

CR Monitoring Checklist

In the items below, the original documentation file contains all original copies of all pertinent documents, i.e., the original copy of the CR, of the Baseline Documentation Report, of all subsequent monitoring reports, and of notes on any other actions. The Field Notebook contains the Baseline Documentation abstract, copies of subsequent monitoring reports, and copies of notes on any other actions affecting the monitoring of the property. The Baseline Documentation Report is a complete description of the property and its condition at the time of registering of the CR in the Barnstable County Registry of Deeds.

Prior to Visit:

1. Staff should confirm that landowner has not changed.
2. Staff should notify Monitor that inspection is due and set up possible dates and times for visit. Let Monitor know if this is a photo year (every 5th year unless there is a reason to do it more frequently). Staff should contact the Landowner.
 - A. The T3C Administrator should write the Landowner a letter 2 weeks ahead of date of visit giving 3 choices of date and time and inviting him/her to accompany the monitor. Give the Landowner the option of requesting another date if those three are not convenient. Put copy in Field Notebook.
 - B. Staff should confirm date and time of visit with Landowner and Monitor.
 - C. Staff should call Landowner the day before visit as a reminder. File note in Field Notebook.
3. Monitor should obtain the Field Notebook and review the Baseline Documentation abstract and past monitoring reports and photographs
4. Monitor should gather materials:
 - A. Survey, plans, or maps including map of standard photo locations
 - B. T3C Monitoring Form *
 - C. Clipboard and writing implements
 - D. Digital camera, batteries (in case of violation or vegetation changes)
 - E. Compass and, possibly, 100' measuring tape
 - F. Colored plastic flagging tape (use to flag key positions on boundary)
 - G. GPS
 - H. Plastic sleeves for important documents if wet conditions are expected

During the Visit:

1. Monitor should check in with the Landowner
2. Monitor should walk areas of greatest concern
 - A. Boundaries with abutters
 - B. Interior trails/roads
 - C. Buildings included in the restricted portion of the property
 - D. Boundaries of excluded areas or building envelopes
 - E. Other easily accessed areas
3. Monitor should document the visit photographically.
 - A. Photograph any potential violations and any changes in the property
 - B. Photograph at standard locations at five year intervals.

4. Monitor should flag critical points on boundaries with flagging tape if they are not clear.

After the Visit:

1. Monitor should complete the monitoring report describing any CR discrepancies without calling them violations. Staff should input to the digital monitoring form if not submitted digitally. Staff should convert the completed digital form to a pdf document for permanent filing.
2. Monitor should document and label photographs with dates and locations and any special features shown.
3. Monitor should create a photo log including position, direction the camera was facing, brief description of what the photo shows.
4. Staff should file paper material as appropriate, one copy in the original documentation file and one copy in Field Notebook. Staff should add digital versions of all documentation to CD.
5. Staff should follow up with Landowner. Send Landowner a copy of the report. Discuss report with the Landowner by phone if he/she was not present during visit and if there is anything which might not be clear.

*Go to the Sample Documents section of this online library to see the Conservation Restriction Monitoring Form

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