



AVALONIA LAND CONSERVANCY, INC. PROPERTY STEWARDSHIP MANUAL

MISSION STATEMENT: We preserve natural habitats in southeastern Connecticut by acquiring and protecting lands, and by communicating the value of these irreplaceable resources.

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A MESSAGE TO OUR VOLUNTEERS

Thank you for volunteering your time to become a property steward for Avalonia Land Conservancy, Inc. Avalonia depends almost entirely upon volunteer help to maintain its preserves and to manage its affairs. Among other duties, volunteers maintain trails, walk boundaries looking for encroachments, and monitor easements. We could not function without you. Avalonia's officers, directors, and members are part of your community, your neighbors, who are working to conserve our local natural resources for the common benefit.

ABOUT AVALONIA LAND CONSERVANCY, INC

Avalonia Land Conservancy, Inc. is a land trust dedicated to the conservation of natural areas by acquiring and protecting land. It is a non-profit, non-political, tax-exempt organization. We believe it is essential to conserve our natural resources for the benefit of wildlife, our present generation, and the generations yet to come.

Avalonia now holds more than 3500 acres of land, preserved in perpetuity as natural open space. Preserves are presently located in eight towns across southeastern Connecticut, including Griswold, Groton, Ledyard, Norwich, North Stonington, Preston, Sprague, and Stonington, as well as in the states of New York and Rhode Island.

Avalonia conserves land in two ways, each with different stewardship requirements. The majority of our holdings are fee simple properties, which means that Avalonia owns the land outright. All Avalonia fee properties are open to the public with restrictions only where needed to protect nesting birds or fragile habitat. Where it is appropriate, trails are maintained for 'passive' enjoyment, such as hiking, bird watching, and photography. Avalonia encourages educational activities and scientific studies on its preserves. We also hold conservation easements (sometimes called conservation restrictions). These are legal agreements between a private landowner and a land trust. In this case we do not own the land, but the owner has placed restrictions on his own land in order to protect its conservation values and we, as the holder of the easement, are legally responsible for ensuring that those restrictions are followed. Usually these lands are not open to the public and are subject to very individual deed restrictions.

Avalonia is governed by a board of directors that holds the ultimate responsibility for oversight of the stewardship of its preserves and monitoring of its easements. The actual work of maintenance and monitoring, however, is carried out by the volunteer members of local town committees that operate under the guidance of the Stewardship Committee, one of Avalonia's standing committees.



ABOUT THIS MANUAL

The purpose of this manual is to provide you, the volunteer steward, an overview of the breadth of our responsibilities, and the knowledge you need to perform these duties. If you have further questions about what to do or how to do it, consult the chair of your town committee or the Stewardship Committee chairperson.

A NOTE ABOUT PAPERWORK

Although none of us like doing paperwork, it is critically important to document the work we do for several reasons:

- It is important to have a record of all work done on a preserve for anyone in the future to use as a reference. "If it is not documented, it is not done".
- It is a requirement of the Land Trust Alliance to document annual monitoring visits to both fee properties and conservation easements.
- It is critical to document the many hours that volunteers generously dedicate to Avalonia. We use these hours to quantify and demonstrate to our board and potential funders the breadth of our volunteer support. *Hard numbers are very convincing.*
- **Volunteer hours often can be used as "matching funds" for grants, making Avalonia applications more competitive.**

Directions for completing documentation of all work on preserves:

- Go to the Avalonia website at avalonialandconservancy.org.
- Scroll to the bottom of the home page and click on the link for **Stewardship and Volunteer Activity Forms**.
- Click on **Stewardship Activity Report Form** to access the on-line jot form.
- Enter the information requested. Be careful to not hit return or click submit until you have completed the form satisfactorily because there is no way to edit it.
- With your cooperation in thoughtfully, promptly, and accurately completing the on-line jot forms, we will have the necessary information. **It is critical that these forms be filled in as soon as possible.** If it is impossible for you to complete the on line form, please contact your town committee chair who will take your report and enter it for you.

Thank You!



A NOTE ABOUT SAFETY

Your safety is Avalonia's first priority. We want to ensure that you are able to perform your responsibilities in a safe manner. That is why we recommend that you will follow these guidelines when you are volunteering on our preserves.

- DO let someone know when you are planning to spend time on a property and how long you expect to be there.
- DO bring a charged cell phone.
- DO wear appropriate clothing when doing fieldwork.
- DO take precautions against ticks, including long pants and spraying at least your shoes and pants legs with bug spray.
- DO perform a "tick check" after spending time in the field.
- Do read and follow the safety precautions listed in the Chain Saw Use Policy in Appendix A.
- Do always work with another person if using power equipment.
- DO stay away from all wild animals, and report any potentially rabid animal to the Avalonia staff and/or your local animal control authority.
- DO be aware of hunting season. CT DEEP's Fluorescent Orange Recommendation: "From September 1 through the last day of February...wear at least 400 square inches of fluorescent orange or bright yellow clothing above the waist and visible from all sides. An orange hat, in addition to a coat or vest, is strongly recommended."
- **DO NOT put yourself in an uncomfortable or dangerous situation** with people or animals.
- DO NOT consume any alcohol, drugs, or medicines that might impair your ability to work safely while in the field.
- DO NOT carry a firearm while volunteering for Avalonia.



STEWARDSHIP OF FEE PROPERTIES

STANDARD PRESERVE REGULATIONS

- All Avalonia fee properties are open to the public. However, use of the preserves, including trails, is at the user's own risk.
- Dogs must be leashed at all times.
- On trailed properties visitors are asked to stay on the marked and blazed trails. Hiking, photography, and bird watching are encouraged. With a few exceptions horseback riding is not allowed.
- Mountain bikes are not allowed unless posted.
- Trails are marked by blazes painted on trees.
- Hunting is not permitted on Avalonia preserves. Fishing is generally allowed (with appropriate state permits) where appropriate and a sustainable population of fish is present. We encourage catch and release type fishing.
- Camping and fires are not allowed on Avalonia preserves.
- Preserves are open from dawn to dusk and there is no overnight parking in off street lots.
- Group visits by schools, clubs, scouts and others are welcome. All youth groups must be under the guidance of an experienced leader.

NO UNAUTHORIZED MOTORIZED VEHICLES are allowed except as needed for approved maintenance



ONGOING PRESERVE STEWARDSHIP

If there are particular management activities that need to be performed on each preserve, they are detailed in that preserve's management plan, which can be found in the town binder in the office. Before working on a preserve you should be aware of this information. When you visit a preserve:

- DO carry a notepad and pencil in case you need to jot things in the field or leave a note.
- DO carry a plastic garbage bag so you can remove any litter you find.

Basic Trail Maintenance

- Drainage - Clean water bars and drainage ditches of dirt and debris each spring and fall.
- Trail Clearing - Clear blow downs and limbs you can move without cutting. Inform town committee chair of those obstructions requiring a chain saw to clear.
- Clear brush annually or as needed during growing season to form a trail corridor of a comfortable width and height. Both the Appalachian Mountain Club and Connecticut Forest and Parks Association recommend clearing a path 4 feet wide by 8 feet high.
- Trail Definition - Prevent development of widened trails and multiple treadways bypassing wet areas and switchbacks.
- Trail Marking - Mark trails with paint blazes (please refer to Appendix B for detailed instructions for blazing trails).
- For more detailed instructions regarding trail maintenance, please refer to the *Appalachian Mountain Club Trail Adopter's Handbook*, which can be found at http://www.outdoors.org/pdf/upload/Adopter-Handbook_15th-Edition_2015.pdf.

Other Maintenance Duties

- Remove any litter you find, including from road frontages and parking areas.
- Inspect bridges and other man-made structures for soundness.
- Note any needs for improved trail blazing on the jot form.
- Note any needs for repairing or replacing Avalonia signs on the jot form.
- Repair and clear stonewalls.
- Check and clean birdhouses.
- Immediately report to the town committee chair or the Stewardship Chair any dead or dying trees near trails, erosion, or other potential threats to visitors, volunteers, or significant resources.
- Note any hazard(s) on the jot form.
- Please note that only people authorized by Avalonia may remove hazardous trees or other potential threats.
- Promptly notify the town committee chair or the Stewardship Chair of any damage that requires immediate attention and note evidence of the damage on the jot form.
- No Avalonia properties are open to hunting. Report evidence of hunting, shooting, etc. to the town committee chair or the Stewardship Chair. Report the locations of hunting stands.
- Camping and fires are prohibited on all Avalonia properties. Remove evidence of camping activity to discourage future campers.

Equipment for Working on Preserves

- All hand and power tools as well as other equipment, including signs, needed for work on our preserves are stored in a trailer parked behind Avalonia's office on Hatch Street in Mystic.
- Information on specific power tools can be found in the equipment trailer.
- Please refer to Appendix C for the Avalonia Tool Use Policy.
- Your town committee chair can give you the combination to open the trailer.
- Please enter the required information on the sign-out sheet you will find in the trailer when you borrow any equipment.
- Please make sure that the equipment you have used is clean and in good working order when you return it. If repairs are necessary please notify the Stewardship Chair.

Annual Boundary Walks

All preserves must be actively monitored to prevent misuse, to observe the natural succession, and to evaluate management. This should be done at least once per year, either in the spring before leaf out or in the fall after leaves drop. Stewards should walk the entire boundary of the preserve, unless the boundary is impassable because it crosses water or goes through exceedingly thick vegetation.

Avalonia will ensure that stewards are provided with up-to-date boundary maps as well as GIS parcel maps on a hand-held GPS device. Avalonia owns one hand-held device that stewards can sign out. You may also use your own GPS devices and/or smart phones. New stewards will be instructed how to place the parcel files on a device and will also be shown the boundaries by someone familiar with the property. Boundaries should be marked with Avalonia signs placed roughly 50 - 75 feet apart with signs facing outwards.

During your boundary walk you should

- Replace boundary markers as needed;
- Document any suspected encroachment (cutting trees; removing or adding vegetation, rocks, fences, or signs; dumping of yard waste, changing of stonewalls) with photographs and GPS coordinates if possible (see notes on documentation below);
- Make particular note of major dumping, and if there is any evidence of the responsible parties, document evidence with notes and photographs;
- **Promptly notify your town committee chair or the Stewardship Chair of any issues.**

Posting Boundaries

When Avalonia acquires a new fee property, one of the first steps in managing the property is to post all of its boundaries with our signs, so the public, and especially abutting landowners,

know where our property begins. You may be asked to assist in this process on new acquisitions, but you will not be asked to do this by yourself.

We use two types of boundary markers. The large, 12-inch x 9-inch signs are used for boundaries along roads, and at property corners where they are placed at right angles to designate a corner. They are also used where trails from neighboring properties enter our property. On the interior boundaries smaller 4-inch signs are used, although every third or fourth sign should be a 12-inch sign. Please refer to Appendix D to see pictures and descriptions of some of the signs we use.

If at all possible markers should be installed on living trees and placed 7 feet or higher to deter vandalism. Markers should be placed so they are facing away from our property and towards the neighboring property. Use galvanized or aluminum 3-inch nails so as not to harm the tree. Do not sink nails all the way—leave approximately 1 inch of nail exposed to account for tree growth. Space signs at intervals of approximately 50 to 75 feet, or at line-of-sight intervals. Position markers as close to the boundary line as possible, **making sure to stay on Avalonia's side of the boundary.**



MAJOR STORM RECONNAISSANCE

As the past few years have shown, we should be prepared to act in the event of a large storm or other natural disaster. In the case of these large scale events Avalonia preserves should be monitored as soon as the event has passed and it is safe to venture outside. **Extreme caution should be taken upon entering the woods just after these events.**

- Walk the trails and other publically frequented areas first.
- Identify hazardous areas. If you feel the preserve should be closed temporarily, notify the Avalonia office and the town committee chair immediately.
- If there are hazardous conditions that you are unable to address, notify the office and town committee chair. Avalonia will determine how to address the issue.
- **DO NOT PUT YOUR HEALTH AND SAFETY AT RISK**
- Remember to submit a monitoring jot form after your visit. Your jot form should describe the damage as clearly as possible.



REPRESENTING AVALONIA

As an Avalonia Land Conservancy volunteer, you have an opportunity to interact with the public. To the extent you are comfortable doing so, Avalonia encourages you to

- Share your positive experiences as an Avalonia volunteer.
- Answer questions about our preserves.
- Pass out Avalonia materials including business cards and brochures if available.
- Remind visitors politely and tactfully about the preserve regulations (especially as they relate to dogs, hunting, and motorized vehicles).
- Recruit additional volunteers. If someone is interested in volunteering, please get their contact information and encourage them to contact Avalonia. Please give your town committee chair or the Avalonia office their information so we can reach out to them as well.



INVASIVE SPECIES MANAGEMENT

Invasive species, particularly plants, have become common locally and in many of the Avalonia preserves. In fact, some are ubiquitous and severely impact habitat by displacing and overwhelming native flora. Invasive plants change the makeup and “structure” of habitat. In some instances they form a monoculture with little diversity, while in others they kill desirable vegetation.

More common invasive species include woody vines such as oriental bittersweet, porcelain berry, Japanese honeysuckle, and black swallow wort, woody shrubs like Japanese barberry, winged euonymus, multiflora rose, and autumn and Russian olive, and herbaceous plants such as garlic mustard.

You can make a positive impact by working to eliminate invasive species. **Consult with your town committee chair, however, before beginning any invasive species clearing to be sure you are attacking the correct plants and using the right techniques.**



SPECIFIC SITUATIONS AND WHAT TO DO

Dumping

Dumping of any kind is illegal! If there is any chance of hazardous waste involved, stay away from the material. Do not open closed containers, sniff any suspicious substances or touch any container that could potentially hold dangerous materials. **Report any instances of dumping on the property to the town committee chair, or the Stewardship Chair, who may file a police report.** Be prepared to document

- What has been dumped, how much there is, where it is on the property, when you think it might have occurred, how it could be removed.
- Who would be most appropriate to do the clean-up work (a volunteer or a contractor) and what special equipment might be needed to remove the material (a dump truck, a backhoe, a pickup, or other equipment).
- Report any dumping on your jot form. Do not take action without Avalonia approval.

Vandalism

Vandalism of any kind is illegal! Report any vandalism to your town committee chair or the Stewardship Chair. Be prepared to document

- What was done, where it is on the property, when you think it might have occurred, what action should be taken to remedy the situation.
- See above for how to document the incident.
- Record any vandalism on your jot form. Do not take any action without Avalonia approval.

Off Road Vehicles

Unauthorized motor vehicle use (motorcycles, ATVs, any 4x4 vehicle, and dirt bikes) are prohibited on all Avalonia preserves. If you find evidence of any motorized vehicle use, report it to your town chair or the Stewardship Chair immediately and note it on your jot form. Be prepared to document

- Where vehicles were being used, how they accessed the property if known, what type of vehicle it was, and what damage may have been caused.
- If you find someone on a motorized vehicle on a preserve, get a license number or description of the driver and the vehicle if possible.
- **DO NOT approach or accost anyone on an ATV or other unauthorized vehicle. Never put yourself in an uncomfortable situation. Your safety is paramount.**

Boat Storage

The storage of boats is prohibited on Avalonia properties. Report any boats you find to the town committee chair or the Stewardship Chair. Please refer to the Waterfront Property Usage Policy in Appendix E.

Camping/Fire Rings

Camping and fires are prohibited on all Avalonia preserves. If you find a campsite that is occupied, speak with the individuals **if you feel comfortable** and let them know that camping is prohibited on Avalonia preserves. **Never put yourself in an uncomfortable situation.** If you come upon tents or other equipment and no one is present, leave a note stating that camping is prohibited and ask them to remove their camp from the preserve and to restore the area back to its natural state by a given date. If the equipment is not removed by that date, remove the equipment yourself and leave a note stating how the person can reclaim it. Contact your town committee chair or the Avalonia office ASAP about any camping activities. Any evidence of fire rings or camping should be dismantled and the area should be restored to natural condition. Carry out any trash from an abandoned site with you. Make note of areas used for camping, and visit them periodically to ensure that they are not being used continually. Report any evidence of camping or fires to the town committee chair and on your jot form.

Timber Trespass

Cutting of trees on Avalonia preserves without authorization is illegal. If you suspect that timber is being cut illegally, contact the town committee chair or the Stewardship Chair ASAP. Provide information on the

- Approximate number of trees, the approximate stump diameters, how much land area is involved, where on the preserve the cutting occurred, how the area was accessed, when you think it may have occurred, and whether any action needs to be taken to clean up the areas.
- Report any incidents on your jot form.

Hunting and Deer Stands

Hunting is not permitted on any Avalonia preserve. If you encounter a trespassing hunter, **do not** approach the hunter. Instead, contact the town committee chair or the Stewardship Chair ASAP. On your jot form make note of the area they are hunting and whether or not you saw a deer stand/hunting blind. If you come across a deer stand/hunting blind, you will need to report it to the town committee chair with location by GPS or on paper map if possible, and Avalonia will take appropriate action.

Erosion on Trails/Roads

Minor erosion should be corrected before it becomes a serious problem. Always keep an eye out for signs of erosion: sediment at the bottom of a hill, areas on hills where the treadway has begun to wash away, and clouding of streams during rain storms. Notify the town committee chair of any trail maintenance needs. Take a photo to document your observation.



CONSERVATION EASEMENT MONITORING

EASEMENTS, BASELINE DOCUMENTS, AND MONITORING

Conservation easements are crafted to protect a property's conservation values in perpetuity. IRS regulations specify that an organization must have a commitment to protecting the conservation purposes of an easement or the organization risks losing its ability to accept further conservation easements.

A **Conservation Easement** is an agreement between a private landowner and the land trust to permanently restrict the landowner's property to ensure certain conservation values are protected. The easement may cover all or a portion of the land in question, and generally prevents development and significant manmade alterations to the land. The land trust's responsibility is to ensure that the terms of the conservation easement are being upheld, generally through regular monitoring and outreach to the landowner(s). If there is a documented violation, the land trust will pursue remedies to resolve the violation and restore the property if necessary.

A **Baseline Documentation Report (BDR)** is a descriptive record of the conservation easement property at the time of the granting of the easement. Through maps, photographs, and text, the BDR defines what the land looked like when the easement was granted. Monitors of the property can then compare current conditions to the baseline and determine when and where any significant changes occurred that might have an impact—positive or negative—on the conservation values. The BDR is helpful in determining how to restore an area that may have experienced a violation and can be a critical document during an enforcement action. Because BDRs were not produced for some of our easements at the time the easement was granted, documents called Current Condition Reports have been written in lieu of BDRs. They fulfill the same function.

Monitoring is the regular inspection and documentation of the condition of a protected property. It is usually completed by a team of at least two stewards walking the property. Monitoring visits are documented in writing and with appropriate photographs.

The aim of monitoring is to determine whether any changes—natural or man-made—have occurred on a property over time so that Avalonia can ensure that the terms of the conservation easement are being upheld. Equally important, regular monitoring helps to maintain a continuous positive relationship with the landowner(s). The keys to preserving the conservation values of an easement and preventing violations are:

- **A program of regular (at least annual), systematic, and well-documented monitoring;**
- **Good record-keeping;**
- **A positive relationship with the property owner and the community.**

Discretion is important. Even though Avalonia holds a conservation easement on a property, it remains privately owned. Although Avalonia's conservation easement agreements provide visitation rights for the purpose of monitoring, they do not contain provisions permitting general public access to the property. Therefore no one other than the members of the Avalonia board, a trained monitor, or an authorized representative of Avalonia should accompany you on an annual inspection. Any observations you make and/or report to Avalonia are to be considered confidential information collected for the purposes of fulfilling Avalonia's duties as conservators.

INSTRUCTIONS FOR CONSERVATION EASEMENT MONITORING

You will find complete and detailed instructions for what to do before, during and after a monitoring visit to a conservation easement in Appendix F. You will find sample letters and a monitoring report in appendix G. What follows here is essentially an overview of the process.

Before the Inspection

Several weeks prior to the planned inspection, it is your responsibility to contact the landowner by letter to let him/her know when you will be visiting, or to schedule a mutually convenient time if the landowner is interested in meeting you or accompanying you on your visit. Review the conservation easement reserved rights and restrictions, past monitoring reports, and recent correspondence with the landowner. Plan your route for the inspection by reading over past reports. Plan on bringing the following items with you:

- Camera + extra batteries (or use your cell phone camera—charge it!)
- Directions
- Monitoring forms
- Clipboard or equivalent
- Pens/pencils

- Large Avalonia Preserve sign to put on dash board.
- Bug spray for ticks
- Charged cell phone
- Bags to use during wet weather and for picking up trash
- Clippers/hand pruners
- CT DEEP's Fluorescent Orange Recommendation: "From September 1 through the last day of February...wear at least 400 square inches of fluorescent orange or bright yellow clothing above the waist and visible from all sides. An orange hat, in addition to a coat or vest, is strongly recommended."
- GPS unit + extra batteries if you know how and are comfortable using one

During the Inspection

- (1) Your route will depend on the property. For properties without established photo-point monitoring routes, **walk the property boundary first, and then inspect the interior.** Experienced easement monitors report that most easement violations occur at the boundaries, e.g., by trespassers, and often without a property owner's awareness. Inspect as much of the interior as is practical. Focus on areas of recent activity, such as construction, earthmoving, digging, clearing, tree cutting, etc., indicative of changes in land use. If property size, remoteness, or topography makes it impractical to walk the entire property, vary your annual monitoring routes so that a different portion of the property each year is covered, and so that the entire property is seen on a rotation of every 2-3 years.
- (2) **Document current conditions.** Compare current conditions with those documented in past monitoring reports and photos (if available). As thoroughly and objectively as possible, document all observed natural and human-caused changes on the property. Complete the monitoring report provided in the monitoring binder. If you suspect an easement violation, record this and any other concerns, as well as speculations, on the monitoring form. Use photographs and copies of property maps to document any major changes in property condition or land use.

After the Inspection

- (1) **Completely fill out your monitoring report within 2 weeks after completion of your inspection.** The longer you wait, the more likely you are to forget!
- (2) Remember to keep your observations on the monitoring report as objective and factual – but still thorough – as possible. If you have any concerns that the terms of the easement may have been violated, please note these concerns on your report and notify the town committee chair and the Stewardship Chair as soon as possible.
- (3) **Sign and date, all documents: the monitoring report, map, any photos you print.**
- (4) **Return your completed report and all accompanying documentation to the Avalonia office as soon as possible.** Our timely response to potential violations depends upon the timely completion of your report. Please return the Monitoring Folders so that we can

keep them updated and prepare them for the following year's inspection. Make notes of any changes that need to be included in the files (new phone numbers, change of owners etc.)

- (5) If there are no suspected violations of the easement, write a letter to the landowner informing them of your findings. If you do find a suspected violation, do not contact the landowner; instead **immediately report this to your town committee chair or the Stewardship Chair**. The town committee chair and the stewardship committee will investigate the suspected violation.



SPECIAL INSTRUCTIONS: DOCUMENTING ISSUES

If you encounter a potential issue in the field

(1) Document the issue.

- Take as many photographs and try to quantify the issue as well as possible to identify the problem and mark locations on a map. If you are GPS savvy, establish a waypoint or obtain a location. If photos aren't possible, be sure to record detailed observations of the potential problems on the monitoring report form ASAP and inform Land Trust staff when you get back from your visit.
- Determine the cause of an observed issue, if possible. (Force of nature such as wind, erosion, fire or insects; landowner, property manager or tenant; third party violations such as neighbors)
- Note any remediation or work in progress or that has already taken place.

It is critical for volunteers not to confront or accuse the landowner of any wrongdoing at the time of the visit. YOUR RESPONSIBILITY IS DOCUMENTATION ONLY! Please remember this at all times. The land trust will use your documentation and its experts and attorneys to determine if a violation has taken place and how to address it.

It is NOT a volunteer's job to do any of the following:

- Interpret the terms of the conservation easement for the landowner. Direct any questions the landowner may have about the easement to Avalonia staff.
- Approve or disapprove any future plans or reserved rights the landowner may wish to discuss.
- Accuse the landowner of violating the terms of the easement.
- Carry out any kind of mediation or enforcement action regarding a violation.
- If you find small amounts of litter that the landowner may not be aware of (deflated balloons in the middle of the woods, for example) you may remove it if you choose. However, we do not clean up dump sites.

(2) Notify Avalonia As Soon As Possible.

Report the issue or violation to your town committee chair or the Stewardship Chair as soon as possible.

Violations that are obvious (new building in a non-development zone) or are in progress (grading, tree cutting) should be reported immediately. The Stewardship Committee and/or Board of Directors will review the situation with you.

GET THE MONITORING FORM, MAP, PHOTOS, NOTES to Avalonia as soon as possible (within 48 hours) so the organization can act quickly.



APPENDIX A: AVALONIA LAND CONSERVANCY'S POLICY STATEMENT ON CHAIN SAW USE BY VOLUNTEERS ON AVALONIA PROPERTIES

Chain saws cause about 40,000 reported injuries and deaths annually in the United States. Most are head and leg injuries. Almost all chainsaw accidents can be prevented by using common sense and by using safe cutting practices endorsed by OSHA and the logging industry.

Avalonia's policy on chainsaw use by volunteers on Avalonia properties involves three requirements: proper protective clothing, use of a modern chain saw in good working order, and a commitment to follow the practices in this policy statement derived from current OSHA standards. Avalonia will offer training in safe chainsaw use. Volunteers wishing to use a chain saw while on Avalonia property will be given a printed copy of this policy and must sign the receipt located on the last page and return it to your town committee representative.

Proper Protective Clothing

Volunteers are required to wear the following protective clothing when using a chain saw on our property:

- A hard hat meeting ANSI Z89.1-1997, preferably with a face shield and ear protectors built in;
- Protective leg chaps or pants designed for chainsaw use;
- Eye protection;
- Hearing protection; and
- Leather boots, preferably above the ankle boots with steel toes. Other boots designed for chainsaw use are acceptable.

Gloves are recommended but not required.

Chain Saw

A volunteer who brings his or her own gas-powered chain saw must use a saw meeting ANSI 175.1-1991. The user shall check the saw every day before use to verify that:

- The throttle interlock works;
- The chain brake works;
- The spark arrestor muffler is in place;
- The chain catch is present; and
- The saw is in good overall condition without missing parts or loose fasteners.

Training

Volunteers are not required to have any minimum amount of training in chainsaw use. However, training equivalent to the “Game of Logging” training, steps 1 and 2, is highly recommended. Such training should include:

- Parts of a chain saw and their purpose
- Parts of a chainsaw blade and how to sharpen the blade
- How to size-up a tree for cutting
- How to cut down a tree – preferably using the plunge cut method taught in the Game of Logging
- How to safely limb a downed tree
- How to safely buck a downed log
- How to safely cut a spring pole
- The importance of never working alone

Avalonia will hold an annual training session on chainsaw safety, or more often if there is sufficient interest. Volunteers may also request reimbursement from Avalonia for classes meeting the above guidelines.

Work Authorization

All chainsaw work must be authorized by the appropriate town committee. Unauthorized cutting of trees on a nature preserve can result in monetary damages up to 5 times the value of the trees cut. The authorizing town committee shall ensure that at least two people are on site when chainsaw work is performed. The town committee, or chain saw team leader, shall ensure that a first aid kit is available at the work site.

Chainsaw Operation and Work Practices

- The chain saw shall be fueled at least 10 feet (3 m) from any open flame or other source of ignition.
- The chain saw shall be started at least 10 feet (3 m) from the fueling area.
- The chain saw shall be started on the ground or where otherwise firmly supported. Drop starting a chain saw is prohibited.
- The chain saw shall be started with the chain brake engaged.
- The chain saw shall be held with the thumbs and fingers of both hands encircling the handles during operation.
- The chain-saw operator shall be certain of footing before starting to cut. The chain saw shall not be used in a position or at a distance that could cause the operator to become off-balance, to have insecure footing, or to relinquish a firm grip on the saw.

- Prior to felling any tree, the chain-saw operator shall clear away brush or other potential obstacles which might interfere with cutting the tree or using the retreat path.
- The chain saw shall not be used to cut directly overhead.
- The chain saw shall be carried in a manner that will prevent operator contact with the cutting chain and muffler.
- The chain saw shall be shut off or the throttle released before the feller starts his retreat.
- The chain saw shall be shut down or the chain brake shall be engaged whenever a saw is carried further than 50 feet (15.2 m). The chain saw shall be shut down or the chain brake shall be engaged when a saw is carried less than 50 feet if conditions such as, but not limited to, the terrain, underbrush and slippery surfaces, may create a hazard for a volunteer.
- Volunteers shall be spaced and the duties of each volunteer shall be organized so the actions of one will not create a hazard for any other.
- Work areas shall be assigned so that trees cannot fall into an adjacent occupied work area. The distance between adjacent occupied work areas shall be at least two tree lengths of the trees being felled. The distance between adjacent occupied work areas shall reflect the degree of slope, the density of the growth, the height of the trees, the soil structure and other hazards reasonably anticipated at that work site. A distance of greater than two tree lengths shall be maintained between adjacent occupied work areas on any slope where rolling or sliding of trees or logs is reasonably foreseeable.
- Each volunteer performing a logging operation at a work site shall work in a position or location that is within visual or audible contact with another person.

The team leader shall account for each volunteer at the end of the work day.

Felling and Trimming Trees

- No person shall approach a feller closer than two tree lengths of trees being felled until the feller has acknowledged that it is safe to do so.
- Each danger tree shall be felled, removed or avoided. Each danger tree, including lodged trees and snags, shall be felled or removed using mechanical or other techniques that minimize volunteer exposure before work is commenced in the area of the danger tree. If the danger tree is not felled or removed, it shall be marked and no work shall be conducted within two tree lengths of the danger tree.
- Felling on any slope where rolling or sliding of trees or logs is reasonably foreseeable shall be done uphill from, or on the same level as, previously felled trees.
- Domino felling of trees is prohibited. **Note:** The definition of domino felling does not include the felling of a single danger tree by felling another single tree into it.
- Before felling is started, the feller shall plan and clear a retreat path. The retreat path shall extend diagonally away from the expected felling line. Once the backcut or trigger cut has been made the feller shall immediately move a safe distance away from the tree on the retreat path.

- Before each tree is felled, conditions such as, but not limited to, snow and ice accumulation, the wind, the lean of tree, dead limbs, and the location of other trees, shall be evaluated by the feller and precautions taken so a hazard is not created for any person.
- Each tree shall be checked for accumulations of snow and ice. Accumulations of snow and ice that may create a hazard shall be removed before felling is commenced in the area or the area shall be avoided.
- When a spring pole or other tree under stress is cut, no person other than the feller shall be closer than two trees lengths when the stress is released.
- An undercut shall be made in each tree being felled. The undercut shall be of a size so the tree will not split and will fall in the intended direction.
- A backcut shall be made in each tree being felled. The backcut shall leave sufficient hinge wood to hold the tree to the stump during most of its fall so that the hinge is able to guide the tree's fall in the intended direction.
- The backcut shall be above the level of the horizontal facecut in order to provide an adequate platform to prevent kickback. Exception: The backcut may be at or below the horizontal facecut in tree pulling operations. **Note:** This requirement does not apply to open face felling where two angled facecuts rather than a horizontal facecut are used or to plunge cut backcuts where trigger wood is left provided that the facecut angle is at least 70 degrees.
- Limbing and bucking on any slope where rolling or sliding of trees or logs is reasonably foreseeable shall be done on the uphill side of each tree or log.
- Before bucking or limbing wind-thrown trees, precautions shall be taken to prevent the root wad, butt or logs from striking any person. These precautions include, but are not limited to, chocking or moving the tree to a stable position.



Example of a top facecut



Example of a bottom facecut



Example of a backcut

Note that with a plunge cut trigger wood is left on the outside away from the bottom cut until you are ready to fell the tree.

Acknowledgement of Receipt of Avalonia's Chainsaw Policy

In consideration of my wish to perform volunteer work using a chain saw with Avalonia Land Conservancy, I, _____, have been provided with a copy of Avalonia Land Conservancy's Policy Statement on Chainsaw Use by Volunteers on Avalonia Properties. I hereby acknowledge receipt of this policy.

I acknowledge that any chainsaw work involves certain known and unknown hazards that could result in serious injury, permanent disability, or death. Known hazards include being cut by the chain saw, being struck by falling trees, limbs, or portions of the trunk, and being struck by objects that fall from overhead trees or are thrown through the air when a tree or portion of a tree falls. I further acknowledge that I have the right to refuse to participate in any activity that I feel is unsafe or exceeds my abilities.

Signature

Date

Printed Name, Address, and Phone No.

APPENDIX B: INSTRUCTIONS FOR BLAZING TRAILS

Avalonia's policy is to follow the Appalachian Mountain Club guidelines for blazing trails. You can find their complete instructions in their *Adopter Handbook* at www.outdoors.org/.

The general guidelines are as follows:

- Use oil-based paint (ask your town committee committee chair for paint)
- Use a 1" brush
- Blazes should be 2" x 6" long
- Preferably blazes should be placed on live rather than dead trees
- If possible, use smooth-barked trees
- Blazes should be about 6 ft. off the ground
- In general, there should be no more than one blaze within sight at a time

Tips for painting blazes:

- Scrape the trees bark lightly first (do not debark the tree, but your painting surface should be smooth)
- Carry a template as a guide
- It is not recommended to use a stencil as they often lead to paint runs or drips
- Paint a 2-inch wide by 6-inch tall rectangular blaze;
- After painting blaze, use a rag to touch up any drips or runs so that only a rectangle remains
- Paint blazes going one direction along a trail first, then paint them in the return direction.

Use the following convention to point out where a trail turns.



Straight Trail Blaze



Trail Turns Left



Trail Turns Right

APPENDIX C: AVALONIA LAND CONSERVANCY TOOL POLICY

This policy applies to all equipment and tools owned by Avalonia Land Conservancy (ALC). All tools and equipment owned by ALC are for use by ALC representatives on ALC property only unless specifically authorized by the Stewardship Committee. Any expenses for fuel or maintenance of equipment are an ALC responsibility and will be reimbursed by ALC. Submit a receipt or request for funds to the ALC treasurer. Personnel using the tools or equipment are responsible for wearing the proper safety equipment whether or not ALC provides such safety equipment. ALC maintains liability insurance for injuries occurring through normal operations. Liability for neglect or misuse of such equipment or tools is a personal responsibility of the user.

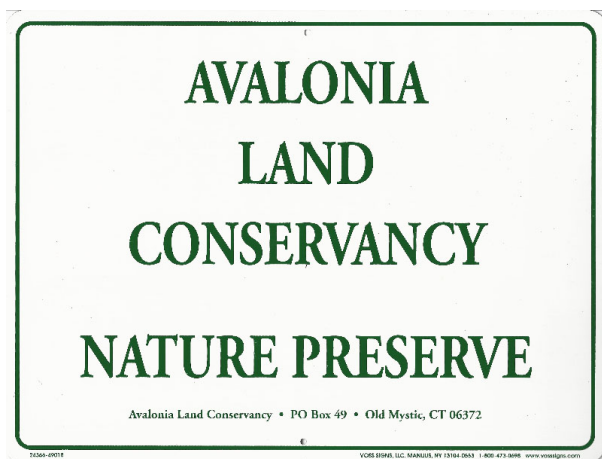
The Stewardship Committee shall maintain a list of all tools and equipment owned by ALC under the Stewardship Committee's management.

A member of the Stewardship Committee or of a town committee should be assigned responsibility for each tool or piece of equipment. This responsibility is limited to being the point of contact for persons wanting to use the equipment and for instructing the person in the proper use of the equipment if appropriate. At all times the responsible person should know who has possession of the equipment. Equipment is not to be passed between users without notification of the responsible person. The responsible person should notify the Stewardship Committee when he or she is unavailable so that equipment can be made available during the absence.

Equipment should be kept in good working order and any repairs should be carried out in a timely manner. Repairs can be made by the user, the responsible person, other Stewardship Committee or town committee representatives or by professionals depending on the difficulty. All repairs should be reported to the Stewardship Committee prior to starting the repair if substantial cost or effort is involved. It is the responsibility of users to identify any malfunctions, maintenance requirements, or needed repairs to the responsible person or the Stewardship Committee.

Approved by Avalonia's Board on November 13, 2013

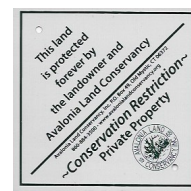
APPENDIX D: COMMON SIGNS USED BY AVALONIA LAND CONSERVANCY



12" x 9" boundary sign used along roadsides and at corners



4" x 4" boundary sign used on interior boundaries



4" x 4" boundary sign used for conservation easement boundaries



Preserve regulations sign posted at entrance to preserves



QR code posted at entrance to preserves



No motorized vehicle sign posted at entrance to preserves

APPENDIX E: AVALONIA LAND CONSERVANCY WATERFRONT PROPERTY USAGE

AVALONIA LAND CONSERVANCY, INC. POLICY STATEMENT

WATERFRONT PROPERTY USAGE

This policy statement applies to public usage of all Avalonia Land Conservancy, Inc. properties having water frontage. (all exceptions to this policy are by deeded rights or other written instructions from the donor only)

IT IS THE POLICY OF THE AVALONIA LAND CONSERVANCY, INC. (AVALONIA) THAT NO BOATS BE STORED ON, OR DOCKS OR OTHER STRUCTURES BE ATTACHED TO, ANY OF ITS PROPERTIES HAVING WATER FRONTAGE, UNLESS SUCH RIGHTS ARE CONTAINED IN THE PROPERTY DEED OR SUCH USE IS DOCUMENTED IN OTHER WRITTEN INSTRUCTIONS FROM THE DONOR.

EXCEPT WHERE OTHERWISE POSTED, AVALONIA SUPPORTS THE USE OF ITS WATER FRONTAGE PROPERTY FOR NON-COMMERCIAL, PUBLIC, COASTAL OR FRESHWATER ACCESS (SUCH AS SHORE FISHING, HAND CRABBING, AND THE HAND LAUNCHING OF CANOES, KAYAKS, AND OTHER NON-MOTORIZED WATERCRAFT).

This policy statement was developed by the Avalonia Stewardship Committee and was approved by the Avalonia Board of Directors during their September 20, 2006 meeting.

FILE: Avalonia Land conservancy, Inc. Waterfront Usage Policy Statement 10/23/2006

APPENDIX F: CONSERVATION EASEMENT MONITORING PROCEDURES

Pre-monitoring Checklist

From the files:

- Make copies of each property info sheet and easement you will be monitoring
- Read through the office file and copy any correspondence that seems pertinent.
- Copy maps if possible – photograph and print if not
- Copy from the file information that will assist you in finding the property (note – do not confuse owner address with property address – they are not always the same). This process may likely involve some clue searching and computerized mapping service (maps.live.com, town GIS files, etc.)
- Take notes on any previous monitoring issues and/or violations.
- Read and abstract each conservation easement for quick reference in the field **[DO NOT TAKE THE ACTUAL EASEMENT DOCUMENT WITH YOU INTO THE FIELD]**.
- Confirm current ownership using most current contact information and file notes. This process may involve town hall research.

If so:

- First check the town hall website to see if any information can be found on line. Follow general information below to do on-line searches.
 - Take deed and any location information to the town hall.
 - Find property on tax map if possible.
 - Use map/lot numbers to find assessors index card. This card should have the current owner info and the book/page of the latest deed. Find and copy latest deed (and previous deed if not same as the conservation easement grantor).
 - If you cannot locate the property on the tax map even with trial and error, use the town's search options to look up the last known owner and forward reference new ownership (ask town clerk for assistance).
 - Use town search options to look for new property surveys or plats of the location (surveys are often referenced from the deed). If the property likely borders new development or potential problem area, try to find a copy of the survey plat of that development.
 - Remember to take a checkbook or small change to pay for copies and blueprints. (Copies are usually \$.50-\$1 – blueprints more).
-
- Contact current owner (preferably via postal mail) and inform them of the upcoming monitoring visit.
 - Invite the owner to set the date, or give them your expected date and invite them to join you. Landowner presence is not necessary.
 - Follow up with the owner before you visit – use that time to get any information from them that they think you should know (i.e. – “have there been any issues out there?” or “is there anything I should know before we meet?”)
 - Use the ‘Equipment and Skills Checklist’ to prepare for the field visit.

Easement Monitoring Visit Equipment and Skills

You will probably need:

Good compass
Field sketchbook and pencil
Camera (digital preferred)
Map of the property
Flagging tape
Conservation restriction abstract / notes
Blank monitoring form
Carry a cell phone for safety
Check local hunting seasons and wear blaze orange if necessary
Directions to the property
Clipboard

Also very useful:

GPS unit
Additional maps
100' measuring tape or measured line.
Past monitoring reports
Skills - You should know how to:
Use a good compass (and account for declination)
Pace a distance
Sight a line
Take digital photographs with consecutive numbers
Sketch a parcel of land and apply a north arrow

Pre-monitoring Checklist - Review of Documents

I. Review of documents

- a. Available documents (Minimum needed)
 - Conservation easement
 - Map (survey, sketch or tax map)
 - Air photo if at all possible.
 - Pertinent correspondence
 - Current owner info and directions to the site
 - Record of unresolved or possible violations or issues
- b. Helpful extras
 - Photos of the property
 - Dated air photos

- Descriptions of easement history
- Letters showing grantor intent
- Historic correspondence
- Internal memos and letters
- Tax information.
- Past monitoring forms

II. The conservation easement document

a. Outline of a basic document

- Grantor/grantee
- Conveyance of portion or whole
- Area covered (meets/bounds or exhibit “X”)
- Land Use provisions/recitals
- Administrative provisions/boilerplate

b. Reading and interpreting a conservation easement

READ CAREFULLY – it will take several passes to absorb it completely. Read for overall intent and the fine print. You will not be able to say with 100% confidence what is and is not allowed to occur on the property. “Recreational use” can have many meanings. - Leave the fine interpretation up to the lawyers – know enough detail to recognize potential violations.

- Note if the document pertains to the entire parcel or only a portion.
- Note the general restrictions.
- Note exempt activities – i.e. firewood harvest or road improvement.
- Note exception areas and allowances (i.e. – one subdivision of 10 acres or more, house lot “A” allowed for family, two additional barns may be built. Etc) Exceptions are usually present.
- Note any additional allowances, clauses or conditional approvals – i.e. “may cut timber if Avalonia Land Conservancy approves harvest plan”
- Practice on a real document
- Abstract/outline the document in a way that makes sense to you.

On-site Monitoring – Checklist

- Use the ‘Equipment and Skills Checklist’ to prepare for the field visit.
- Check in with owner or others present when arriving.
- Set up camera; date and sign report form.
- While on site, interview the landowner regarding changes that have been made, concerns about management, issues with public access, erosion, or other concerns. If the landowner is not available, send correspondence after the visit.
- Traverse property such that full coverage is ensured. Pay special attention to areas along property boundaries and any areas that have been disturbed. If with the property owner, it is often best to let them ‘take you on a tour’, and then re-visit areas that are of special concern.
- Describe changes in land ownership, land use, status of leases, and conditions as required by the monitoring form.

- Examine improvements and facilities. Photograph and note all structures and improvements including houses, barns, sheds, outhouses, gravel or paved roadways, man-made ponds, gardens etc. Attempt to sketch these improvements on the map as accurately as possible.
- Describe any questionable practices (excavation, dumping, off-road use, tree cutting) that are not explicitly allowed in the easement documents.
- **DO NOT tell the landowner that there is a violation or that something will have to be torn down, changed, filled in, planted or otherwise altered. Notification of violation should only be communicated after following the easement violation protocol and allowing consideration by the Stewardship Committee and President.**
- **DO NOT try to interpret the easement document in the field. Write down any questions the owner has and tell them you will respond after consulting the official document and stewardship committee (and legal counsel if necessary).**
- You may discuss possible issues with the owner if they ask, or if you need clarification on a land use practice or date of construction. Getting their perspective on the issue can be important.
- Describe cultivation practices. Describe generally disturbances in natural plant communities and apparent causes (based on observed evidence, not presumption).
- Describe the presence and extent of invasive/noxious weeds if easily noted.
- Indicate whether erosion problems are static, worsening, or stabilizing and describe control efforts. At a minimum, significant erosion sites and those exhibiting changes should be photographed and located on the field aerial.
- Describe and photograph activities that may have an impact on water quality. Do not conclude that water quality is being degraded on the report

Photographs:

- The first photograph for each property should be of a dry-erase or piece of paper clearly marked with property name and date.
- Be concise to minimize the number of photographs required while assuring sufficient documentation.
- For each photograph taken, record photograph number, subject, location description, focal length (wide vs. zoom) and azimuth bearing on the report form. Mark the location of each photograph on the aerial.
- Describe photograph location in relation to permanent or semi-permanent landmarks (rock outcrops, fence corners, trees) that can be easily identified.

When finished, inform landowner that you are leaving and thank them for their hospitality. If an additional visit will be required, set up a mutually agreeable time within a week.

Post-visit Checklist

- Develop film to 4x6 prints or print digital photos.
- Label photos in archival quality ink with date, property, monitor signature, subject, and photograph number.
- Transcribe report form if field copy is not legible. Sign it.
- Draft a follow up letter to the landowner to thank them for the visit and to inform them of general findings. Refer briefly to issues of concern and compliment good practices as

appropriate. Include information about Avalonia Land Conservancy's intent for the easement if possible / necessary.

- Summarize findings, particularly significant changes or problems that are pertinent to the easement, to the Stewardship Committee, Town Committee and President. The Stewardship Committee chairman should sign the report in the "approved" box. Hard copy should be put in easement binder and electronic copy stored in easement folder on the office computer.
- The Stewardship Committee Chairman also reviews the post-monitoring letter to the landowner before mailing.
- If there is a potential easement violation, follow the steps same steps in the encroachment violation protocol or according to the specific easement document.

APPENDIX G: CONSERVATION EASEMENT DOCUMENT SAMPLES

Sample Text of Initial Letter

{Date}

{Name}

{Address}

{City, Town}

Dear {Name},

Internal Revenue Service Form 990 (which non-profit organizations are required to file annually) now requires that Avalonia Land Conservancy annually monitor and document each conservation easement that has been granted to us in order to fulfill our responsibility to ensure that these properties are protected as the easement grantors wished, and that they are in compliance with the terms of the conservation easement.

Representatives from Avalonia Land Conservancy's stewardship committee will be monitoring your easement this year and plan on visiting the property at _____ <enter address> _____ on _____ <enter date> _____ at _____ <enter time> _____ AM / PM. It would be great if you could join Avalonia's representative(s) for the visit, but understand if you are not available to do so.

In addition to our review of the easement lands, these monitoring visits also provide you an opportunity to ask any questions about your conservation easement, and to discuss any changes that have occurred on the property, your plans for the property, or activities that may require the Land Conservancy's notification or approval.

If you have any questions or issues to discuss at this time, please feel free to contact Avalonia Land Conservancy at 860-xxx-xxxx or via email at _____@avalonialandconservancy.com

Finally, please inform ahead of time anyone on the property who should be made aware of the visit, and restrain dogs or other animals that do not respond well to visitors.

Sincerely,

{Name}

Avalonia Land Conservancy – Stewardship Committee

Sample Text of Post Visit Letter

{Date}

{Name}

{Address}

{City, Town}

Dear {Name},

As you know from the letter that was sent to you in {insert month}, an Avalonia Land Conservancy stewardship committee representative(s) recently conducted a site visit to your protected property on {INSERT DATE}.

During the visit, a visual inspection to monitor the activities on the property as they relate to the terms of your conservation easement was performed. This letter will serve as a record that the monitoring visit did not reveal any activities that conflict with the terms of the easement. This letter will be placed on file in the conservancy's office as well as in our archives.

To assist us in our easement administration and stewardship efforts, we ask that you take a moment to notify us of any anticipated changes in land ownership within the coming year (such as a sale, transfer or lease) or if you are planning any building or landscape improvements on the protected portions of your property. Depending on the terms of your easement, certain activities (such as subdivision, residential construction, or timber harvesting) may require notice to, and / or approval by Avalonia Land Conservancy prior to commencing the planned activity.

In addition, feel free to contact the conservancy regarding land management questions regarding your easement property. If we cannot answer your questions directly, we will do our best to put you in contact with the appropriate professional specializing in that area.

And as always feel free to contact Avalonia at any time if we can be of assistance. Thank you for your continued commitment to land conservation here in Connecticut.

Sincerely,

{Name}

Avalonia Land Conservancy – Stewardship Committee