

Resources Agency Project Tracking & Reporting (RAPTR)  
System  
Stakeholder Workshop  
**ACQUISITIONS & EASEMENTS**  
**JULY 15, 2020**

Welcome! Thank you for joining us today.

**Video option on.** We hope you will feel comfortable using the video feature to help everyone feel connected. [Use the video camera icon button on the bottom left of the screen to turn on your video.]

**Muting.** Please keep your audio muted at all times, unless instructed by the facilitator to unmute.

**IT support.** If you need support, please contact Julia Van Horn at [jvhorn@raptr.com](mailto:jvhorn@raptr.com)

The Meeting will begin at 10:00AM

The Resources Agency Project Tracking & Reporting System  
(RAPTR)

**Acquisition and Easements Workshop**



# Guidelines for Remote Conversation



**Remote meeting.** Remote collaboration meetings can be challenging and frustrating – please be patient and flexible.

**Audio/Video.** We want to see and hear you, but please only have your mic and video on while you're speaking.

## **Participation:**

- **Chat Panel** can be used to add comments and questions. We may not go through all of them during the meeting, but we will incorporate your comments and address your questions in the meeting summary.
- **Hand raise** function can be found at the bottom of your Participant panel. Please use the hand raise to get into a queue.

**Collaboration tools.** We will use Zoom polls to get your feedback and breakouts for small conversations and collaborative work.

**Be comfortable.** We will take short breaks throughout the meeting

## **Have fun and be courteous.**

- Honor time and share the airtime
- Think innovatively - We welcome new ideas

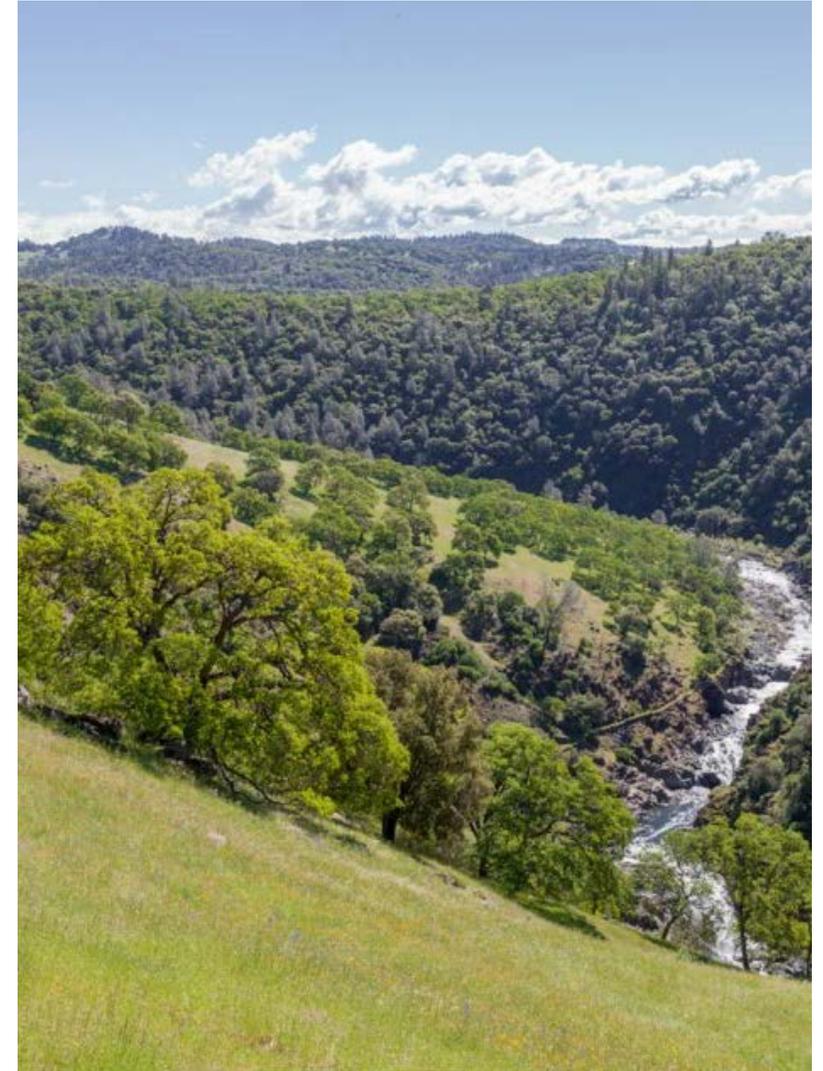
# Workshop Purpose

## Gather stakeholder input to inform the creation of the Resources Agency Project Tracking and Reporting (RAPTR) System by

- Validating the management questions identified during the Kickoff and subsequent engagement among Acquisitions and Easements stakeholders.
- Utilizing a strategic thinking approach to identify key indicators and metrics for Acquisition and Easement projects.

### Key questions to address:

1. What common metrics could be tracked across similar project types to inform project-, program-, and bond-level analysis?
2. Which metrics are most appropriate and realistic to track in a central system?



# Meeting Agenda

- 10:00AM** **Welcome and Introductions**  
*Amanda Martin, Deputy Assistant Secretary for Administration and Finance*  
*Gina Ford, Senior Environmental Scientist, MSU*
- 10:20** **Acquisitions and Easements Overview**  
*Brad Juarros, Environmental Scientist, MSU*  
*Jim Falter, Environmental Scientist, MSU*
- 10:40** **Panel Presentations: Current Efforts in Project Performance Monitoring and Evaluation**  
*Shelton Douthit, Feather River Land Trust*  
*Connie Best, Pacific Forest Trust*
- 11:05** **Stretch Break**
- 11:10** **Guiding Principles and Screening Criteria**  
*Elea Becker Lowe, Environmental Scientist, MSU*
- 11:15** **Breakout Instructions: Leveraging and Evaluating Indicators and Metrics**
- 11:25** **Breakout Session #1**
- 12:10** **Lunch Break**
- 1:00** **Breakout Session #2**
- 1:35** **Stretch Break**
- 1:40** **Breakout Session #3**
- 2:05** **Stretch Break**
- 2:10** **Report Out and Plenary Discussion**
- 2:50** **Wrap Up and Next Steps**
- 3:00PM** **Meeting Adjourn**



Which Department are you from?

**What perspective  
do you bring to the  
discussion today?**

You should see a poll pop-up in  
your zoom screen shortly- thanks  
for participating!

- ✓ Air Resource Board
- ✓ CalFire
- ✓ California Department of Food and Agriculture
- ✓ California Natural Resources Agency
- ✓ California Department of Conservation
- ✓ California Department of Water Resources
- ✓ California Department of Parks and Recreation
- ✓ State Coastal Conservancy
- ✓ Sacramento-San Joaquin Delta Conservancy
- ✓ California Department of Fish and Wildlife



# Welcome and Introductions

Deputy Assistant Secretary for Administration and Finance, CNRA

**Amanda Martin**

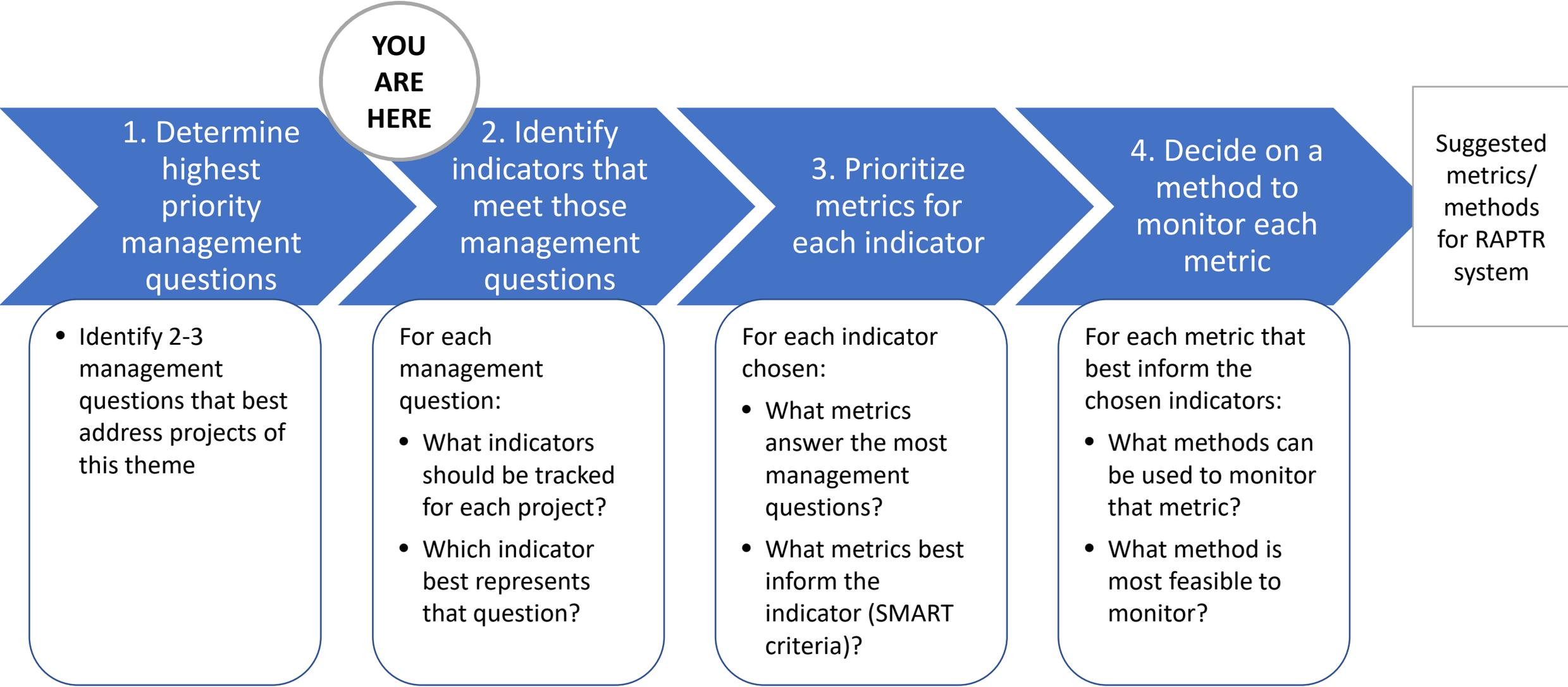




# Background and Overview of RAPTR



# Decision Process





# Acquisitions and Easements Overview



# Bond Accountability Guide

“A department’s documentation of its project and grantee monitoring efforts helps demonstrate program compliance and good grant stewardship.” Bond Accountability Guide

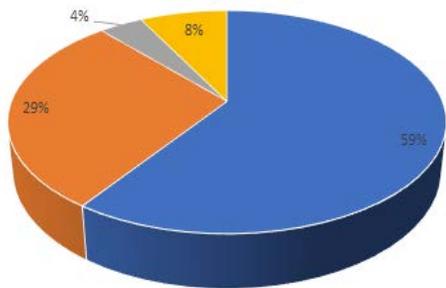
The Bond Accountability Guide advises State agencies to track long-term investments by requiring annual monitoring reports from grantees and by conducting annual site visits (when feasible) to ensure that bond-funded projects are maintained and compliant with the intended purpose of the funding source, the program, and as stated in the project’s grant agreement. Minimum baseline documentation that should be included in post-completion monitoring efforts:

- Annual monitoring Reports
- Annual project photos
- Updates on status of corrective actions planned or taken if project was not in compliance with the agreement purpose.



# Key Findings From Our Project Evaluation

Acquisition Types



Of the 53 Acquisition projects we evaluated as part of our total sample of 389:

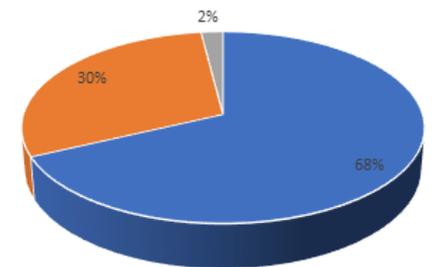
- 59% are Fee Title
- 29% are Conservation Easement
- 4% are a combination of both
- 8% unclear

Of the 53 Acquisition projects we evaluated:

- 68% had a monitoring requirement per the grant agreement
- 32% were unclear or had evidence of at least short term monitoring)

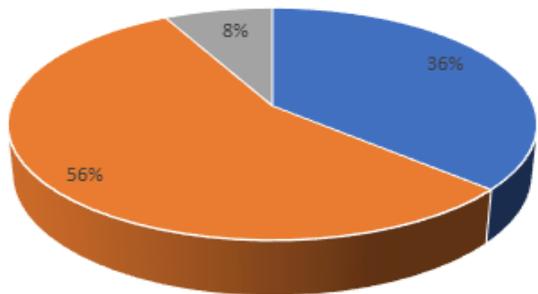
Was monitoring required?

■ YES ■ NOT FOUND ■ SHORT-TERM



Was monitoring reported?

■ YES ■ NOT FOUND ■ INCOMPLETE



Of the 68% that had a monitoring requirement:

- 36% had monitoring reports we could find
- 56% we could not find
- 8% we found some information

# Acquisitions and Easements Management Questions from Kickoff Meeting

## Management/Compliance

Permitted land uses (i.e. ag, habitat, residential and whether nonpermitted uses are occurring).

Has property been sold or transferred to others?

Are there encroachments on the property?

Property location?

Has a conservation easement been recorded, and has it been reported in the CNRA Easement's registry?

Whether the entity that acquired the real property interest is monitoring and submitting annual reports.

Has a mitigation project been conducted on the property and was it allowed under the terms of the agreement and deed restrictions?

Is the easement recorded in FIRST position ahead of other loans? What type of entity holds title?

## Benefits

Are there climate benefits - GHG emissions reductions or increased carbon sequestration?

Climate adaptation benefits like GHG reductions, water quality improvements, flood plain protection.

Are there opportunities for added benefits (e.g. opportunities for restoration, recreation on conserved lands)? Can we track these?

If acquired for public access, is it still accessible to public?

## Access

If acquired for public access, is it still accessible to public?

Has property been sold or transferred to others?

Is public access permitted?

Has a conservation easement been recorded, and has it been reported in the CNRA Easement's registry?

# Management Questions from Kickoff Meeting

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# The Top Management Questions Within Each Area & How They Relate to Each Other

## Management

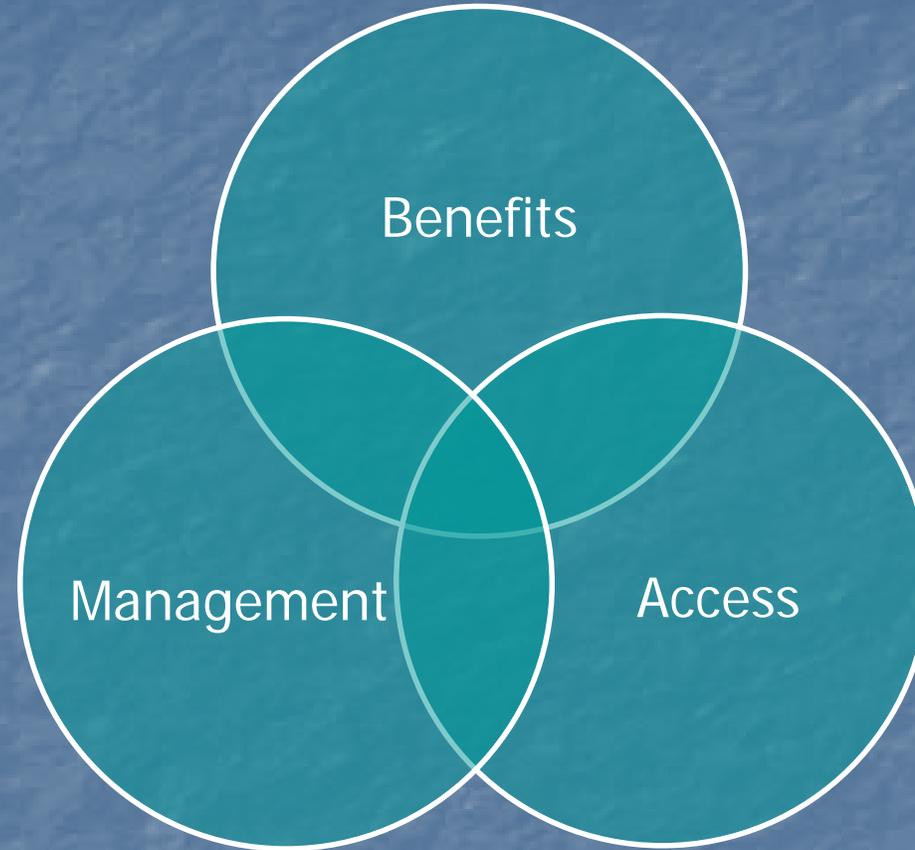
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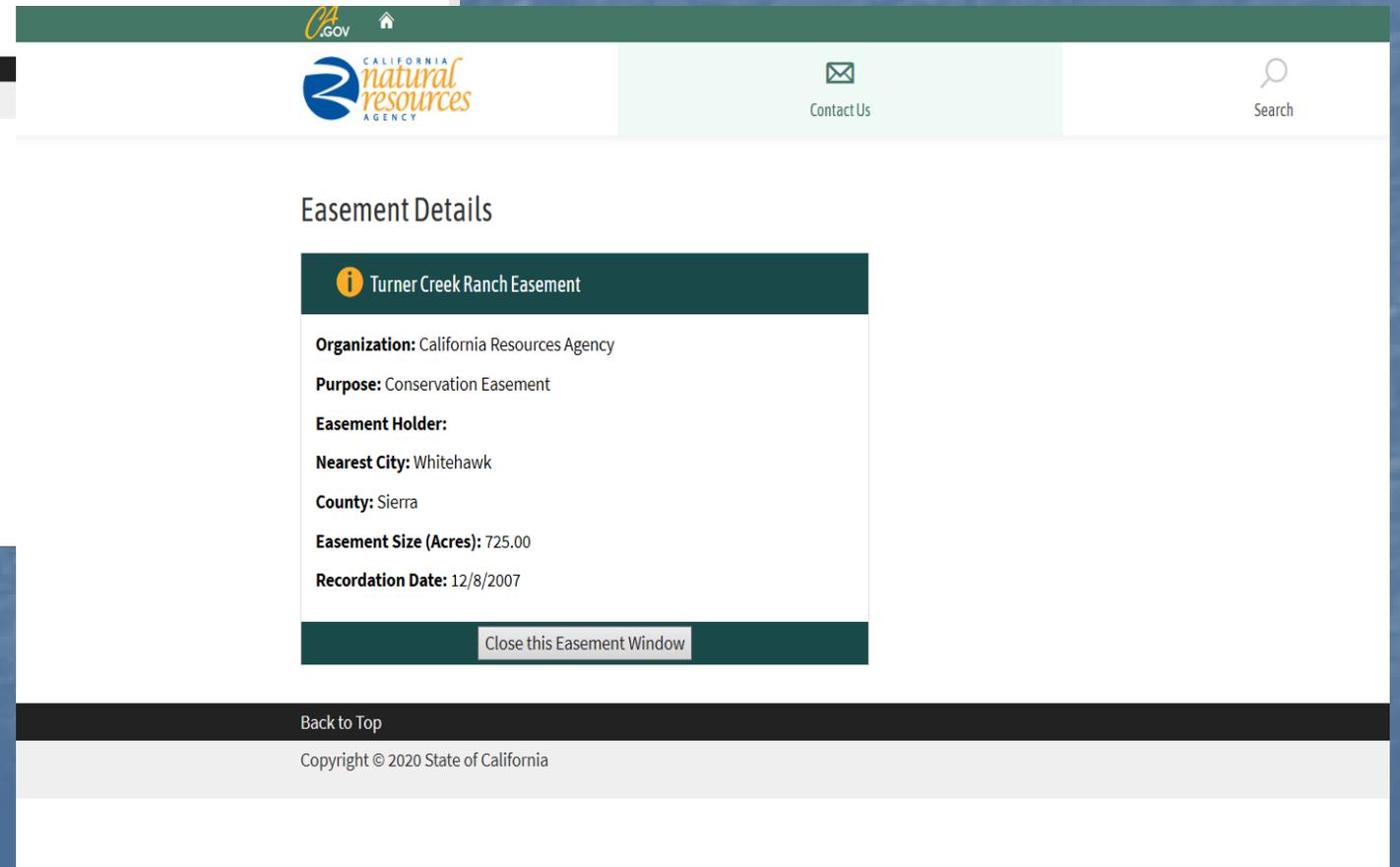
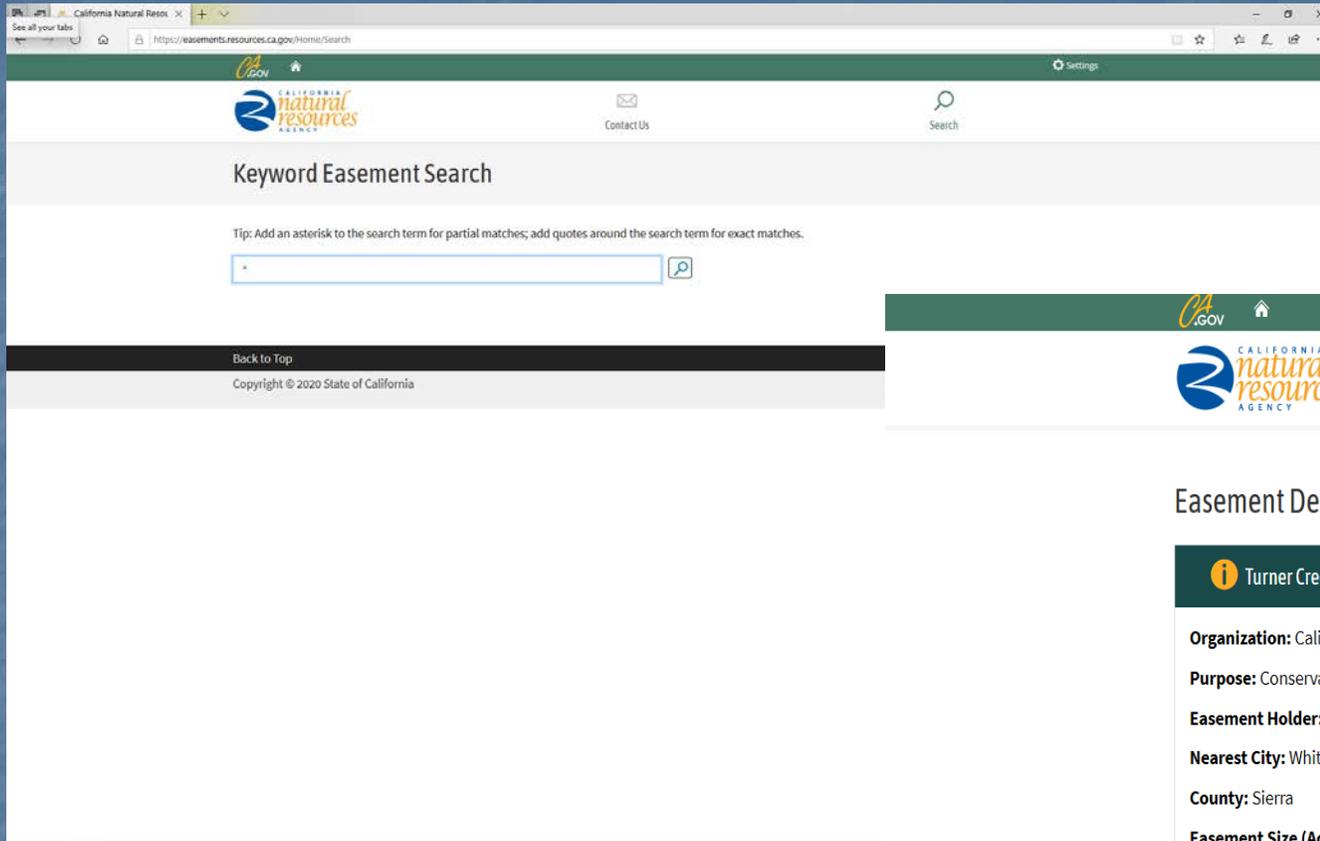
## Access

- \* If acquired for public access, is it still accessible to public?



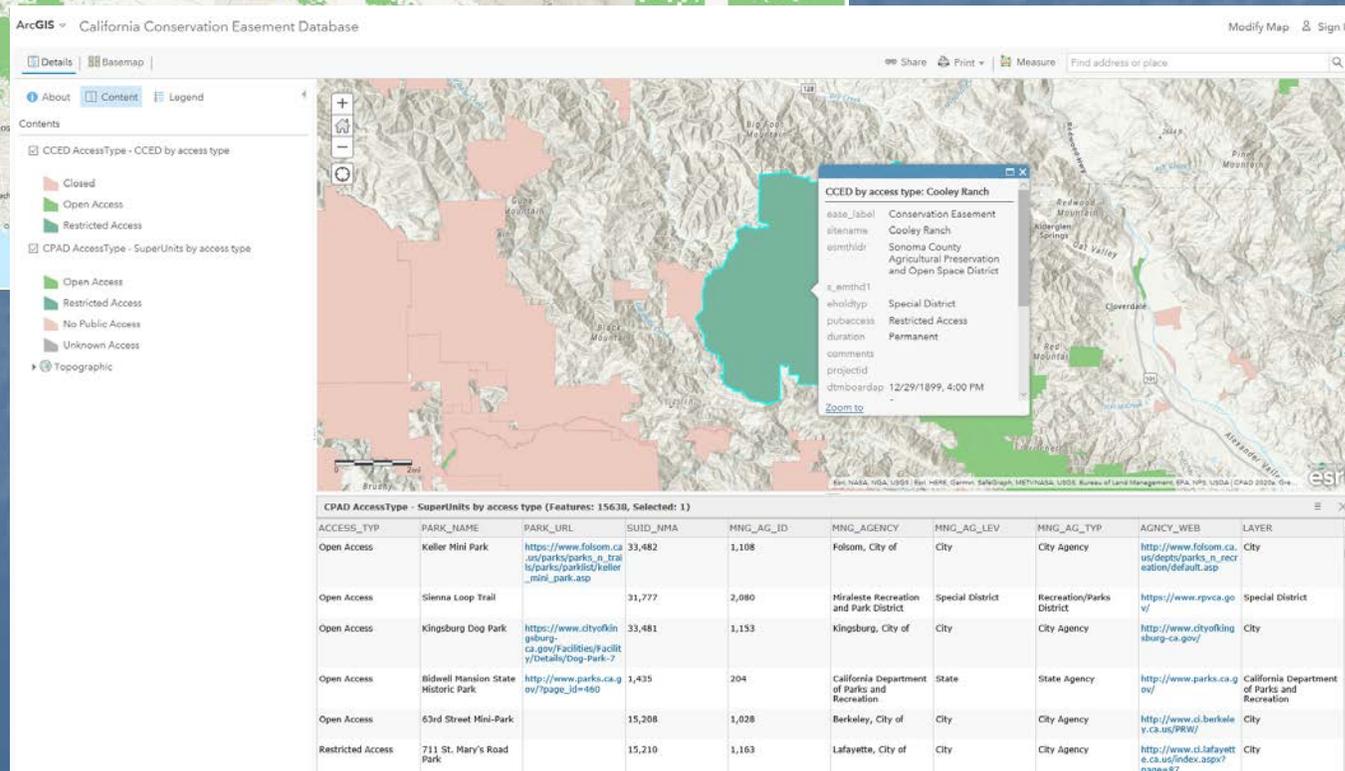
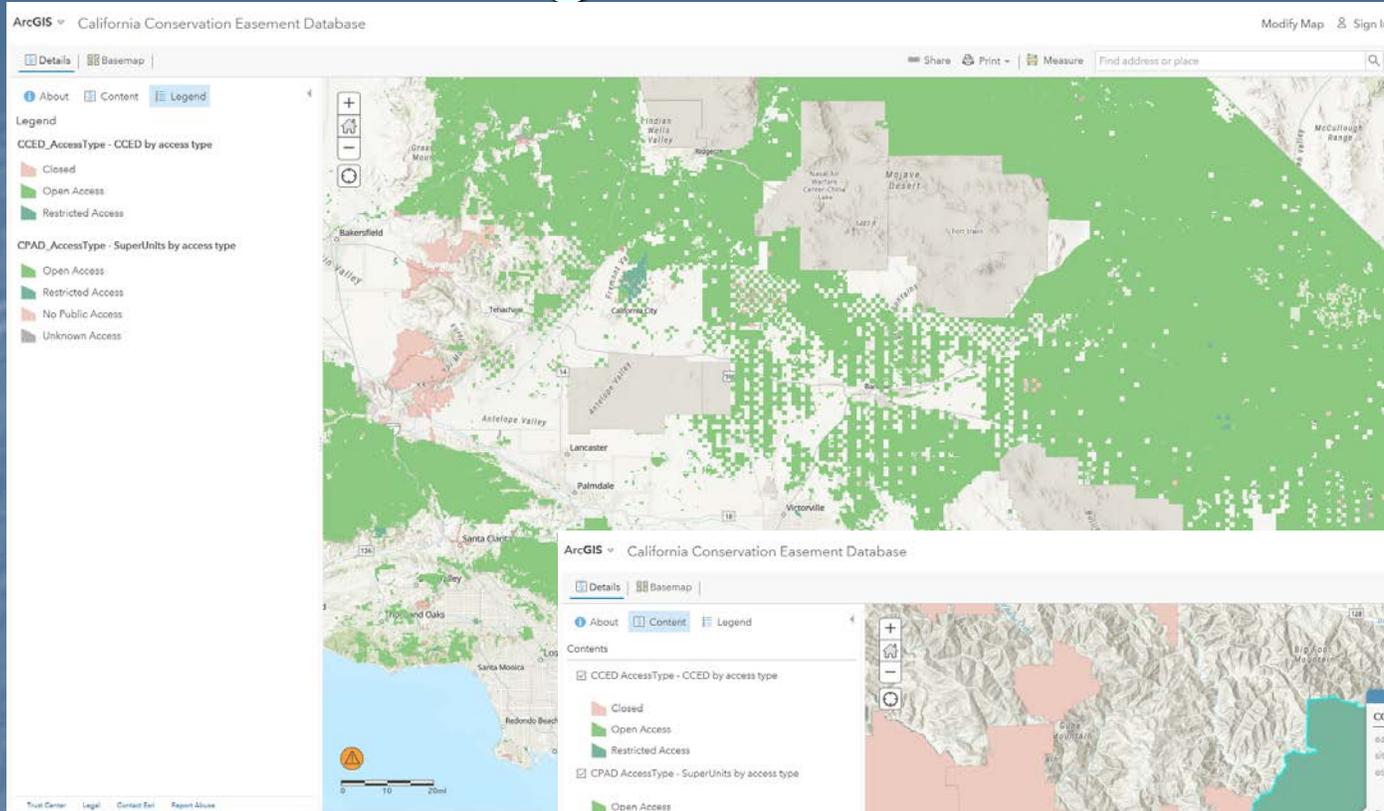
\* The Management Question was identified by more than one agency and opportunity to address management question is high.

# Existing Tools – Conservation Easement Database



California Natural Resources Agency  
Conservation Easements Database

# Existing Tools – CPAD & CCED



- California Protected Areas Database (CPAD)
- California Conservation Easement Database (CCED)

# Key Acquisition Information



# Additional Data

Stakeholder Goals



Indicators/Metrics



Data Collection  
/Analysis



Compliance/  
Ecological Health

What are some other potential indicators/metrics we could collect that can:

- Address specific management questions
- Tell us something about what is happening on-site
- Compliance with conservation easement
- Compliance with grant agreement

# CPAD & CCED Databases

**How familiar are you with the  
CPAD and CCED databases?**

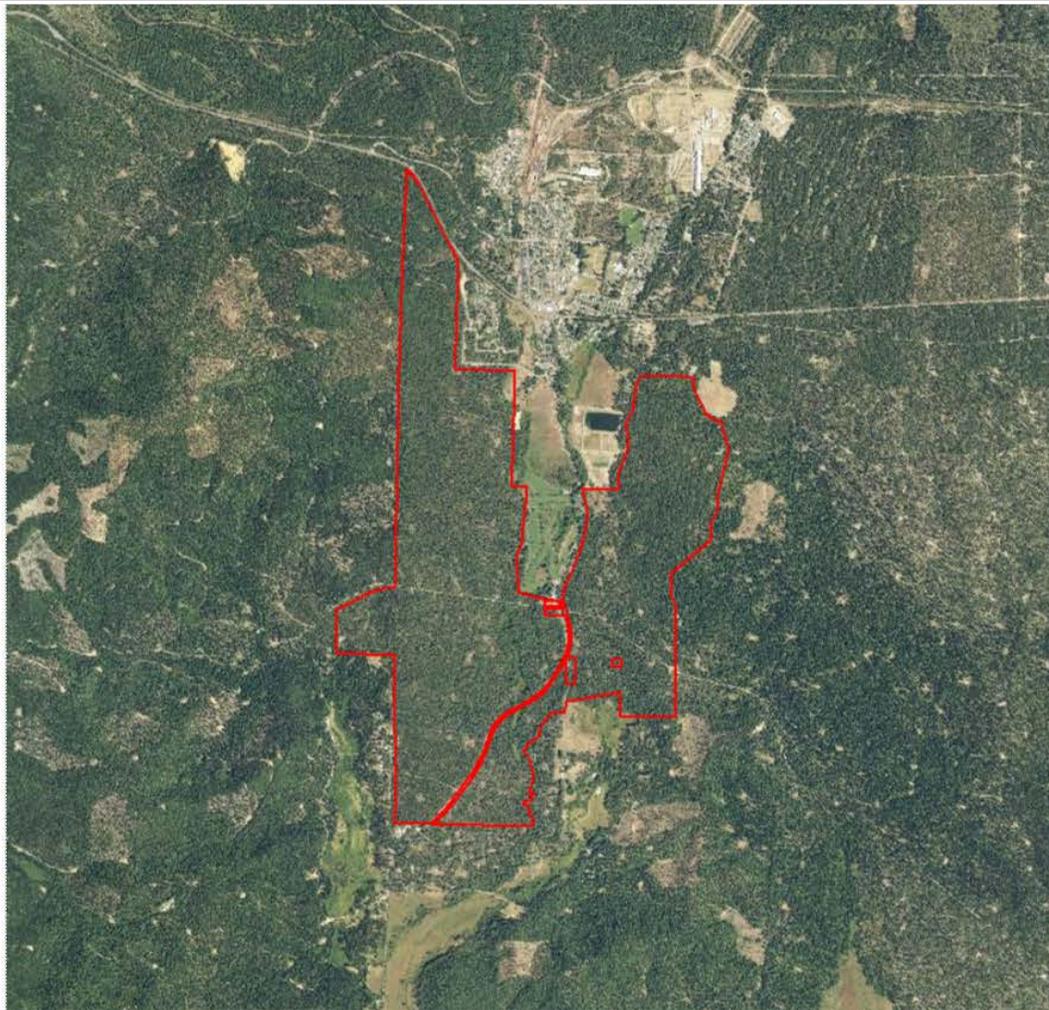
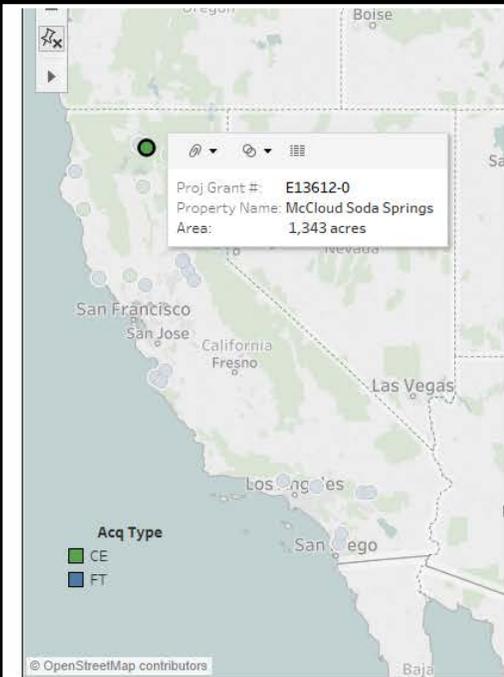
You should see a poll pop-up in  
your zoom screen shortly- thanks  
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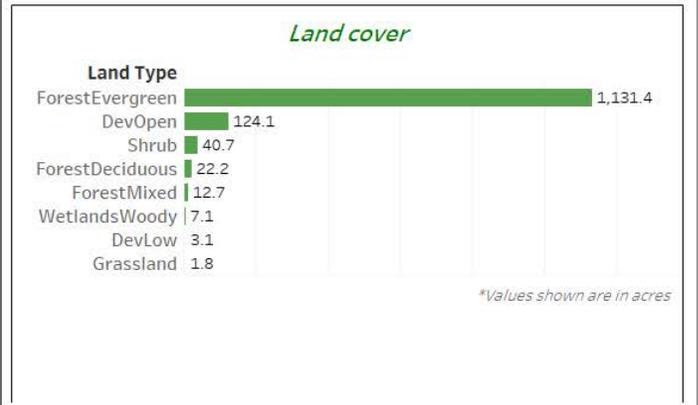
# How RAPTR can inform project management

**Jim Falter**, Environmental Scientist, MSU





riparian habitat in the McCloud watershed, a major tributary to the Sacramento River.  
 Project Location: Squaw Valley Road, McCloud



### Project Specifications

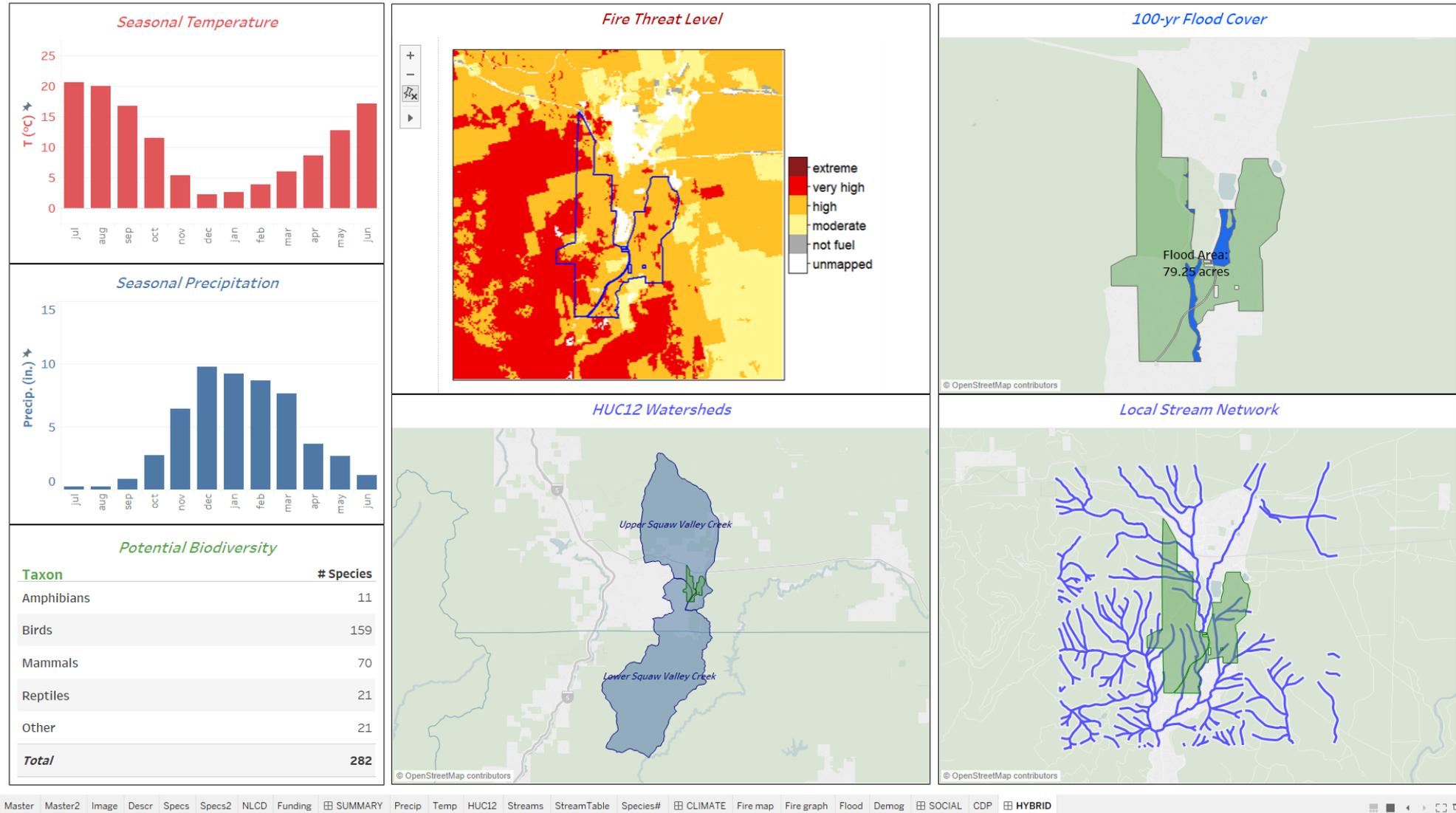
Project Grant #: [E13612-0](#)  
 Property Name: [McCloud Soda Springs Working Forest Conservation Easement](#)  
 Area: [1,343.2 acres](#)  
 County: [Siskiyou](#)  
 Manager: [NA](#)  
 Access: [Restricted Access](#)  
 Program: [Environmental Enhancement & Mitigation Program](#)  
 Funding Source: [EEMP](#)

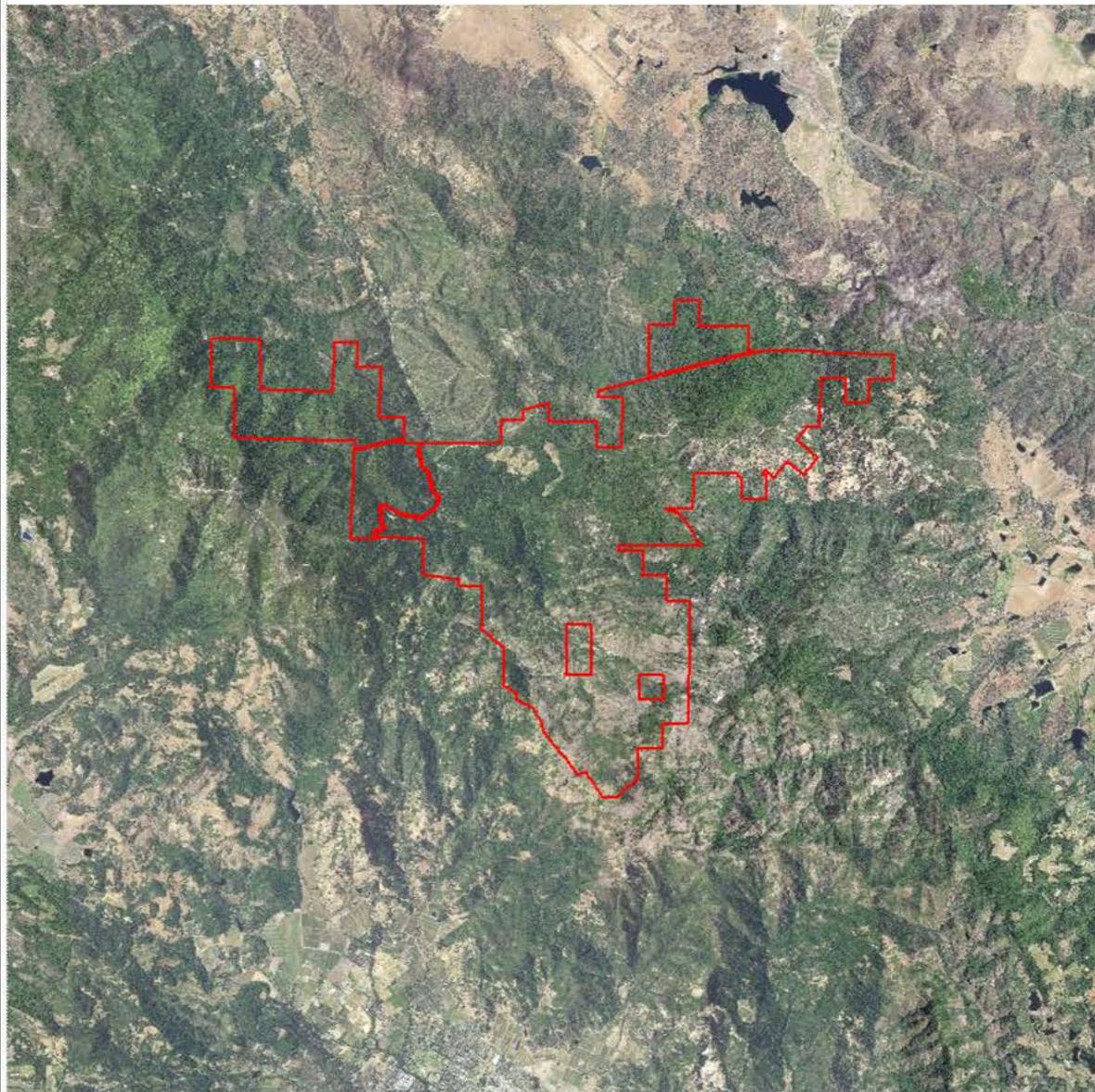
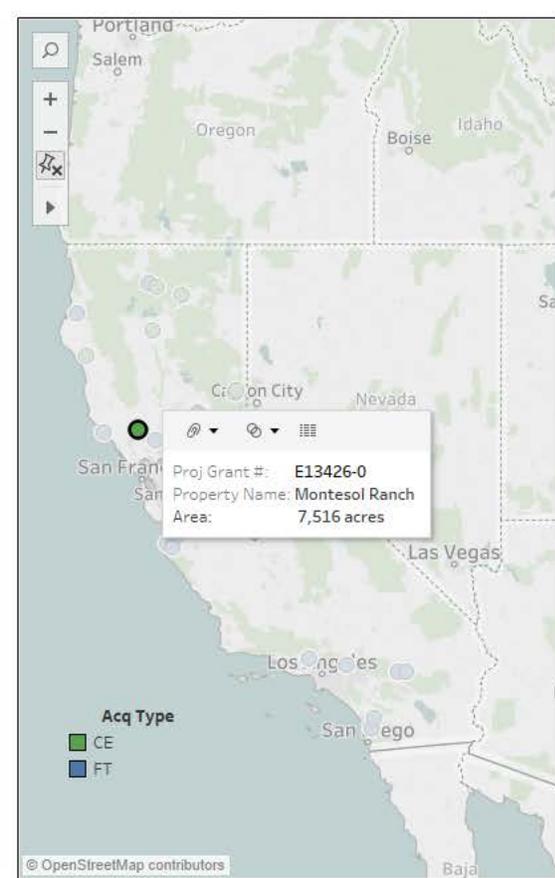
### Funding Sources

Class	Sponsor	Amount
Non-Profit	Landowner	\$198,000
	Others	\$93,000
	PFT	\$9,000
State-Other	WCB	\$800,000
	EEMP	\$500,000
	CDFW	\$200,000
<b>Grand Total</b>		<b>\$1,800,000</b>

Summary of possible dashboard for Acquisitions

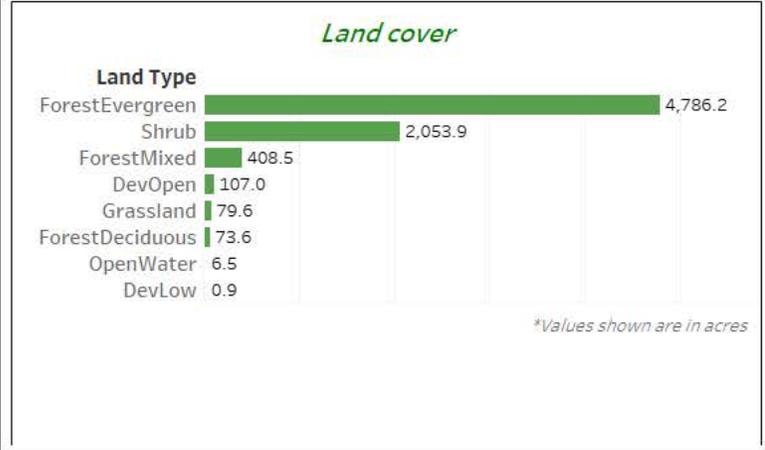
# Summary of dashboard for key climate and environmental data





*Description*  
 Conservation Easement protecting over 7,200 acres of Montesol Ranch

# Example of a representation of the landscape



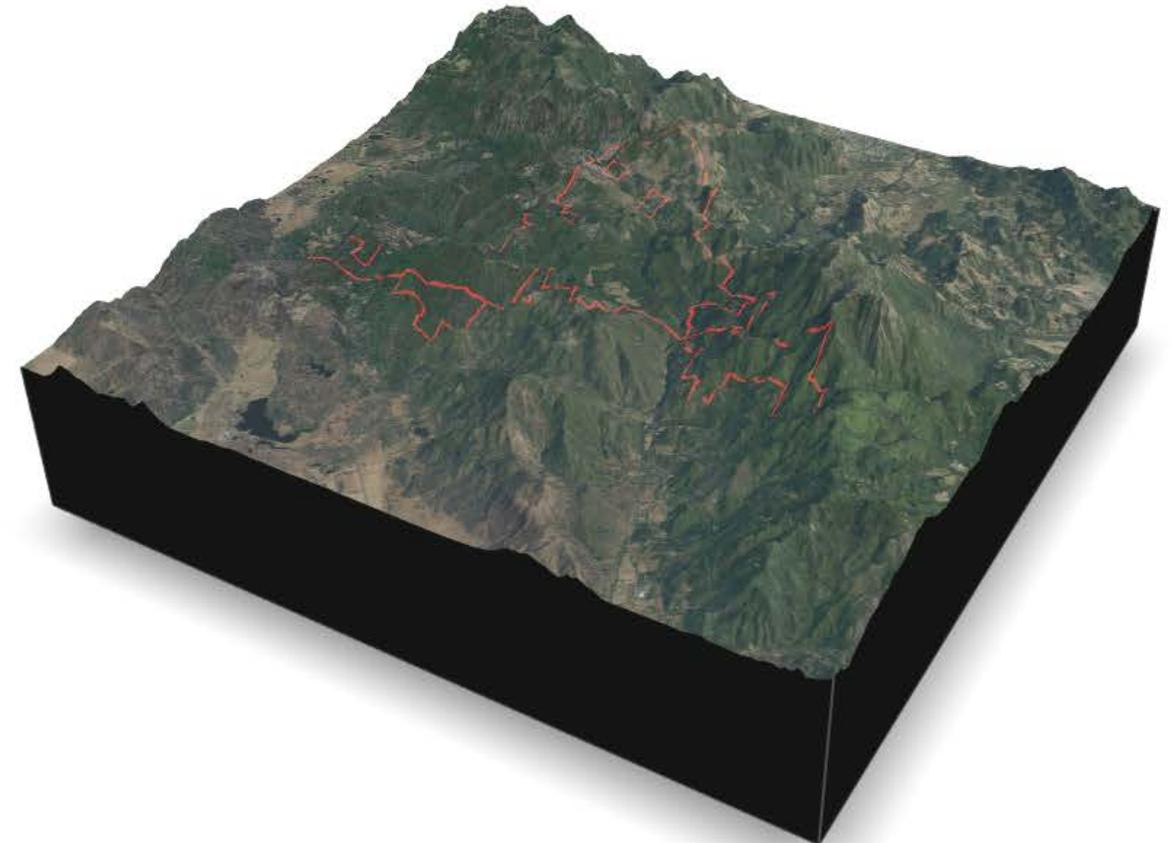
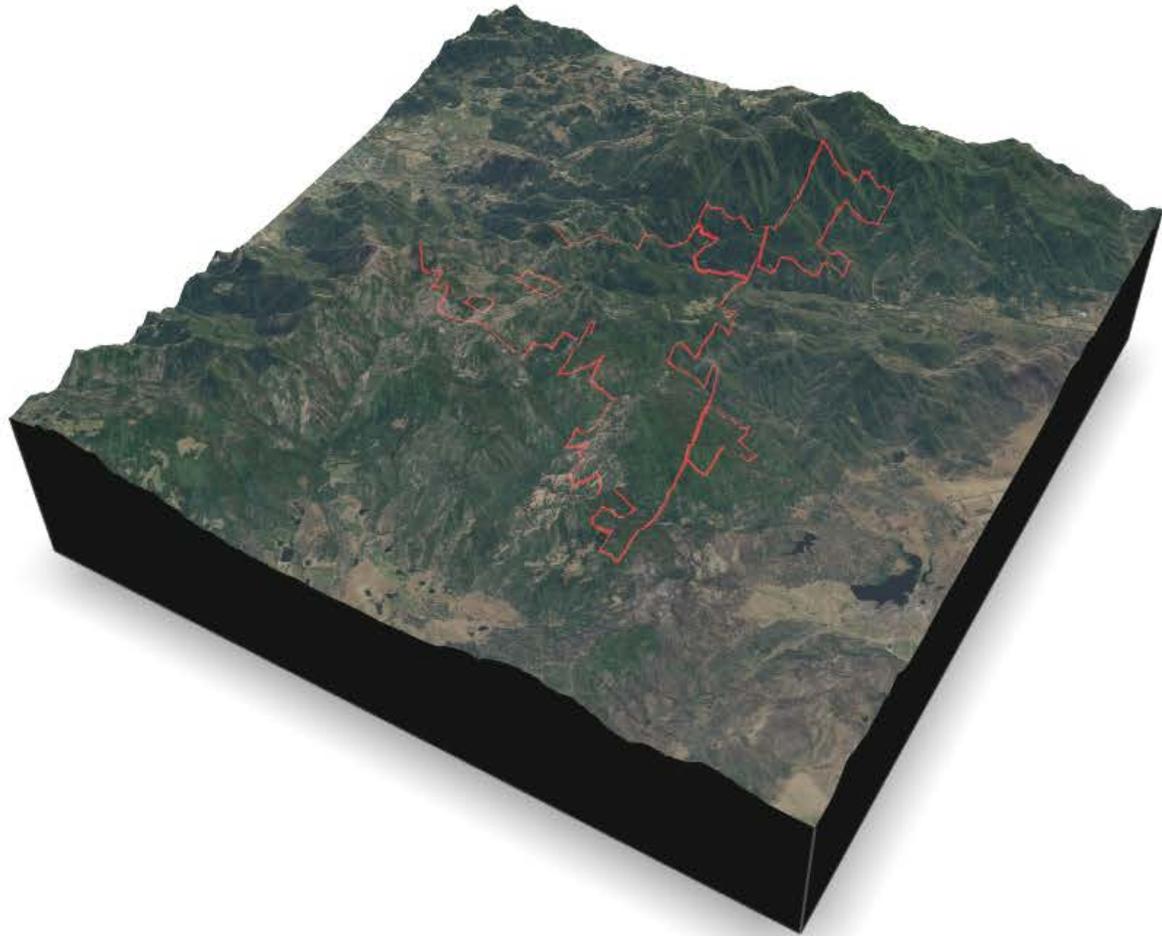
**Project Specifications**

Project Grant #: [E13426-0](#)  
 Property Name: [Montesol Ranch](#)  
 Area: [7,516.3 acres](#)  
 County: [Lake, Napa](#)  
 Manager: [NA](#)  
 Access: [No Public Access](#)  
 Program: [Environmental Enhancement & Mitigation Program](#)  
 Funding Source: [EEMP](#)  
 Date Completed: [1/24/2018](#)  
 Elevation: [691 ft.](#) [433 to 1,110]

**Funding Sources**

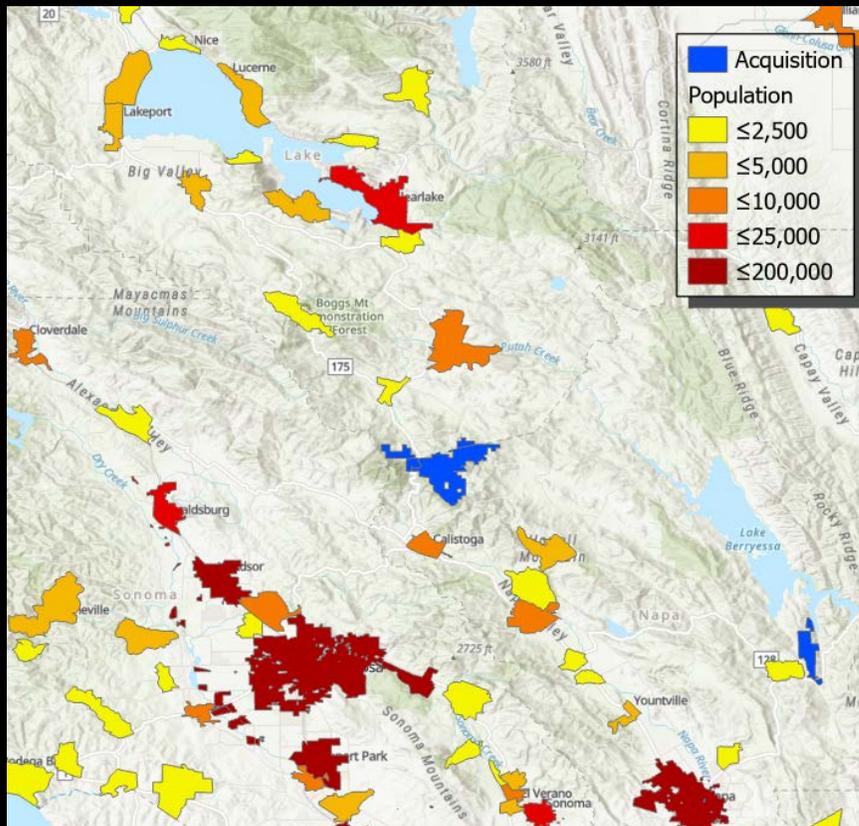
Class	Sponsor	Amount
Non-Profit	Moore Foundation	\$5,000,000
	Private Donation	\$300,000
	Knobloch Family Foundation	\$250,000
	Land Value Donation	\$165,000
	Trust for Public Land	\$56,500
State-Other	WCB	\$3,750,000
	SCC	\$1,700,000
	EEMP	\$500,000
<b>Grand Total</b>		<b>\$11,721,500</b>

combine high resolution imagery and high resolution topography data

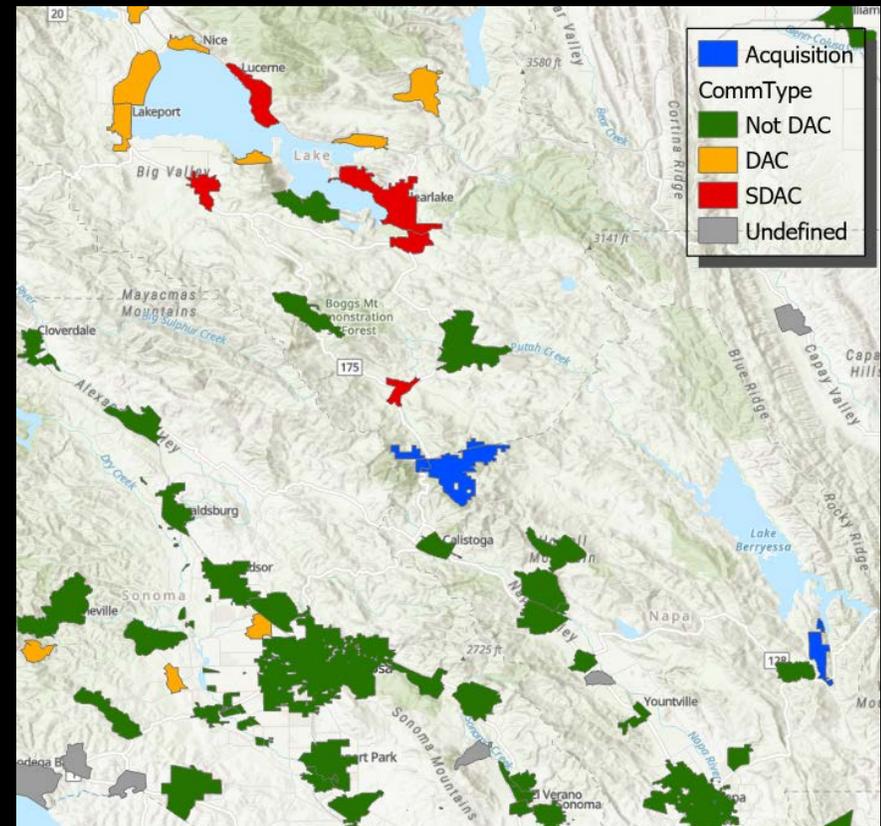


# Demonstration of how to bring in key demographic information

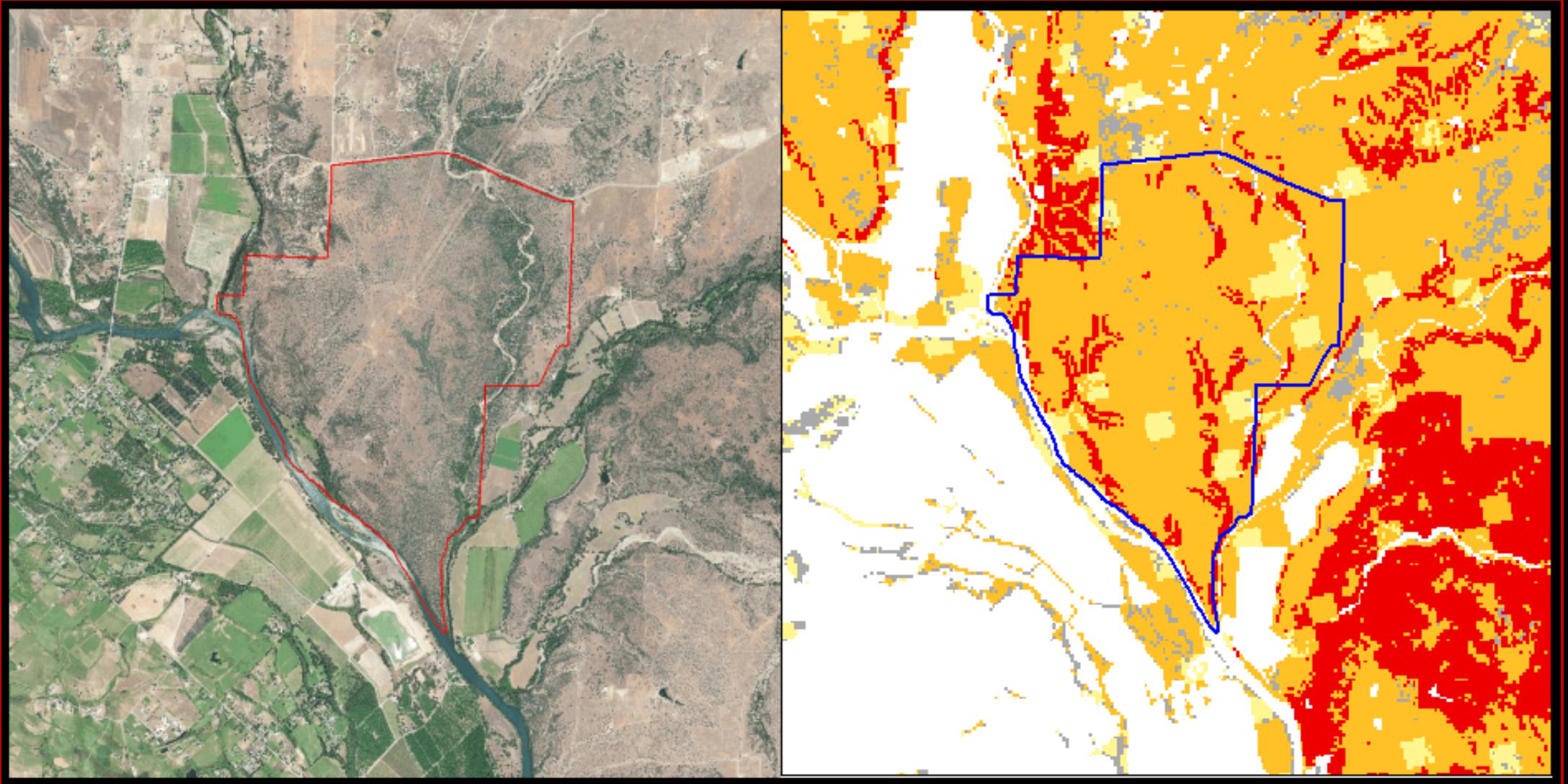
## Population Density



## Economic Status



Structure  Automation



# Q & A

Feel free to ask questions about any of the previous presentations.

If we are not able to address your question during the meeting, feel free to email [MSU@resources.ca.gov](mailto:MSU@resources.ca.gov)



# Current Efforts in Project Performance Monitoring and Evaluation



Feather River Land Trust presentation  
start page



# OUR MISSION

To conserve the lands and waters of the Feather River region and steward their ecological, cultural, and educational values for current and future generations.



Feather River  
Watershed



FEATHER  
RIVER  
LAND TRUST

Upper Feather River watershed,  
above Oroville Dam

0 50 100 Miles



# What is a Conservation Easement?



**WHAT** is a  
Conservation  
Easement?

A **voluntary legal agreement** between a landowner and a land trust or government agency that **permanently limits uses of the land in order to protect its conservation values**. Landowners retain many of their rights, including the right to own and use the land, sell it and pass it on to their heirs.

# Why Monitor Conservation Easements?

## Required by the Land Trust Alliance

- Land trust monitors its conservation easements at least annually.
- The organization documents its annual monitoring activities in writing for each conservation easement.

## Required by IRS

- Land trust must have a commitment to protect the conservation purpose and must have the resources to enforce the restrictions in the conservation easement
- **Honor the commitment!**

**WHY?**  
Conservation  
Easement  
Monitoring





# How do we monitor Conservation Easements?

The foundational cornerstones of monitoring...

## HOW? Conservation Easement Monitoring

**Conservation Easement-** defines values to be protected & prohibited/permitted land use

**Baseline Documentation Report-** establishes current conditions at time of closing

**Land or resource management plans-** specific plans for or resource use e.g. grazing or timber

## Procedures

### 1. Document Review

- CE, BDR, past Monitoring Reports, LMPs

### 2. Due Diligence

- Landowner Interviews
- County Recorder & Building Department verifications

### 3. Monitoring

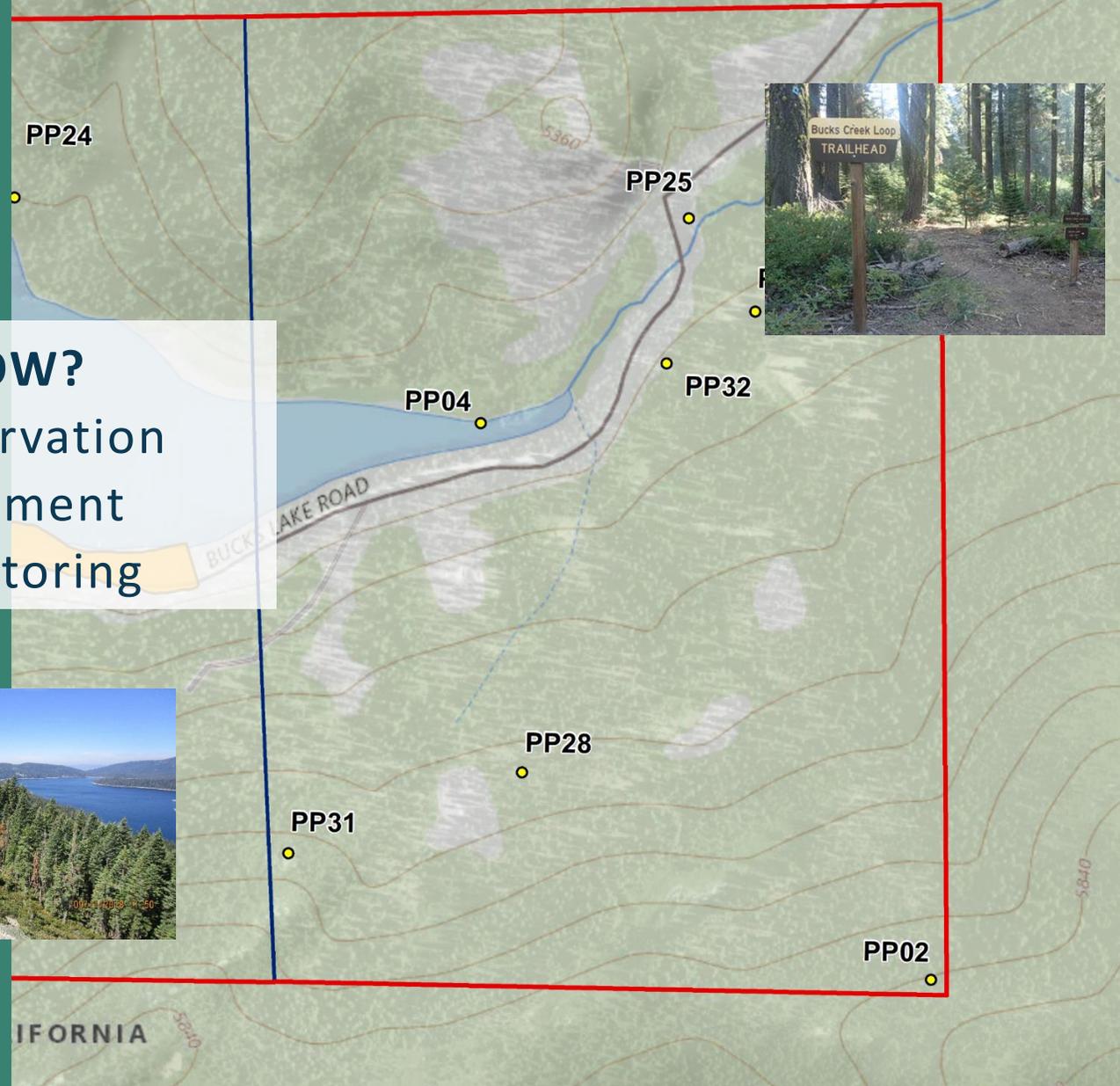
- Desktop reconnaissance
- Site inspections

### 4. Reporting

- Acknowledgement
- Submittal & Recordkeeping

# What are the procedures for monitoring?

**HOW?**  
Conservation  
Easement  
Monitoring



# Violations

## Enforcement

- Remediation through non-litigation actions e.g. site reclamation, on-site mitigation
- Litigation, as a last resort (funded by TerraFirma, legal fees recoup terms in CE)

## Amendment

- In rare cases a CE may be amended if deemed appropriate after extensive review and so long as the resulting agreement does not fundamentally diminish the conservation values protected

# FRLT Policies & Procedures and Fee Patrol Form



## CONSERVATION EASEMENT MONITORING PROGRAM

ANNUAL WORK PLAN, POLICY & PROCEDURES

2020

### Draft Standard Operating Procedure

Title: Fee-Lands Patrol, Annual Monitoring & Logs		Dept: Stewardship__
Date: 6/18/2020	Prepared by: S. Douthit	Feather River Land Trust
Page: 1 of 2		Approved by: Pending

1. Fee-Lands Patrol Logs are to be completed when any staff patrol FRLT Fee-Lands using the template form attached (Attachment A).
2. Patrol Logs can be completed in the field or prepared after each visit.
3. Patrol Logs are due at the end of each month via email as a scanned PDF.
4. Email completed Patrol Logs to the Operations and Land Protection Associate with a CC to the Land Stewardship Director.
5. The Operations and Land Protection Associate will print all Logs and file them in the Fee-Lands Stewardship file stored in the fire-safe file cabinet
6. The Operations and Land Protection Associate will store electronic copies of the Logs according to the Record Keeping Policy and Procedure.
7. The Land Stewardship Director will review all Logs monthly and perform any follow-up as needed.
8. A Fee-Lands Inspection Checklist shall be prepared for each FRLT fee property and be used by staff as a guide for performing regular patrols and routine maintenance.
9. Follow the Incident Response Procedure to document emergency or other unplanned events that involve FRLT properties.
10. Annually, no later than the end of the first quarter of each calendar year, Regional Managers prepare a Fee-Lands Monitoring Report following the template attachment (Attachment B).
11. Fee-Lands Monitoring Reports will be presented to the Stewardship Committee at a regularly scheduled meeting for review and discussion, annually. The Stewardship Committee will forward the Report to the Board of Directors for presentation once the Chair of the Stewardship Committee deems the Report is complete.
12. Fee-Lands Monitoring Reports will be provided to funders and easement holders annually.

Feather River Land Trust end of  
presentation



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Poll Question: What is the largest watershed in California?

# Watersheds & Working Lands

You should see a poll pop-up in your zoom screen shortly- thanks for participating!



# STEWARDED WORKING FOREST CONSERVATION EASEMENTS

*CALIFORNIA NATURAL RESOURCE AGENCY*

*Monitoring and Stewardship Workshop*

July 15, 2020

Connie Best



**PACIFIC FOREST TRUST**

Private Forests. Public Treasures.

# Our Mission

Since 1993, the Pacific Forest Trust has worked in partnership with private landowners, communities and government agencies to sustain forests for their many public benefits of wood, water, wildlife and people's well-being.



**PACIFIC FOREST TRUST**

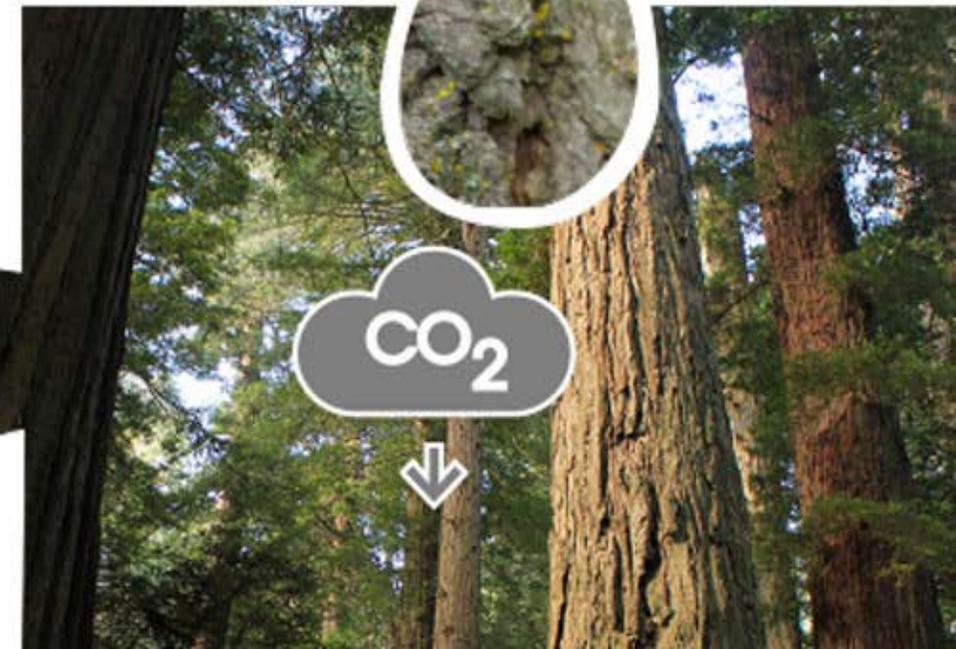
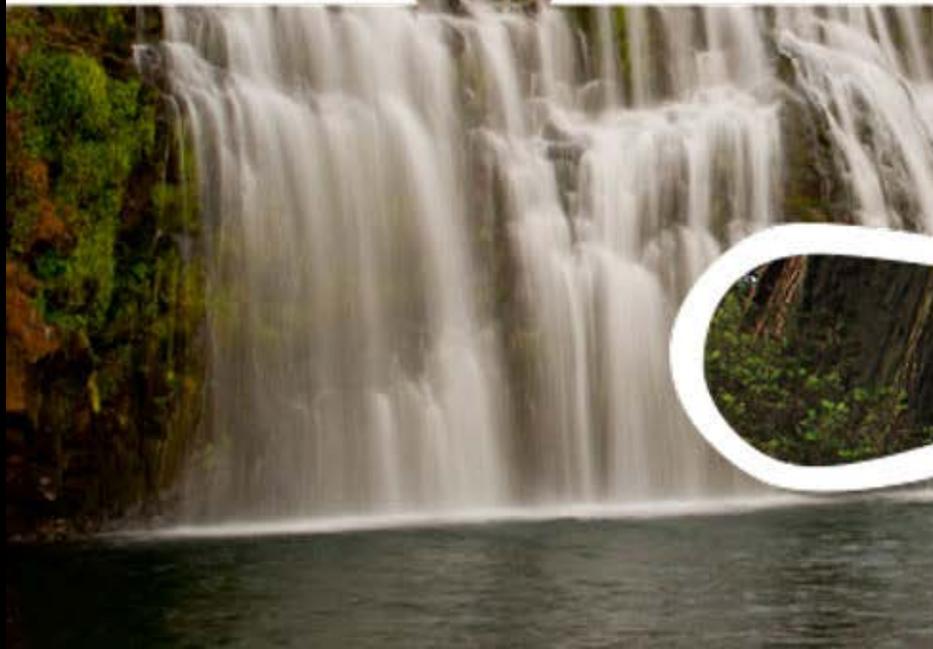
Private Forests. Public Treasures.

# Our on-the-ground conservation work is with private forest owners and agencies in the Pacific West

- PFT pioneered the use of “**working forest conservation easements**”
- 33 conservation easements over 107,000 acres
  - + Redwoods, Mt. Shasta, Sierra, Oregon
  - Families, commercial enterprises, investors
- Own and/or manage 12,000 acres (OR + CA)



A well crafted  
working  
forest  
conservation  
easement can  
help put the  
puzzle  
together for  
landowners  
and the  
public



Conservation Easements are goal driven documents and the partners first and foremost need to agree on what the Conservation Values to be protected are and what the CE Purpose is

## Typical WFCE Restrictions

Every WFCE is unique and site-specific

- Limit or prohibit subdivision & building development
- Establish BMPs for road building & maintenance
- Limit timber harvest and other uses to meet identified conservation goals
- Identify rare or sensitive habitats to be managed solely for species needs
- Requires management plan detailing operations



Conservation easements have evolved over the last 100 years from creating community green space, to protecting ag land to creating forever wild preserves.



PACIFIC FOREST TRUST

Private Forests. Public Treasures.

Each property has a monitoring plan, based on each Conservation Easement restriction. There are a small number of restricted uses that require grantee approval.

## Monitoring WFCE Compliance

### The “Forever” part

- Restrictions/exercise of reserved rights.
- Annual meeting with landowners
- Site visits yearly or more often for timber harvest
- Data driven and geo-referenced
- Management and other plan review, approvals



PACIFIC FOREST TRUST

Private Forests. Public Treasures.

Unlike selling a property to a land trust or government agency, a Conservation Easement really is a public-private partnership in stewarding the property through time.

## Easement monitoring is cooperative

### Constant engagement makes it work

- We emphasize regular communication as the vaccine to prevent disputes
- Review of plans and permitting helps prevent disputes on the ground
- Remedies include liquidated damages e.g. timber theft
- State participation and back stop for enforcement



*It is a true partnership.*



PACIFIC FOREST TRUST

Private Forests. Public Treasures.

This is  
the  
Forever  
Part.

## What data can CNRA track?

- Location, acres protected
- Ownership, changes in Grantor and Grantee
- Resources conserved: habitats, watersheds, other georeferenced attributes in tables and GIS
- Public access: yes/no. Location.
- GHG benefits if quantifiable
- Monitoring frequency and agency attendance
- Compliance: yes/no. If no, details.
- Access to CE, baseline, monitoring plans and reports, public access or other plans
- Amendments



Unlike selling a property to a land trust or government agency, a Conservation Easement really is a public-private partnership in stewarding the property through time-part two.



## Immense public benefits from acquisitions

Stewardship and monitoring can tell the story of the ongoing success of the State's many conservation partnerships



PACIFIC FOREST TRUST

Private Forests. Public Treasures.

Thank  
You!

Thank  
You!



PACIFIC FOREST TRUST

Private Forests. Public Treasures.

Poll Question: Have you ever cut down a tree

**Have you ever...**

You should see a poll pop-up in  
your zoom screen shortly- thanks  
for participating!



# Questions

If we are not able to address your question during the meeting, feel free to email [MSU@resources.ca.gov](mailto:MSU@resources.ca.gov)



Stretch Break

See you in 5  
minutes!



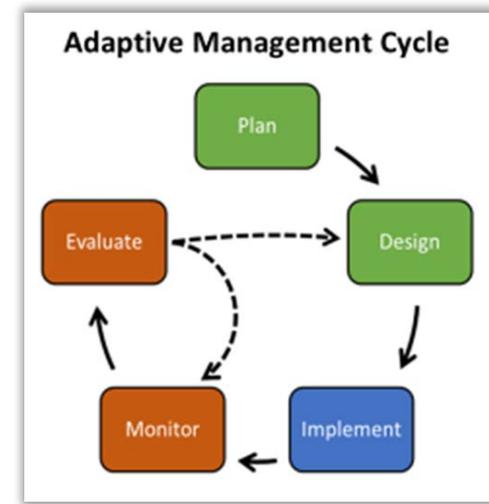
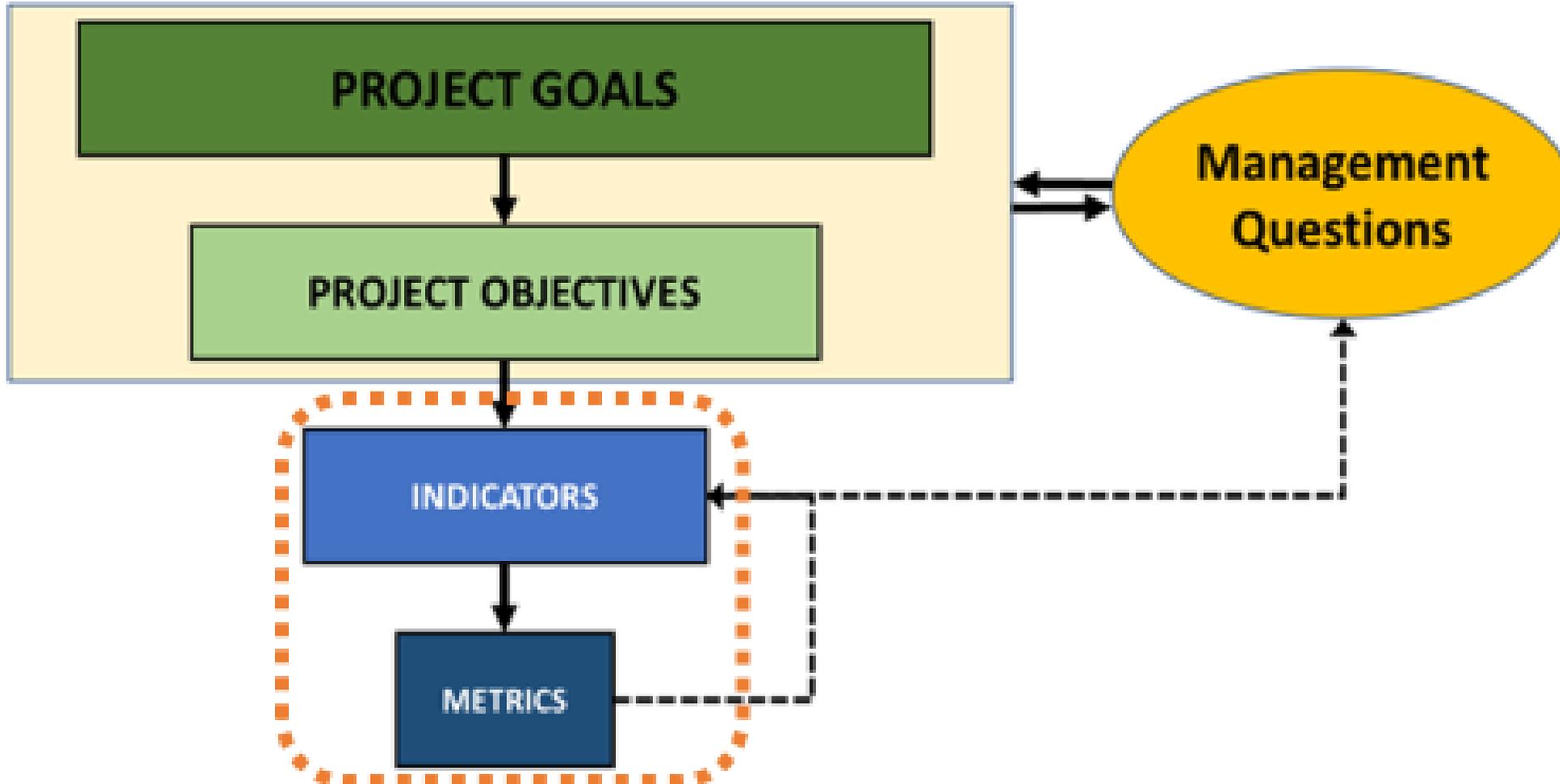
# Project Performance Guiding Principles and Screening Criteria

Elea Becker Lowe

Environmental Scientist, MSU



# PROCESS



# SMART-R CRITERIA

SPECIFIC

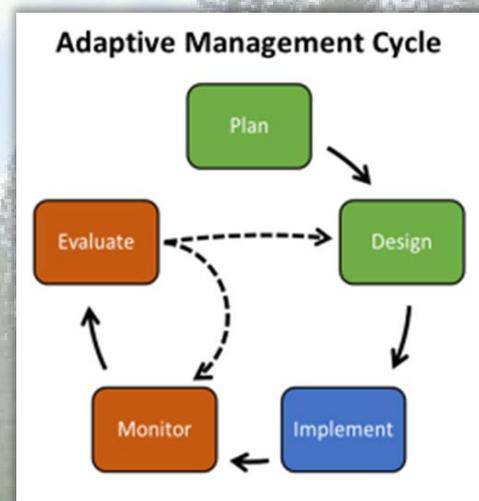
MEASURABLE

ACHIEVABLE

REPRESENTATIVE

TIME-BOUND/TIME-SPECIFIC

RAPTR READY



# Additional Criteria Considered

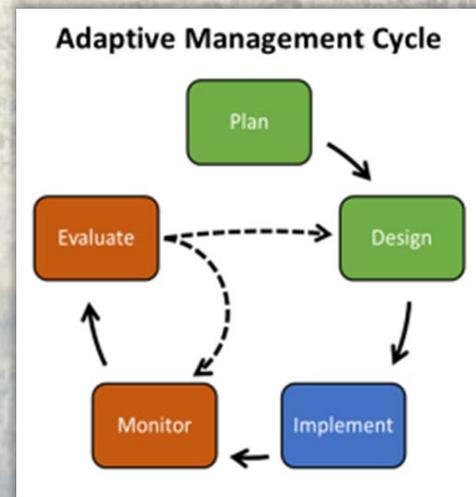
**Cost-effectiveness**

**Machine Readability**

**Labor Capacity (staff time)**

**Access to Applicable Technology**

**Availability of Technical Expertise**



Orit Kalman, Senior Facilitator- CSUS

# Breakout Instructions: Leveraging and Evaluating Indicators and Metrics



# Breakout Discussion Process

Three breakouts focusing on the three management questions:

## **Benefits (Multi-benefits):**

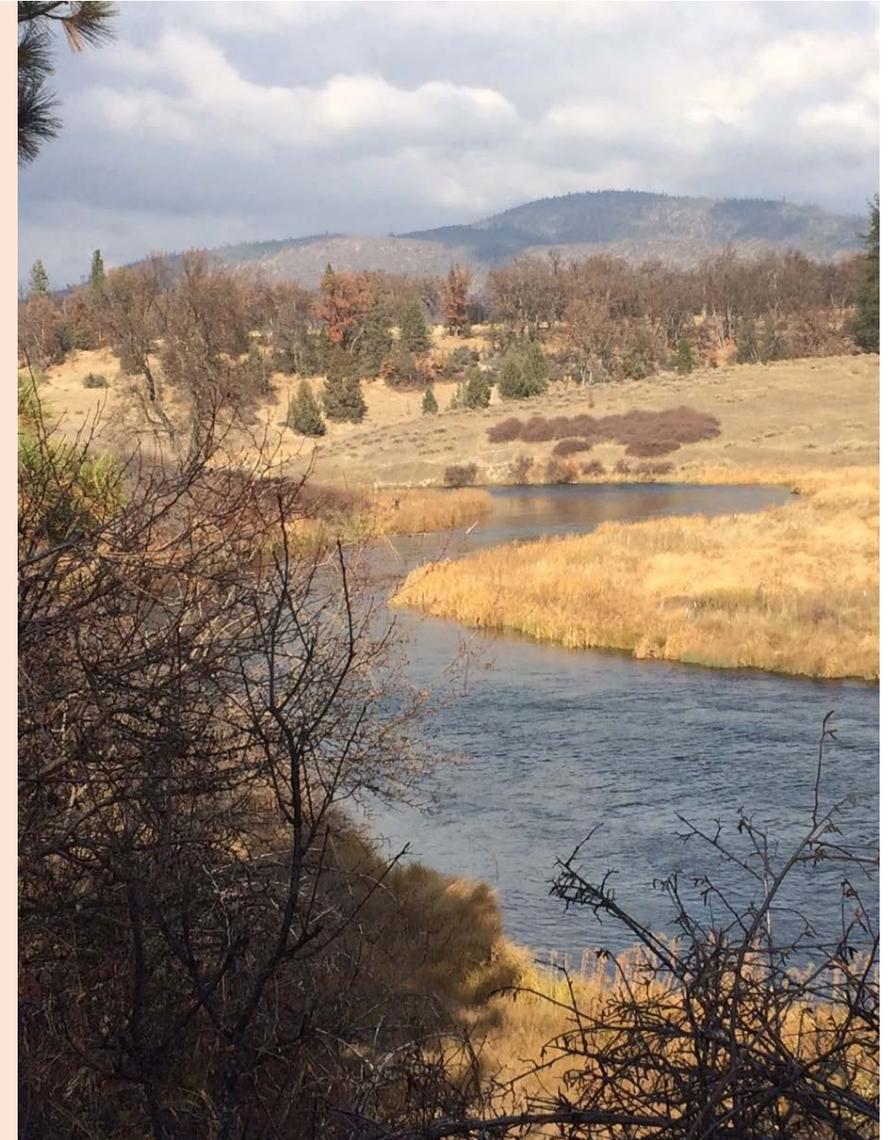
Are there climate benefits to the property acquisition/easement?

## **Land Management/Compliance:**

What are the permitted (legally allowable) uses of the land?

## **Access:**

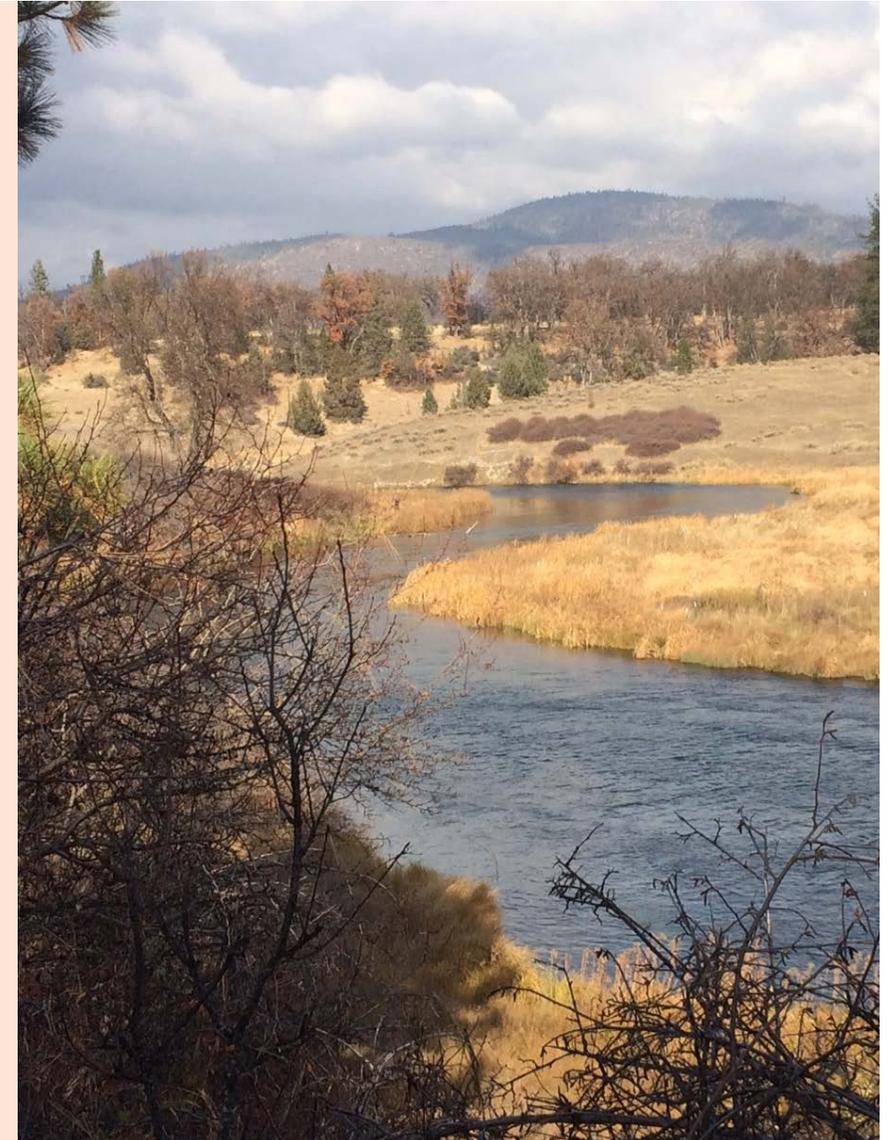
If acquired for public access, does the public still have access?



## Breakout Discussion Process part 2

Questions to be addressed during the three sessions:

1. What are potential indicators/metrics that can be used to help address the questions?
2. Where can this information be found? Documents, tools, etc.
3. What can we learn from an initial SMART analysis about the appropriateness of incorporating these indicators/metrics into the RAPTR system?
4. Which indicators/metrics show the most promise in responding to the management questions and included in the RAPTR system?



**MANAGEMENT QUESTION 1 (MULTI-BENEFITS): ARE THERE (& CAN WE QUANTIFY) CLIMATE BENEFITS ASSOCIATED WITH THE PROPERTY ACQUISITION/EASEMENT?**

EXAMPLE: Indicator 1 – change in carbon on the property (carbon sequestration)

Metric	Information Sources/Not Yet Collected	Specific	Measurable	Achievable	Representative	Time-bound	RAPTR Ready	Notes	Recommendations YES (Go with it) MAYBE (Do more research) NO (Not for RAPTR)
Acres of Land Type	Surveys, reports, etc...	X	X	X	X	X	X	Multiple sources of information	Yes
Land Use	LiDAR	X	X	X	X	?	X	Time – LiDAR surveys are not occurring on a set schedule, and do not cover the full state each time. Depends on cost and contract	Maybe

# Breakout Discussion Template

# Breakout Discussion Mechanics

**Host.** Each breakout room has an MSU Staff who will be tracking the discussion on a template specific to each question.

**Introductions.** Please take few moments to introduce yourselves.

**Three rounds.** You will be assigned to a group that will rotate together from one question to the next in three rounds of breakouts.

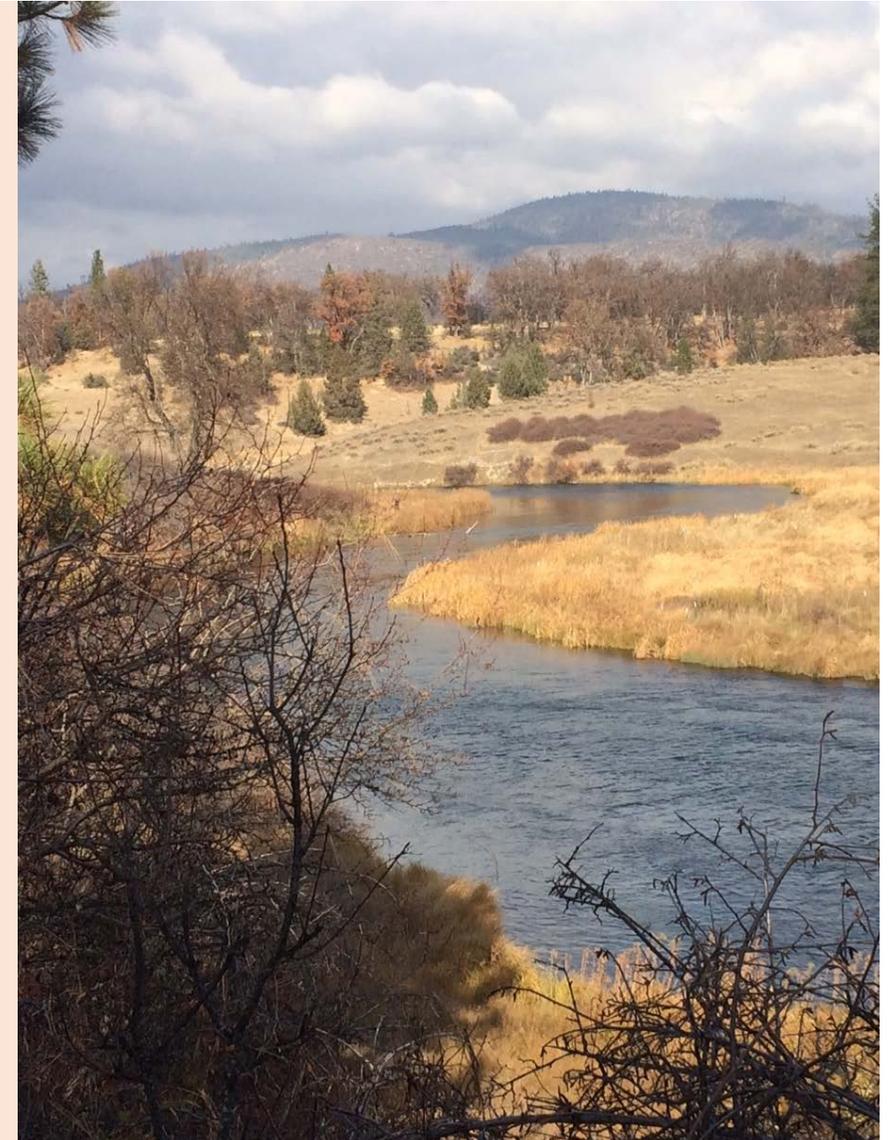
Round 1: 45 minutes (initial work)

Round 2: 35 minutes (add on)

Round 3: 25 minutes (add on)

**Reporter.** Before starting the last round, please identify a participant who is willing to report out on behalf of the group on key themes that you discussed. You will have 3-5 minutes to report out. Please be concise!

**Report out.** At the end of the third breakout session, you will be directed back to the full meeting to share your thoughts.





# Breakout Session #1



Lunchtime

Please join us  
back at 1pm





# Breakout Session #2



# Stretch Break 2

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See you in 5  
minutes!





# Breakout Session #3



# Stretch Break 3

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See you in 5  
minutes!





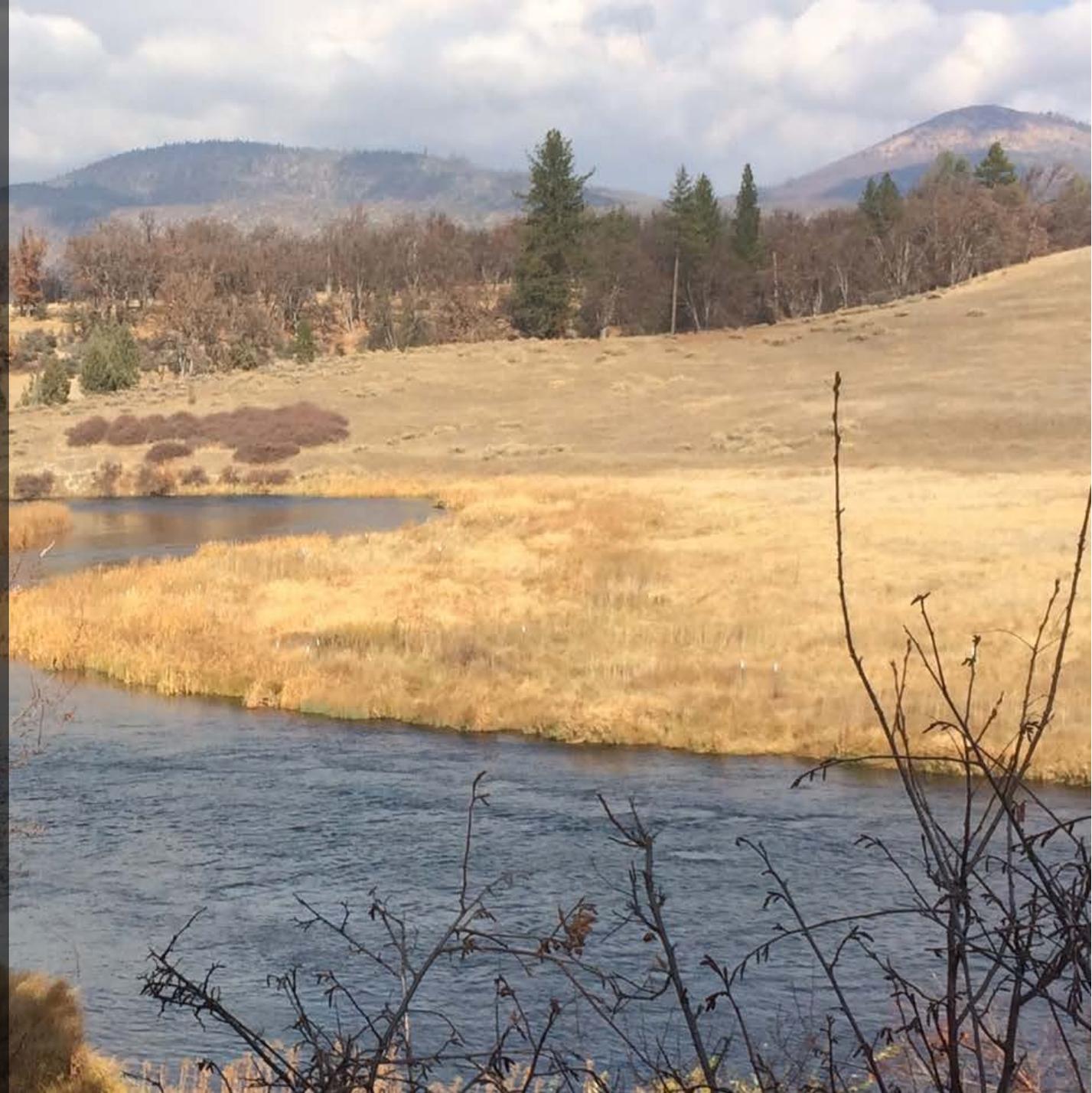
# Report Out and Plenary Discussion





# Report Out

- **Report Out:** What are the most promising metrics to start with (RATPR Ready)?
- **Plenary Discussion:** What is not feasible at this time but should be prioritized for future evolution of RAPTR?



Poll Question: What's the second largest river in California

## **Utility of RAPTR in your work**

You should see a poll pop-up in your zoom screen shortly- thanks for participating!



# Wrap Up and Next Steps

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Gina Ford, MSU



# Workshop Series Timeline

**April 2020:  
Kick-off  
Meeting**

**September 3, 2020:  
Workshop 2**

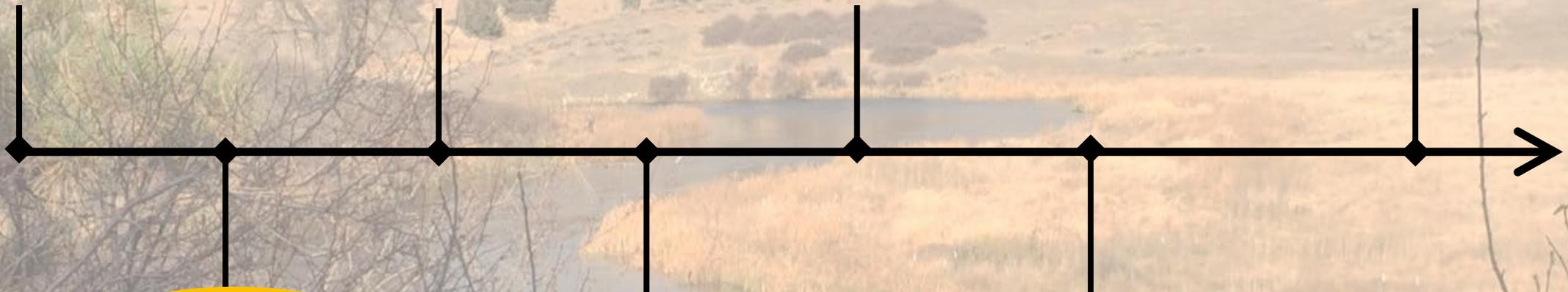
**Early 2021:  
Workshop 4**

**Summer 2021:  
Wrap-up Meeting**

**July 15, 2020:  
Workshop 1**

**Late 2020:  
Workshop 3**

**Spring 2021:  
Workshop 5**



Poll Question

# Feedback on Meeting

You should see a poll pop-up in  
your zoom screen shortly-  
thanks for participating!





# Thank you for joining us today!

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- Please feel free to contact us at:
- [MSU@resources.ca.gov](mailto:MSU@resources.ca.gov)
- Or visit our webpage for more information:
- <https://resources.ca.gov/Initiatives/Monitoring-and-Stewardship-Unit>