



SAKONNET PRESERVATION ASSOCIATION, INC.

CONSERVATION EASEMENT MONITORING PROCEDURE

1. The Sakonnet Preservation Association (the Association) shall monitor its easements regularly, at least annually, in a manner appropriate to the size and restrictions of each property. Documentation shall be kept of each monitoring visit such as reports, updated photographs and maps. The following procedure clearly describes each step of the Association's monitoring process to ensure that all properties are inspected in a similar manner.

2. PROCEDURE

2.1. Schedule property monitoring: The Stewardship Committee Chair shall annually schedule easement monitoring of each property to occur approximately within 365 days of the previous visit. Easement properties with a greater potential for violation, as determined by the Committee Chair, shall be monitored more frequently than once a year.

2.2. Schedule the visit: In advance of the monitoring visit the monitor or Committee Chair shall attempt to contact the landowner or representative by phone or electronic mail to invite him or her to be present for the property visit. (The landowner's/representative's phone numbers are kept on file in the property's Stewardship Binder in the Association's office.) The caller shall explain the monitoring visit, address the topics listed under "Details conversation/communication:" of the inspection report form, invite the landowner to accompany the monitor on the visit, and welcome questions. Every effort shall be made to accommodate the landowner's schedule and preferences. When unable to contact the landowner by phone, the monitor or Committee Chair shall send a letter two weeks in advance of the visit with the above information to all addresses on file and retain a copy of the letter. Should the landowner not respond, the letter shall serve as official notice of the monitoring visit and the copy shall be filed in the property's permanent file as well as the property's Stewardship and Office Binders in the Association's office.

2.3. Review the materials: Shortly before monitoring, the monitor shall review all materials in the property's Stewardship Binder. This shall include, but not be limited to: the Baseline Documentation Report; Conservation Easement document; Management Plan or Management Summary; previous year's monitoring documentation; deed; and all letters, memos and observations, especially those that make note of problems to check or additional information to gather. For the visit, the monitor shall be familiar with the property owner's

rights and restrictions as listed in the Conservation Easement as well as the easement's history and the Association's relationship with the owner in case the owner asks questions.

2.4. Gather materials and equipment:

2.4.1. For the monitoring visit, the monitor shall bring the property's Stewardship Binder, an Association's Easement Monitoring Inspection Report (Report), pens/pencils, notepaper, camera, film and extra batteries (or disposable camera) and an orange vest that is stored in the office.

2.4.2. Additional useful items that may be brought include a laser range finder, a field measuring tape and/or a GPS unit that shall be stored in the Association office. Other items which may be needed are a compass, insect spray, gloves and binoculars, and any tools used to assist in boundary location.

2.5. Conduct the monitoring:

2.5.1. Monitoring of the Association's easements shall be conducted by ground monitoring. The monitor shall review the easement terms with the landowner if possible walk the property following the property's Baseline Documentation Report Photo Points and visit all areas of special concern. The monitor shall check the boundaries of the easement property and note on the Report if unable to locate all boundary markers and why. The monitor shall check all areas of the land affected by landowner reserved rights or special easement restrictions. If the easement provides public access, the monitor shall check access areas to make sure they are open and safe.

2.5.2. The monitor shall compare the current property condition with the Baseline Documentation Report photos and written observations and, if available, photos from the previous monitoring visit and shall document any major changes in property conditions or land use. The monitor shall record with photos and notes any significant changes caused by natural processes such as damage from insect infestation, storms, erosion or other natural occurrences. The monitor shall ask for permission from the landowner, if present, before taking photographs, explaining why photos are useful in meeting the Association's stewardship responsibilities. This may further educate and engage the landowner in the stewardship of the property and help maintain cordial relations between the landowner and the Association.

2.5.3. Any man-made changes to the property shall also be documented. If there is any question there might be a violation, the monitor shall take photos, make notes, and immediately following the monitoring visit, follow the procedure outlined in the Association's adopted Easement Violation Response and Resolution Policy.

2.5.4. The monitor shall record from the boundaries any major changes in abutting property use. Where possible, photographs shall be taken from the nearest established photo points as recorded in the Baseline or previous monitoring reports. New photo points should be established only if

necessary. The monitor shall note the location from which the photos are taken for later photo map recording and shall compile a list of photos taken. The monitor shall also make written notes about his/her observations to accompany the photographs.

2.6. Complete the Documentation: The monitor shall fill out a Report and submit it within three weeks of the property visit to the Stewardship Committee Chair for review. At a minimum, the Report shall include: name, address and signature of the monitor; monitor's affiliation with the Association (e.g. Board member, volunteer), date of inspection; current property owner's name and address; location (address) of property; presence or absence of landowner; comments on the condition of the property; notes on compliance with any special easement restrictions and whether the property appears to be otherwise in compliance with the terms of the easement.

2.6.1. The monitor shall send only photos that represent a change to the Association electronically or submit 3" x 5" photos and negatives with the Report. Upon review by the Stewardship Committee Chair or Administrative Assistant, each printed photo shall be marked, using an acid-free marker or pen, with: the property name, date the photo was taken, photo number and the established or new photo point, the location description and the signature of the photographer and/or Association member who can attest to its accuracy and his/her role with the Association (e.g., volunteer monitor, or staff position). The monitor or Committee Chair shall mark any new photo points on a copy of the original Baseline Documentation Report Photo Point Map and sign and date any new maps and notes.

2.6.2. Originals of the photos, new maps and notes, and the Report shall be stored according to the Association's adopted Records Policy. Copies shall be stored in both the Office and Stewardship Binders for the property in the Association office.

2.6.3. If any potential violations are noted, the monitor shall report them as soon as possible to the Stewardship Committee Chair, who shall inform the President. The monitor, Committee Chair and/or President shall revisit the property as soon as possible to compare the property condition with the exact terms of the easement. If a questionable activity or potential violation exists, they shall document the situation and proceed according to the Association's Violation Policy.

2.6.4. If no potential violations are noted, the monitor and the Stewardship Committee Chair shall notify the landowner in writing that the Association has inspected the property and that it appears to be in compliance with the terms of the easement.

3. Evaluation of Monitors: Following the Stewardship Committee Chair and/or the Stewardship Committee's review of the Report, the Stewardship Chair shall communicate to the volunteer monitor any procedural deficiency(s) that have been

noted, suggest recommendations for correcting such and offer guidance. If the inadequacies are not corrected during the following year's monitoring assignment, the monitor shall be invited to step down from his/her monitoring duties by the Stewardship Chair or President and thanked for his/her service to the Association.

Revision History

4/16/2008– Adopted by SPA Board of Directors

10/13/2010 – Revisions approved by Stewardship Committee

1/10/2012 – Revisions approved by Stewardship Committee

4/10/2013 – Revisions Approved by Stewardship Committee