	Yes: 3 No: 0
6c	If no (to "a" above): Can you give your reasons? If you are willing to share your methodology, but with restricted use, please note this restriction.	Note: Draft Only (1)
7a	What type of monitoring does your organization perform?	Ecological: 0 Compliance: 2 Both: 3
7b	Please describe or provide details	<ul style="list-style-type: none"> <li>➤ Ecological (full title), Compliance (easement)</li> <li>➤ Stewardship Guardian Program</li> <li>➤ Easements: Compliance by staff. Title: Volunteer.</li> </ul>
8.	What are five factors that your organization considers top priority when monitoring one of your protected sites?	See "Section 3.5.2" for list of priority factors.
9.	Are landowners regularly involved or present during regular monitoring activities (covenants/easements/servitudes)?	Always: 0 Generally: 3 Rarely: 2 Never: 0
10	Does your organization develop management plans for your full title properties?	
10a	For your Ecogifts ?	Yes: 3 No: 0
10b	For your Non-Ecogifts (All Respondents)?	Yes: 4 No: 1
10c	Please Provide Details	<ul style="list-style-type: none"> <li>➤ Outlines managment appropriate to property: 1</li> <li>➤ Tree, trail and rehab management: 1</li> <li>➤ Follow policy regarding plans:1</li> </ul>
11a	What training, if any, do those who perform on-site monitoring for your organization have?	<ul style="list-style-type: none"> <li>➤ Professional Bio 1: (EG)</li> <li>➤ Procedures in Manual : 1 (EG)</li> <li>➤ Organization trains (NCC) (EG): 1</li> <li>➤ Full time staff: 1</li> <li>➤ "Conservation Guardian" course for volunteers</li> </ul>
11b	Do monitors receive this same training for both non-Ecogifts as well as certified Ecogifts?	Yes: 3 No: 0
11c	If no, how does the training vary?	N/A
11d	Is the same type of training provided for both full title,	Yes: 2

	and for conservation covenant/easement/servitude monitoring?	No: 2
11e	If no please provide details	Staff monitor easements; Volunteers full title (2)
11f	If another organization provides the training services, please provide their contact information and relationship.	N/A
12a	Are you aware of any resources that offer templates, information, guidelines, protocols, methods or background related to the monitoring of land or conservation covenants/easements/servitudes?	Aware: 3 (All EG holders) Not Aware: 2
12b	Can you provide any details	<ul style="list-style-type: none"> <li>➤ LTAUSA</li> <li>➤ On the Ground LTABC</li> <li>➤ NTNB Stewardship Manual references</li> </ul>
12c	Do you use any of these resources?	Yes: 2 No: 1
12d	Extent of use: Reference: 2	
13a	How does your organization keep track of monitoring details such as past monitoring visits, results, future monitoring obligations etc?	<ul style="list-style-type: none"> <li>➤ Paper &amp; Computer: 4</li> <li>➤ Annual Report: 1</li> </ul>
13b	Other	N/A
14	Please explain if your organization has any added security measures for the safekeeping of relevant documentation and schedules (e.g. backups, storage locations, passwords etc.)	<ul style="list-style-type: none"> <li>➤ Backups: 1</li> <li>➤ Developing Database: 2</li> <li>➤ Fireproof: 1</li> <li>➤ Computer backup and building security</li> </ul>
15a	Has your organization agreed to bring your practices into compliance with any formal “Standards and Practices” related to the operations or your organization?	Yes: 1 To Some Extent: 1 No: 3
15b	If yes can you provide some details?	<ul style="list-style-type: none"> <li>➤ Formal adoption next board meeting</li> <li>➤ Compliance but not adopted:</li> <li>➤ NCC has own</li> </ul>
15c	If No, why not?	<ul style="list-style-type: none"> <li>➤ No, not an issue</li> <li>➤ No requirement to do so, not involved with ecogift program.</li> </ul>
15d	Not sure: unfamiliar with Standards and practices	0
16a	Are you aware of any services or products available that may help you monitor and/or keep track of the protected lands in your region?	Yes: 2 No: 3

- 16b If yes, please provide some details
- ✦ Satellite image, too expensive
  - ✦ US software for stewardship records

### **Section 2.5.2 Atlantic Monitoring Priorities**

- ⇒ Tree removal
- ⇒ Compliance
- ⇒ Encroachment
- ⇒ Habitat/ecology/conservation goals (2)
- ⇒ Human/Inappropriate Impacts: (3)
- ⇒ Boundaries and threats: 1
- ⇒ Exotic species.: 1
- ⇒ Target species: 1
- ⇒ Appropriate public use: 1
- ⇒ Fire/vandal impacts: 1
- ⇒ Adjacent property land use and impacts: 2
- ⇒ Changes to natural features: 1
- ⇒ Human impacts: 2
- ⇒ Landowner relationship: 1
- ⇒ Natural disturbance/impacts: 1
- ⇒ Wildlife: 1

**APPENDIX A**  
**NATURE CONSERVANCY OF CANADA (NATIONAL)**  
**RESULTS**

QUESTIONS:

1. Please answer the following 5 questions about the types and total area of the conservation lands that your organization holds and/or manages.

a) How many Conservation Covenants/Easements/Servitudes does your organization hold, and apx. what is their total area?

No. 171 Area: 87,137 acres

b) Of these covenants, easements and servitudes how many are certified as Ecological Gifts, and what is their total area?

No: 77 Area: 38,238 acres (estimated)

c) How many properties do you own the Title to Land, and what is their total area

No. 447 Area 133,898 acres

d) How many and what area of your full title holdings are certified as Ecological Gifts by Environment Canada ?

No.: 64 Area: 23,171 acres (estimated)

e) Do you co-hold your lands or covenants/easements with another conservation organization?

Always \_\_\_\_\_ Generally \_\_\_\_\_ Rarely \_\_\_\_\_ Never \_\_\_\_\_

**This differs radically from fee title to easement – sometimes for fee title, rarely or never for easements**

*Note To Surveyor: If respondent answers "0" or "none" to all the above, please thank them for their time and move on to your next member or call.*

2. a) Do you monitor your full title holdings ?

Yes \_\_\_\_\_ No \_\_\_\_\_

b) If Yes, how often?

Once yearly \_\_\_\_\_ Twice Yearly \_\_\_\_\_

Every Other year \_\_\_\_\_ Every five years \_\_\_\_\_

**NOTE: the intention is to monitor every year, and this generally happens on newer holdings, but on older holdings (esp. 10+ years, it may not happen.)**

c) If no, please give reasons

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. a) Do you monitor your covenants/easements/servitudes?

Yes \_\_\_\_\_ No \_\_\_\_\_

b) If Yes, how often?

Once yearly \_\_\_\_\_ Twice Yearly \_\_\_\_\_

Every Other year \_\_\_\_\_ Every five years \_\_\_\_\_

**See note under 2b above.**

c) If no, please give reasons

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. How important do you consider the practice of monitoring your full title properties and/or easement/covenant/servitudes that are certified as Ecological Gifts by Environment Canada to be?

- a) Crucial \_\_\_\_\_
- b) Very Important \_\_\_\_\_
- c) Somewhat Important \_\_\_\_\_
- d) Not Very Important \_\_\_\_\_
- e) Not Needed \_\_\_\_\_

5. a) Do your methods of monitoring non-Ecogift land holdings and conservation covenants/easements/servitudes differ from those used to monitor your full title holdings certified as Ecogifts?

Yes \_\_\_\_\_ No \_\_\_\_\_

(Some found this question unclear; we took it to mean simply whether there was a difference in the way we treated Ecogift vs non-Ecogift holdings.)

b) If yes, please explain the differences, and provide documentation where existing.

i) For full title holdings (Ecogift vs. non-Ecogift)

- although respondents said there was no difference, they also said there was a need to be particularly diligent where Ecogift properties are concerned

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

ii) For conservation covenants/easements/servitudes (Ecogifts vs. non-Ecogifts)

- see response above

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. a) Does your organization use a documented methodology or protocol to monitor your Ecogifts?

Yes \_\_\_\_\_ No \_\_\_\_\_

b) If yes: Would you be willing to provide us with a copy of the relevant documentation (forms, templates, requirements, etc.)?

Yes \_\_\_\_\_ No \_\_\_\_\_

c) If no (to "a" above): Can you give your reasons? If you are willing to share your methodology, but with restricted use, please note this restriction.

\_\_\_\_\_  
\_\_\_\_\_

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**Note to surveyor: Please collect all relevant documentation and forward to the Land Trust Alliance of BC with the results of your surveys.**

7. a) What type of monitoring does your organization perform?

- Ecological Monitoring (i.e. monitor the successional changes in the protected ecosystem, ecosystem health, etc..)
- Compliance Monitoring (i.e. ensure that the terms of the conservation agreement are being upheld):
- Both? (Please provide details)

b) Please describe or provide details \_\_\_\_\_ (See Monitoring protocols/Procedures per Stewardship Manual documentation also supplied) \_\_\_\_\_

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8. What are five factors that your organization considers top priority when monitoring one of your protected sites?

1. Evaluation of conservation success
2. Site condition
3. Changes against baseline documentation
4. Effectiveness of stewardship activities
5. Adherence to easement restrictions

9. Are landowners regularly involved or present during regular monitoring activities (covenants/easements/servitudes)?

Always \_\_\_\_\_ Generally \_\_\_\_\_ Rarely \_\_\_\_\_ Never \_\_\_\_\_

10. Does your organization develop management plans for your full title properties?

- a) Your Ecogifts: Yes \_\_\_\_\_ No \_\_\_\_\_  
b) Your non-Ecogifts Yes \_\_\_\_\_ No \_\_\_\_\_  
c) Please provide details  
\_\_\_\_\_(See "Stewardship Statements" in Stewardship Manual provided)

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11. a) What training, if any, do those who perform on-site monitoring for your organization have?

- varies by needs (landowner contact training will be different than that required to assess biophysical requirements, for example)
- many have biology/ecology/natural history/range management training

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b) Do monitors receive this same training for both non-Ecogifts as well as certified Ecogifts?

Yes \_\_\_\_\_ No \_\_\_\_\_

c) If no, how does the training vary?

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d) Is the same type of training provided for both full title, and for conservation covenant/easement/servitude monitoring?

Yes \_\_\_\_\_ No \_\_\_\_\_

e) If no please provide details.

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f) If another organization provides the training services, please provide their contact information and relationship.

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12. a) Are you aware of any resources that offer templates, information, guidelines, protocols, methods or background related to the monitoring of land or conservation covenants/easements/servitudes?

I am aware \_\_\_\_\_ I am not aware of any \_\_\_\_\_

b) Can you provide any details?

- our staff identified a number of sources, including both internal (Stewardship Manual, Site Registry), and external sources (Land Trust Alliance U.S.)

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c) Do you use any of these resources, and if so, to what extent?

Yes \_\_\_\_\_ No \_\_\_\_\_

d) Extent of Use

- use internal sources regularly; consult other sources in order to compare/refine internal protocols (extent of use of external sources may vary from region to region)

e) How does your organization keep track of monitoring details such as past monitoring visits, results, future monitoring obligations etc?

- i. Database \_\_\_\_\_
- ii. Paper Files \_\_\_\_\_
- iii. Computer Files \_\_\_\_\_
- iv. Automated Reminders (eg. Computer alarms) \_\_\_\_\_

b) Other \_\_\_\_\_

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13. Please explain if your organization has any added security measures for the safekeeping of relevant documentation and schedules (e.g. backups, storage locations, passwords etc.)

- fireproof storage for paper files  
- computer files password protected

- tape-backup computer files

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15. a) Has your organization agreed to bring your practices into compliance with any formal “Standards and Practices” related to the operations or your organization? For example, the Land Trust Alliance of BC, the Ontario Land Trust Alliance, and Regroupement des organismes propriétaires de milieux naturels protégés du Québec (RMN) have all published similar “Standards and Practices” documents and recommend that all land trust/conservancy organizations bring into compliance, adopt and follow such guidelines?

Yes \_\_\_\_\_ To some extent: \_\_\_\_\_ No \_\_\_\_\_

b) If Yes, can you provide some details? \_\_\_\_

- Internally developed standards and practices developed through review of external S&Ps, modified as necessary; includes governance, securement and stewardship standards and practices

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c) If No, why not? \_\_\_\_\_

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d) Not sure: unfamiliar with “Standards and Practices” \_\_\_\_\_

16. Are you aware of any services or products available that may help you monitor and/or keep track of the protected lands in your region?

Yes \_\_\_\_\_ No \_\_\_\_\_

b) If yes please provide details

- Erler's Landsteward  
- Internal site registry database  
- LTABC has tracking database

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