

Islands Trust Fund

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## TRUST FUND BOARD COVENANT MONITORING REPORT FORM

### Who are the Islands Trust & the Trust Fund Board?

The Islands Trust, a unique federation of island governments with a provincial mandate to make land use decisions that will “preserve and protect” British Columbia’s Gulf Islands. The Islands Trust Fund is both a branch of the Islands Trust and a conservation land trust. It acquires both land and funds to assist in upholding the “preserve and protect” mandate. To ensure that its standards of protection are being upheld, the Trust Fund Board requires that all properties covenanted or owned by the Trust Fund Board be monitored annually.

### Monitoring Background

The Trust Fund Board Monitoring Program is intended to:

1. **Document landowner compliance with the terms of a conservation covenant.**  
Monitoring for covenants is determined by the covenant itself, including its Baseline Report. Annual monitoring keeps landowners and covenant holders in regular communication and ensures that both parties are satisfying the requirements of the covenant.
2. **Act as an aid in the responsible management of properties that the Trust Fund Board owns.**  
Monitoring is determined by the property’s Management Plan.

Landowners of properties that are covenanted through the Natural Area Protection Tax Exemption Program (NAPTEP) can hire Trust Fund Board approved environmental professionals to complete annual monitoring reports.

### Monitoring of Natural Area Protection Tax Exemption Program Covenants

The Natural Area Protection Tax Exemption Program (NAPTEP) allows the Islands Trust to issue ‘Tax Exemption Certificates’ to property owners who voluntarily give permanent legal protection, through conservation covenants, to eligible natural and cultural areas on their properties.

(See: [www.islandstrustfund.bc.ca](http://www.islandstrustfund.bc.ca) for information)

Under section 8.9 of the NAPTEP Standard Protection Covenant, the landowner of the covenanted property must provide the Trust Fund Board with an annual, written monitoring report prepared between April 1 and June 30 and submitted by July 31<sup>st</sup>.

To conduct the official monitoring of the covenant, the owner may choose to hire:

- a) the Islands Trust Fund, or
- b) a third party monitor.

## Monitoring Procedures

### Planning:

- Read the covenant (including Baseline Report) and any previous Monitoring Reports (provided by the Islands Trust Fund) prior to visiting the covenant area. Be aware of the values being protected and the restrictions on the use of the land.
- Schedule visit well in advance, as stated in the covenant. Contact should be made with the landowner and the co-covenant holder 2 weeks prior to any planned visit.
- Ensure you have all necessary equipment, including: field manuals, GPS equipment (if available), camera, extra film/memory, measuring equipment, compass, covenant, past monitoring reports and extra maps.

### Site Visit & Monitoring Report:

- Walk the property's boundaries, note the route taken on a sketched map taken from the Baseline Report Map. Look for evidence of encroachment, unauthorized access or impacts from surrounding land uses.
- Take pictures and note them on page 6 of this monitoring form and on a sketched map taken from the Baseline Report or Management Plan.
- If the property has public access, document any safety issues.
- Document any covenant infractions. **N.B.** Monitoring for Islands Trust Fund covenants is usually done to ensure compliance with the terms of the covenant. It is **NOT** done, except informally, to monitor for ecological change.
- Note any significant changes, in particular those listed in on page 7 of the monitoring form.
- Make recommendations regarding follow-up with landowners or neighbours, restoration, etc.

### Dealing with Problems/Infractions:

- Infractions should be noted in the monitoring report.
- It is **NOT** the duty or responsibility of the monitor to communicate any infractions with the landowner during the site visit.

<b>Monitor Information</b>	
Name of Monitor(s):	Address:
Company Name (if applicable):	Phone #:
Qualification:	Fax #:
Are you an Islands Trust Fund authorized monitor? Y/N	Email:
<p>If not, or if you are unsure, please contact our office at 250-405-5186 or email us at <a href="mailto:information@islandstrust.bc.ca">information@islandstrust.bc.ca</a> for information on required qualifications.</p> <p>N.B. Doing a monitoring workshop with the Islands Trust does not necessarily qualify you as a monitor.</p>	<p>I, _____, do hereby acknowledge that the information contained in this monitoring report is truthful and has been prepared to the best of my ability.</p> <p style="text-align: center;">_____</p> <p style="text-align: center;">Signature of Monitor</p>

**Recommendations:**

In your professional opinion, are the terms and conditions of this conservation covenant being fulfilled?  
Y/N

Comments:



<b>Site Report</b>	
Date Landowner Contacted (dd/mm/yy): ___/___/___	Date Co-covenant Holder(s) Contacted (dd/mm/yy): ___/___/___
Date Inspected (dd/mm/yy): ___/___/___	Weather:
Was the landowner present during the monitoring visit? Y/N Landowner name:  Were there any landowner comments? Include them below.	
Was the covenant holder present during the monitoring visit? Y/N List their name(s):  Did they have any comments? Include them below.	
Did you encounter any other people on the property during the monitoring visit? Y/N  If yes, describe their activities:	

**Observations**

Is this the first monitoring visit to the covenant area? Y/N

Please note below any observed Red or Blue listed species or plant associations not mentioned in the Baseline Report. Locate them on the Monitoring Report map. Listing new rare/threatened species is especially important if this is the first monitoring report and/or the monitoring is being done at a different time than the Baseline Report. Attach an extra page if needed.

**Instructions:** Using a copy of the Baseline Report map, trace your approximate route and note your photo locations as numbers on the map. The number of photos taken will vary depending on the covenant area and the features it contains. They must establish the route that the monitor has taken and provide comprehensive documentation of any infractions, safety issues or major changes to the covenant area. The monitoring route should include a circuitous walk through the covenant area that captures the significant features detailed in the Baseline Report. Vulnerable areas (including those mentioned in the Baseline Report), such as boundaries, areas with invasive plants, and areas of erosion, should also be examined. Please see sample map below.

Attach your route map (see attached example) as Appendix I to this report.

**Photopoint Descriptions**

**Instructions:** Make notes for each photo location on the sheet provided. If you find a covenant infraction or a safety concern, take several photos and be sure to provide an accurate description of the location of and the direction in which the photo was taken. Similarly, if the property has been protected to conserve specific natural features and those features are being degraded through natural processes, the monitor should document the location and the nature of the observed change. For example, if a Garry oak meadow is beginning to infill with Douglas-fir, the change should be documented through notes, photos and by identifying the location on a map.

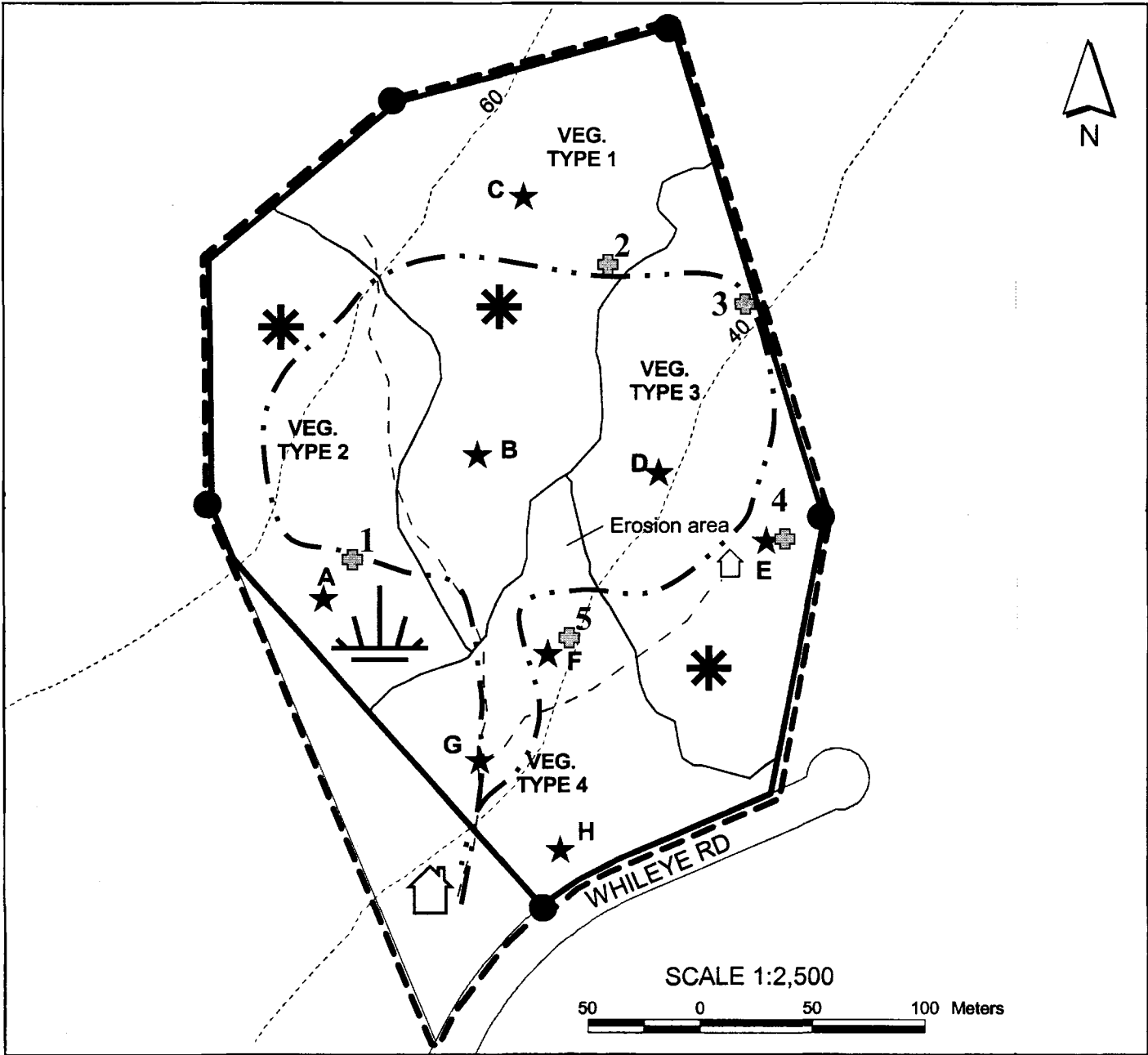
All photos must have a date/time, location, photographer name & reference letter written on the back. If digital photos are used, please provide prints as well as a disk/CD. If necessary attach additional pages for photopoint descriptions.

Attach photos as Appendix II to this report.

Photo number	Comment

Please attach any other information that you feel is pertinent to the monitoring report. **If this is the first monitoring report, be sure to include any observed blue or red listed species or plant associations that were not mentioned in the Baseline Report or Management Plan.**

Appendix I (Example): Monitoring Route for the Covenant Area  
 Lot 2, Section 77, Jade Island, Green District, April 1, 2007



Legend

- |  |  |  |                               |  |                     |
|--|--|--|-------------------------------|--|---------------------|
|  | Contours (20 m. interval)              |  | Red/Blue listed species       |  | Located survey pins |
|  | Trail                                  |  | Invasive species (>20% cover) |  | Photo locations     |
|  | Property boundary                      |  | Sheep shed                    |  |                     |
|  | Heavy black line denotes covenant area |  | House                         |  |                     |
- Monitoring Route

Monitoring Route Photopoints



## Appendix II (Example): Photographic Documentation of Monitoring Route

Photo number	Comment
1	Photopoint located 63 m 120° of the westernmost located survey pin and 100 m 320° of the fork in the trail. Photo was taken facing 135°. Broom patch appears to have increased in size from time of baseline report. Recommend broom removal and replanting with native vegetation to control invasive species.
2	Photopoint is located 125 m 130° of northernwestern located survey pin and 100 m 190° of northernmost survey pin. Photo was taken facing 0°. <b>New red listed species:</b> Hairy manzanita ( <i>Arctostaphylos Columbiana</i> ). Young species threatened by deer browsing, recommend fencing until it is more established.
3	Photopoint is located 100 m 340° of easternmost located survey pin, along the property line. Photo was taken facing 45°. Neighbour is logging to property line. This may result in blowdown in covenant area and some disturbance of wildlife. Recommend monitoring property line carefully on next monitoring visit.
4	40 m 45° of the northeastern corner of the sheep shed and 1 m 235° from the easternmost property pin. Photo was taken facing 50°. This is a photo of the easternmost property pin to establish presence on the covenant property on April 1, 2007.
5	56 m 35° of the fork in the trail. Photo was taken facing 0°. Erosion area is naturalizing. Several invasive grasses are colonizing the area and small broom plants are sprouting. Recommend planting native plants that may shade out invasive species.