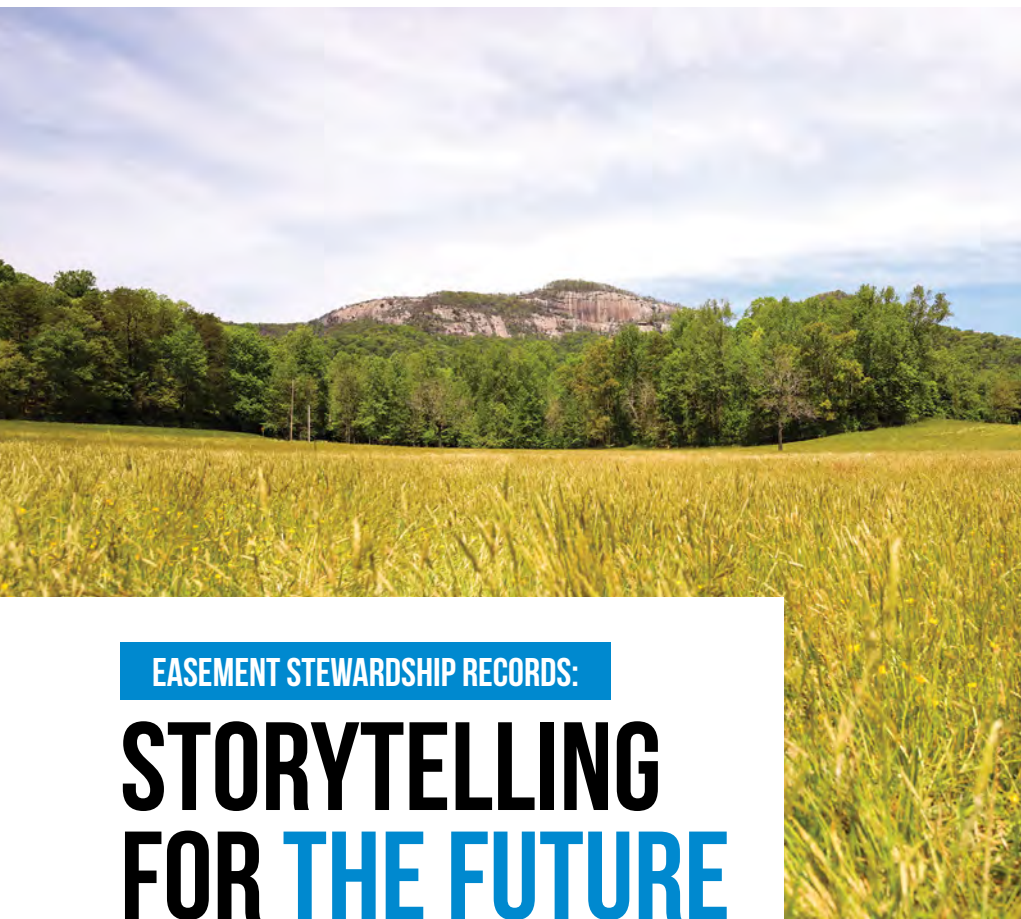




← Upstate Forever's permanent protection of Grant Meadow in Pickens, South Carolina, ensures this idyllic view will remain unspoiled.

EASEMENT STEWARDSHIP RECORDS:

STORYTELLING FOR THE FUTURE

UPSTATE FOREVER

By **KIRSTEN FERGUSON**

Stewardship recordkeeping can be a painstaking process of tracking activities on conservation easements, including landowner requests, approvals and exercised rights. But good recordkeeping can also be a form of storytelling, says Lauren Ulich, director of stewardship and land management at the accredited Upstate Forever in Greenville, South Carolina.

"Good recordkeeping shows what happened on a property at a glance," says Ulich. "So that in the future, say 30 years from now, a future stewardship person doesn't have to dig through a million documents to figure out what happened on a particular property."

It's also truth-telling.

"You can't document too much. It's just not possible," Ulich says. "Whenever we have an important conversation with a landowner, we create a note to file. The most important thing about stewardship is that if there is an activity on a property, there needs to be one source of truth for how that issue or rights request arose, how we dealt with it and why we made that decision."

FROM BINDERS TO 'ONE SOURCE OF TRUTH'

The world of land trust stewardship and recordkeeping has changed a great deal in recent years. When Upstate Forever was founded in 1998, stewardship monitoring was handled by staff from different departments, with records stored largely on paper.

"Historically, for stewardship recordkeeping, we had a stewardship binder for each property," Ulich says. "Every year, we would print out copies of our monitoring reports, important correspondence ... all of the things were in these binders."

When she joined Upstate Forever nearly five years ago, Ulich took one look at the

shelves and realized those binders might eventually fill the entire office. That prompted a shift to an electronic archive that replicates the completeness of the binders without the space constraints.

Today, Upstate Forever's stewardship records follow a clear duplication strategy that lines up with Practice 9G—critical information is stored in at least three places. "All of the important information is in electronic form in the cloud. It's also printed out and sent to off-site storage. Then we have an electronic archive, too, that has limited access," she explains.

Landscape, the land conservation software Upstate Forever adopted in 2020, is a fourth layer. The web-based platform brings together mapping, task lists, monitoring routes, photo points, structures, issue histories and landowner contact information for each stewardship site.

"Historically, that information existed in disparate Word documents and Excel spreadsheets," Ulich says. "Landscape helped us combine it all into one place. Stewardship staff are easily able to see who the landowner is, their contact information, and any monitoring challenges or issues."

The team has also embedded the Land Trust Alliance's easement violation decision tree as a custom form within the system. When an issue is identified, staff walk through the decision tree in Landscape to evaluate severity and determine how to respond.

A RIGHTS SUMMARY FOR EVERY EASEMENT

Another key tool for Upstate Forever is its rights summary document. For every conservation easement, the stewardship team creates an Excel spreadsheet that distills the major rights and restrictions into clear language.

"We try to cut out legalese while still keeping the important elements of what each clause allows or restricts. It's descriptive without being overwhelming," says Ulich.

Each section of the easement gets its own row with columns describing what, if anything, has happened under that provision and when. If a landowner submitted a forest management plan in 2015 and

Upstate Forever approved it that year, that activity and date are recorded beside the relevant clause.

The summary is created soon after closing, “within a month or so,” Ulich says. New landowners receive it along with their welcome letter. The document is then updated and resent annually with the monitoring report.

For stewardship staff, the summary offers a fast way to understand the history of a property and focus monitoring on high-impact areas or past problem spots. For landowners—especially successors who did not negotiate the original easement—it provides a practical guide. It also helps keep the landowner relationship healthy so that problems surface early.

“We’re in the business of compliance and also relationship building,” Ulich says.

To increase touchpoints beyond the annual visit, Upstate Forever sends a short email or letter about six months after monitoring: a friendly check-in plus a one-page PDF of “things to let us know about,” such as harvesting timber or building a structure.

“We’ve found that when we send that email or that letter, landowners say, ‘Oh, yeah, actually, I was thinking about building a tractor barn here,’ and it starts that conversation where otherwise we may not have been top of mind,” she says.

DESIGNING FOR YOUR FUTURE SELF AND FOR ACCREDITATION

Some of the most powerful changes to Upstate Forever’s recordkeeping came after its most recent renewal of accreditation.

“There are predictable questions they ask stewardship staff, about any violations and how you dealt with them, who was involved, and why you made those decisions,” she says. “That used to take a long time because the information was in different places.”

In response, the team built those questions into their own process. Now, when a violation or rights request is resolved, staff complete a short internal report that captures the critical facts and the reasoning behind the decision—structured around the questions they know the Land Trust Accreditation Commission will eventually ask.

It’s another way of being kind to her future self—and to whomever holds the role after her. As easements age and histories grow more complex, that consolidated story becomes essential. In the end, those notes to file, rights summaries and carefully duplicated archives tell the story of how a land trust keeps its promises—and how someone 30 years from now can understand the work and keep it going. ☺

LAND TRUST ACCREDITATION COMMISSION

An independent program of the Land Trust Alliance

landtrustaccreditation.org

ACCREDITATION ACHIEVEMENTS

Congratulations to the nearly 40 land trusts that recently achieved first-time accreditation or renewal of accreditation for either the first, second or third times. Accreditation involves a rigorous evaluation that ensures applicants are operating at the highest conservation standards. Thank you for continuing to lead the way in conservation excellence!

First-time accreditation:

- Heartlands Conservancy (IL)
- Madison-Morgan Conservancy (GA)
- Siskiyou Land Trust (CA)
- Westmoreland Land Trust (PA)
- Woodlands Conservancy (LA)
- Working Lands Trust (NC)

Renewal of accreditation:

- 7 Lakes Alliance (ME)
- Androscoggin Land Trust (ME) ♦
- Blue Mountain Land Trust (WA) ♦
- Boothbay Region Land Trust (ME) ♦
- Buzzards Bay Coalition (MA) ♦
- Cape Elizabeth Land Trust (ME) ♦
- Coastal Rivers Conservation Trust (ME) ♦
- Dartmouth Natural Resources Trust (MA) ♦
- Dutchess Land Conservancy (NY) *
- Feather River Land Trust (CA) ♦
- Great Peninsula Conservancy (WA) ♦
- Great Rivers Land Trust (IL)
- Groton Conservation Trust (MA) ♦
- Hill Country Conservancy (TX) ♦

- Hunterdon Land Trust (NJ) ♦
- Lake George Land Conservancy (NY) ♦
- Lancaster Farmland Trust (PA) *
- Leelanau Conservancy (MI) *
- Lemhi Regional Land Trust (ID) ♦
- Middlebury Land Trust (CT)
- New Mexico Land Conservancy (NM) ♦
- Northern Neck Land Conservancy (VA) ♦
- Northwest Arkansas Land Trust (AR) ♦
- Open Space Institute and its affiliate, Open Space Institute Land Trust (NY) *
- Orange County Land Trust (NY) ♦
- Santa Fe Conservation Trust (NM) ♦
- Sharon Land Trust (CT) ♦
- Sierra Foothill Conservancy (CA) ♦
- Southeast Alaska Land Trust (AK) ♦
- St. Simons Land Trust (GA) ♦
- Tejon Ranch Conservancy (CA) ♦
- The Conservation Fund and its affiliate, Sustainable Conservation (VA) ♦
- Warren Land Trust (CT) ♦

♦ Denotes second renewal

* Denotes third renewal