



SONOMA COUNTY OPEN SPACE FISCAL OVERSIGHT COMMISSION
COMMISSIONERS

Mike Sangiacomo (First District)
Todd Mendoza (Second District)
Gary Wysocky (Third District)

Ariel Kelley (Fourth District)
Jorge Inocencio (Fifth District)
Jeff Owen (Alternate)

REGULAR MEETING AGENDA

Virtual Meeting Due to Sonoma County's Shelter in Place Order
October 6, 2022 | 5:00 p.m.

In accordance with AB 361, Governor Newsom's March 4, 2020 State of Emergency due to the COVID-19 pandemic, Sonoma County Public Health Officer's Recommendation for Teleconferenced Meetings, and the Sonoma County Board of Supervisors Resolution 21-0399, the October 6, 2022 Fiscal Oversight Commission meeting will be held virtually.

MEMBERS OF THE PUBLIC MAY NOT ATTEND THIS MEETING IN PERSON

*UPDATE REGARDING VIEWING AND PUBLIC PARTICIPATION IN
OCTOBER 6, 2022 FISCAL OVERSIGHT COMMISSION MEETING*

The October 6, 2022 Fiscal Oversight Commission Meeting will be facilitated virtually through Zoom. Members of the public can watch or listen to the meeting using one of the three following methods:

1. Join the Zoom webinar on your computer, tablet or smartphone by clicking <https://sonomacounty.zoom.us/j/94827319733?pwd=S3Jja1JneVE0ZHhMbHliZTZsMVB3QT09> password: cows707
2. If you have a Zoom account, click Join Meeting by number: 948 2731 9733 password: cows707
3. Call-in and listen to the meeting: Dial (669) 900-9128 Enter meeting ID: 948 2731 9733

Public Comment During the Meeting: You may email public comment to Sara.Ortiz@sonoma-county.org. All emailed public comments will be forwarded to all Commissioners and read aloud for the benefit of the public. Please include your name and the relevant agenda item number to which your comment refers. In addition, if you have joined as a member of the public through the Zoom app or by calling in, there will be specific points throughout the meeting during which live public comment may be made via Zoom and phone.

Disability Accommodation: If you have a disability which requires an accommodation or an alternative format to assist you in observing and commenting on this meeting, please contact Sara Ortiz by phone at (707)565-7346 or by email to Sara.Ortiz@sonoma-county.org. by 12 p.m. Wednesday, October 5, 2022 to ensure arrangements for accommodation.

END OF UPDATE

1. **Call to Order**
 2. **Agenda Items to be Held or Taken Out of Order; Off- Agenda Items**
 3. **General Announcements Not Requiring Deliberation or Decision**
 4. **Public Comment**
The Brown Act requires that time be set aside for public comment on items not agendized.
 5. **Correspondence/Communications**
 6. **General Manager's Report**
Misti Arias | General Manager
 7. **Approval of Commission Minutes Attachment 1**
 8. **Financial Report**
Sheri Emerson | Stewardship Manager **Attachment 2**
 9. **New Monitoring Tools and Technology: Remote Monitoring Using Lens Attachment 3**
Jacob Newell | Stewardship Supervisor
Taylor Acosta | Stewardship Technician
 10. **Projects in Negotiation Attachment 4**
 11. **Suggested Next Meeting**
October 20, 2022
 12. **Adjournment**
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AGENDAS AND MATERIALS: Agendas and most supporting materials are available on the District's website at sonomaopenspace.org. Due to legal, copyright, privacy or policy considerations, not all materials are posted online. Materials that are not posted will be made available for public inspection between 8:00 a.m. and 5:00 p.m., Monday through Friday, at 747 Mendocino Avenue, Santa Rosa, CA after Sonoma County health officials lift the Shelter in Place order.

SUPPLEMENTAL MATERIALS: Materials related to an item on this agenda submitted to the Commission/Committee after distribution of the agenda packet will be posted on the District's website and made available for public inspection at the District office at 747 Mendocino Avenue, Santa Rosa, CA during normal business hours after Sonoma County health officials lift the Shelter in Place order. You may also email Mariah.Robson@sonoma-county.org for materials.



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UNAPPROVED MINUTES

Virtual Meeting Due to Sonoma County's Shelter in Place Order

August 4, 2022 | 5:00 pm

COMMISSIONERS PRESENT: Ariel Kelley, Jorge Inocencio, Jeff Owen, Todd Mendoza

STAFF PRESENT: Misti Arias, General Manager; Luke Bowman, County Counsel; Julie Mefferd, Administrative and Fiscal Services Manager; Jennifer Kuszmar, Acquisition Manager; Mary Chambers, Agricultural Specialist; Sara Ortiz, Administrative Aide; Ceara McKetchnie-Stanley, Administrative Aide.

PUBLIC PRESENT:

1. Call to Order

Commissioner Kelley called the meeting to order at 5:04 p.m.

2. Agenda Items to be Held or Taken Out of Order; Off- Agenda Items

3. General Announcements Not Requiring Deliberation or Decision

4. Public Comment

5. Correspondence/Communications

6. General Manager's Report

Misti Arias reported on the Sonoma Development Center – the State of California has put out an RFP looking for planning that will be aligned with the County plan. The State has said that the open space area will not be developed, so it is likely that the area will get transferred to Regional or State Parks. Ag + Open Space is involved in talks; if the State transfers land with no cost there may not be a role for Ag + Open Space.

Vegetation Management – we have entered into 18 new grant agreements, as well as conditionally approved grants, and received reporting from 19 grant agreements that are 50% or more completed. The Board has a subcommittee and Kim Batchelder is heading a technical advisory committee.

Three Board items going 8/30 – Carbon Sequestration Composting Program Funding, AFA Grants, and McClelland Dairy SALC Application Approval

Misti has been in closed session discussions with the Board surrounding Chanslor Ranch and Regional Parks

7. Approval of Commission Minutes

On a motion by Commissioner Owen and a second by Commissioner Mendoza, the July 7, 2022, minutes were approved.

8. Election of Officers

Commissioner Mendoza motioned to nominate Commissioner Inocencio for Chair Pro Tempore, Commissioner Owen 2nd. Motion carried unanimously.

9. Discussion of Hybrid Meetings

Julie Mefferd opened a discussion of hybrid meetings and explained the technology in place to allow for virtual and physical meetings. Hybrid meetings will begin in Fall 2022.

10. Farmland for All Presentation

Mary Chambers presented and answered questions on the Farmland for All program.

11. Projects in Negotiation

Jennifer Kuszmar shared the monthly projects in negotiation list.

12. Suggested Next Meeting

September 1, 2022

13. Adjournment

The meeting was adjourned at 6:23 p.m.

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Sonoma County Agricultural Preservation and Open Space District
Consolidated Balance Sheet - District and OSSTA Funds
August 31, 2022

Assets

Cash and Investments	\$86,351,769
Accounts Receivable	672,274
Other Current Assets	1,125
Intergovernmental Receivables	313,615

Total Assets	<u><u>\$87,338,783</u></u>
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Liabilities and Fund Balance

Current Payables	\$162,911
Other Current Liabilities	9,993
Due to Other Governments	562,902
Deferred Revenue	0
Long-Term Liabilities	0

Total Liabilities	<u><u>735,806</u></u>
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Fund Balance

Nonspendable - Prepaid Expenditures	1,125
Restricted - District Activities	86,591,853
Total Fund Balance	86,592,978

Total Liabilities and Fund Balance	<u><u>\$87,338,783</u></u>
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Cash by Fund

OSSTA - Measure F	\$73,462,300
Open Space District	2,135,085
Stewardship Reserve*	0
Cooley Reserve	157,314
Operations and Maintenance	13,578,126

Total Cash by Fund	<u><u>\$89,332,826</u></u>
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*On July 1, 2015 the County of Sonoma Measure F Sales Tax Refunding Bonds, Series 2015 were issued. The transaction provided a savings of \$13.6 million, in part by following the Commission's recommendation of paying down \$30 million in principal, as well as obtaining a lower interest rate. The Commission recommended using the \$10 million in the Stewardship Reserve Fund as part of the \$30 million paydown. Additionally, the Commission directed use of the \$7.5 million annual savings resulting from the shortened term to fund the Stewardship Reserve beginning in the fiscal year 2024-2025. FOC Minute Order #13 dated May 14, 2015 reflects this direction.

Sonoma County Agricultural Preservation and Open Space District
 Consolidated District and OSSTA Budget to Actual
 For the one month ended August 31, 2022
 16.6% of Year Complete

	Budget Final	Actual Year to Date	Encumbrances Year to Date	Remaining Balance	% of Budget Remaining
Revenues					
Tax Revenue *	\$31,897,720	\$865,015		\$31,032,705	97.29%
Intergovernmental	5,095,000			5,095,000	100.00%
Use of Money & Prop	145,000			145,000	100.00%
Miscellaneous Revenues	490,300			490,300	
Other Financing Sources	650,988			650,988	100.00%
Total Revenues	38,279,008	865,015		37,413,993	97.74%
Expenditures					
Salaries and Benefits	6,652,471	625,721		6,026,750	90.59%
Services and Supplies	8,752,161	223,186	\$4,973,202	3,555,772	40.63%
Other Charges	2,676,843	7,119	487,900	2,181,825	81.51%
Capital Expenditures**	28,415,000		154,395	28,260,605	99.46%
Other Financing Uses	7,901,663	640,000		7,261,663	91.90%
Total Expenditures	54,398,138	1,496,026	5,615,497	47,286,615	86.93%
Net Earnings (Cost)	(\$16,119,130)	(631,011)	(\$5,615,497)	(\$9,872,622)	
Beginning fund balance		87,223,989			
Ending Fund Balance		86,592,978			

Note: Sales tax collected as of August 31, 2021 was \$1,058,301. Current collections are 18.26% below the prior year. There continue to be collection and timing issues with CDTFA and COVID relief programs.

(California Department of Tax and Fee Administration)

Note: Negative Use of Money and Property relates to the amortization of gains and losses of investments, not the rate of return.

** Capital expenditure breakdown

Paulin Meadow (Parcel J)	\$1,587
	<u><u>\$1,587</u></u>



Remote Easement Monitoring Protocol

March 14, 2022

Introduction

This protocol guides staff efforts to monitor conservation easements remotely with the platform Lens. Ag + Open Space does not seek to replace on-the-ground monitoring but to employ remote monitoring as a complement to our existing monitoring program; i.e. replacing on-the-ground monitoring in certain, limited instances. The purpose and benefits of remote monitoring include the following:

- 1) To potentially determine if an easement property is compliant with the terms of the conservation easement (and other related agreements) when an in-person monitoring visit is not feasible due to a pandemic-related County Health Order, natural disaster, or other circumstance that prevents in-person access to the entirety of the property;
- 2) To potentially increase the efficiency of the monitoring program so that Ag + Open Space can better meet its monitoring policy of monitoring every easement every 12-18 months; and
- 3) To potentially enhance the quality of monitoring, where remote monitoring may detect conditions that on-the-ground monitoring might miss.

On November 30, 2021, we entered into a [two-year contract](#) with Upstream Tech for their remote monitoring platform, Lens. We are conducting a two-year pilot to determine the utility of this tool. Near the end of the contract term, staff will evaluate the effectiveness of Lens in meeting the above purposes and report our findings and recommendations regarding continued use to Management.

This protocol implements our Stewardship Policy, which states: “Ag + Open Space shall endeavor to monitor its conservation easements every 12 to 18 months, or in accordance with industry standards, which may allow for less frequent on-the-ground monitoring with use of aerial photographs or other remote sensing data.”

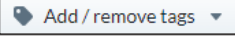

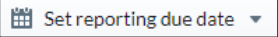
Selecting Properties for Remote Monitoring












Process/Prioritization

The Stewardship Supervisor is responsible for assigning staff to monitor easements and for determining whether a property is suitable for remote monitoring. Monitoring staff will work with the Stewardship Supervisor to select properties for remote monitoring, based on the criteria below. Approximately once per quarter, we will manage monitoring priorities for both remote and on-the-ground monitoring using Tags, Assignee, and Reporting Due Dates on the Property Overview page in Lens. We will also use the Stewardship Database (qryMonitoringPriorities) to track and prioritize monitoring efforts.

Tags, Assignees, and Reporting Due Dates

The Lens Property Overview page features a row for each property and columns for Tags, Assignee, and Reporting Due Date. To set these fields, locate the property and select the adjacent checkbox .

- 1)  We have created custom tags as shown to the right. Each property will always have at least one of these tags. At the end of 2022, we may adjust the years as needed.
- 2)  Stewardship Supervisor will assign High Priority ASAP and other 2022 properties to monitoring staff.
- 3)  Reporting Due Date will default to 15 months after the latest monitoring visit. We will adjust this date based on Mandated Monitoring (grant requirements) or other considerations. When there is a monitoring backlog, we will set Reporting Due Date in a realistic manner using future dates.

Customize Tags	
High Priority ASAP	
2022 Remote Monitor	
2022 Ground-Visit	
Monitoring In Process	
Awaiting Jake Review	
Ready to Finalize	
On Hold	
2022 Completed - Ground	
2022 Completed - Remote	
Mandated Monitoring	
Fee Land	

Criteria: What Makes a Property Suitable for Remote Monitoring?

We will generally apply the following criteria in selecting properties for remote monitoring:

- 1) Property has been monitored on-the-ground in the past 2 years ideally, 4 years maximum. The Land Trust Alliance's Standards and Practices requires on-the-ground monitoring at least once every 5 years. Ag + Open Space seeks to monitor on-the-ground at least once every 3 years.
- 2) Property owner has not changed since latest monitoring visit. If property owner has changed, conduct an on-the-ground visit to observe changes and develop landowner relationship.
- 3) Property is not to staff's knowledge under imminent threat to Conservation Values or easement violation that would require on-the-ground monitoring to properly observe and document.
- 4) Property does not have any pending enforcement cases, permitted use requests, or amendments that would substantially benefit from on-the-ground monitoring.
- 5) Property land use is stable, and staff have a good working relationship with landowner for conducting a reliable telephone interview (see Landowner Questionnaire below).
- 6) Property is not subject to any grant agreements that require on-the-ground monitoring; staff will verify that any granting agencies have reviewed and approved this protocol prior to replacing an on-the-ground monitoring visit with remote monitoring.

Preparing for Remote Monitoring

If there are multiple land ownerships on the property, conduct entire process separately for each unit.

Initiate Project

- 1) In Liquid Planner, create a project using the Remote Monitoring project template, rename with the format "Monitoring - [Property YYYY] REMOTE". Move project to Flexible Deadline package (Fixed if grant-mandated deadline), assign project owner, fill out all custom fields and tag with Supervisor's District. Set deadline for 30 days from when you plan to interview landowner.
- 2) Create a new folder within Property folder for the current year if one has not yet been created. Within the current year folder, create a sub-folder titled "Monitoring – IN PROCESS". Within sub-folder, place a copy of the transmittal letter template, fillable Landowner Questionnaire form, and Front Page Comments template.
- 3) On the Property Overview page in Lens, locate the property and update Tags (i.e. Monitoring in Process) and Reporting Due Date as needed, in consultation with Stewardship Supervisor.

- 4) Check availability of high-quality imagery for the property. Generally, use imagery no older than 3 months. In no case will we use imagery older than 12 months for remote monitoring. If suitable imagery is not available, consult with Stewardship Supervisor about monitoring on-the-ground. Imagery is addressed further in the Observing Property Imagery section below.
- 5) Create a record for the visit in the Stewardship Database (tblMonitoringVisits); enter date you expect to observe imagery in *MonitoringDate* field; enter your standard name (as it appears in Lens) in *MonitoredBy* field. In *tblDistrictHoldings*, enter your standard name in *MtrAssignee* field; enter "Pending" in *MtrStatus* field. Update *MtrStatus* field as report progresses.

Research Property

- 1) Search Liquid Planner for any other active projects for the property by filtering by custom fields for the property name; follow-up with project manager of any active projects (see #6 below).
- 2) Review info sheet, baseline, past monitoring reports, management plan(s), use requests, enforcement actions, and easement amendments, if any.
- 3) Review Conservation Easement and any other agreements such as Recreation Conservation Covenant, Matching Grant Agreement, Transfer Agreement, or third-party grant agreements to ensure familiarity with project structure and key provisions.
- 4) Review Stewardship file and Main file for any other pertinent documents.
- 5) Check County websites for any recently [recorded documents](#) or [permits](#).
- 6) Discuss property with Stewardship Supervisor and any other relevant staff; ask if there are any outstanding issues or concerns to focus on when interviewing landowner or reviewing imagery.
- 7) Based on property research, note any particular issues to address when interviewing landowner and reviewing imagery.

Interviewing Landowner

Using the Messaging Points and Landowner Questionnaire below, interview landowner over the phone (preferred) or by email (take notes using Landowner Questionnaire form, or email form to landowner). This conversation is an important opportunity to cultivate working relationships with our landowners. Be sensitive of their time, but know that this interview will likely save them time, so try to have them devote time to answer each question thoroughly. You may expand upon each question based on the particulars of each property. Note all responses for reference in observing property imagery and/or preparing remote monitoring report. Note any responses that warrant an on-the-ground monitoring visit, and follow-up with Stewardship Supervisor.

Messaging Points

- 1) Ag + Open Space is implementing a remote monitoring program to increase our efficiency – reducing time investment for routine visits so we can better focus staff resources on issues needing attention.
- 2) We are required to monitor our easements regularly to ensure compliance, but it has become increasingly difficult to visit all of our easements every year due to COVID, fires, and an ever-increasing portfolio of protected lands.

- 3) With advancing technology, it is becoming more common for holders of conservation easements to conduct some monitoring visits remotely. We are not replacing on-the-ground visits entirely, but maybe every-other visit will be remote.
- 4) A remote monitoring visit consists of: I) interviewing landowner, asking a series of questions; II) observing aerial or satellite imagery to detect any noteworthy changes on property; and III) preparing a monitoring report to document landowner interview and any observations.
- 5) We are under contract with an imagery service provider that accesses satellite and aerial imagery and hosts them online for our observation. They have a suite of images often updated every few months, so this offers another way for us to monitor our protected lands. This imagery is already being collected, we are not procuring any new imagery.
- 6) Because it is more efficient (no on-the-ground visit), remote monitoring will save taxpayer money (staff time) and landowners time by not needing to meet with us onsite.
- 7) Before we observe the most recent imagery, we have a series of questions for you.
- 8) After this interview, we will observe the imagery, prepare a written report with a map including the latest imagery, and we may note some of your comments in the report, which we will provide you once completed.



Landowner Questionnaire

- 1) Have you or anyone else undertaken any new uses or activities or installed any new structures or improvements on the Property since the latest [YYYY] monitoring visit?
- 2) Do you or anyone else plan to undertake any new uses or activities or install any new structures or improvements on the Property in the next year or two?
- 3) Have you had any instances of trespass or dumping since the latest [YYYY] monitoring visit?
- 4) Do you plan to sell or transfer or lease any portion of the Property in the next year or two?
- 5) Are you dealing with any specific land use challenges at this time?
- 6) Do you have any concerns about the condition of the Conservation Values identified in the Conservation Easement [note specifics]?
- 7) To the best of your knowledge, are you in full compliance with the Conservation Easement?
- 8) Do you have any questions or comments about the Conservation Easement or Ag + Open Space?


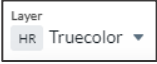
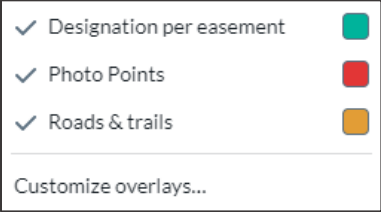
Observing Property Imagery

Select/Purchase Imagery

- 1) On the property's Map View page in Lens, check availability of high-quality imagery for property. Use free imagery if a suitable image is available, otherwise select image for purchase based on the criteria below. For more detail on selecting suitable imagery, see the support article on [Ordering High Resolution Imagery](#).
 - a. Cloud-cover is not obscuring property;
 - b. Leaf-off (October – March) if necessary to observe key property features;
 - c. Temporal resolution: generally, use imagery no older than 3 months; in no case use imagery older than 12 months for remote monitoring;

- d. **Spatial resolution:** generally, use imagery with 0.5-meter resolution; 1.5-meter resolution may be acceptable.
- 2) **Free imagery.** On the property's Map View page, note the default image. Lens automatically loads the most recent National Agriculture Imagery Program (NAIP) image, which is 1-meter resolution, captured every 1-3 years.
 - a. View other available free imagery by selecting the dropdown menu . For more detail on free imagery, see the support article on [Public Imagery and Data Layers](#).
- 3) **Commercial imagery.** On the property's Map View page, view available commercial imagery by clicking the Order Imagery button .
 - a. Preview available imagery, considering the criteria noted above. Select desired image, noting the cost in the Order Imagery Preview pane. For more detail on selecting suitable imagery, see the support article on [Ordering High Resolution Imagery](#).
 - b. Request approval (via email) from Stewardship Supervisor to order image. Include property name, imagery source, spatial resolution, capture date, and cost.
 - c. After obtaining approval, select Order Image in the Order Imagery Preview pane. Lens will email you when the image is available (usually within one hour).

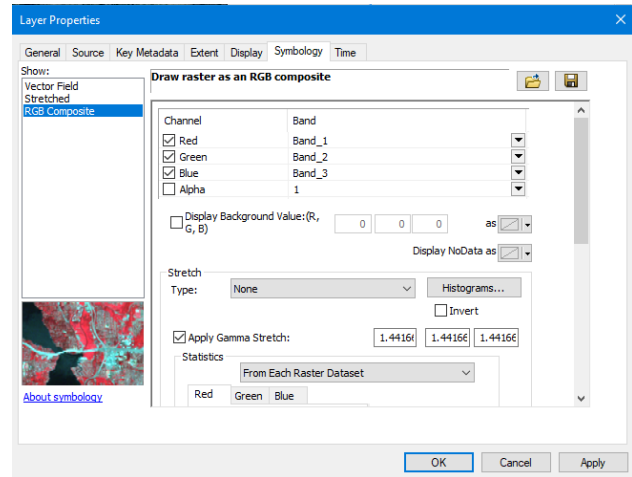
Observe Imagery

- 1) Once you have selected and can view your selected imagery, determine your monitoring route and map scale. Lens automatically adjusts the scale bar at the lower left of the Map View page when scaling in and out. Generally, the scale bar should read 100 or 200 feet for panning the property, zooming into 50 feet or closer as needed.
- 2) Carefully pan the entire property, observing areas of interest including:
 - a. Easement boundary
 - b. Easement designation areas
 - c. Access points
 - d. Structures & improvements
 - e. Roads & trails
 - f. Sensitive areas (Natural Areas, riparian buffers, etc.)
 - g. Areas of concern (past issues, high-use areas)
 - h. Photo point locations of interest
- 3) Occasionally compare the image with an older image by clicking , selecting an older image for comparison, and using the slider. For more detail on comparing images, see the support article on [Seeing Changes with View and Compare Modes](#).
- 4) To view or hide overlays, click the  drop-down and select overlays to display. Adjust the symbology defaults by clicking "Customize overlays" at the bottom of the drop-down. Hovering your mouse over Photo Points will display Photo Location Number; hovering over EDA boundaries will display Designation per Easement (note: this label feature is buggy due to boundaries often serving as boundaries of two EDAs).
 

Obtain Local Copy of Imagery (Optional)




If desired, you can download a non-georeferenced PNG from the details tab on the Map View page or request a georeferenced GeoTIFF from Upstream Tech at no extra cost. See support article on [Exporting Imagery from Lens](#) for more detail. Request a GeoTIFF if you feel there is need to view it in GIS, but at this time, we are not requesting a local copy of georeferenced imagery as standard practice.

- 1) To request a GeoTIFF, email lens@upstream.tech with “Property Name” “Image Date” “GeoTIFF Request” in the subject line.
- 2) Once received, download and save the imagery in S:\GISProjects\[Property_Name_DB]\Data\Imagery\ using the nomenclature: Property_Name_DB_Aerial_Source_YYYYMMDD (Example: Geary_Ranch_Airbus_Pleiades_20211209.tif)
- 3) **To Open in ArcMap:** Import the raster using the “Add Data” drop-down button. To display a proper truecolor image right-click on the raster in the Table of Contents pane, select Properties, select the Symbology tab, and confirm the Stretch Type applied is “None”.




Make Notes

Notes document what staff observe during remote monitoring. Similar to on-the-ground photos, it is helpful to make enough notes to show that we have monitored the property thoroughly. Notes stating “no changes observed” can be just as important as notes documenting an observed change. Make a note for any observed change, and in key locations such as Building Envelopes when there is no observed change.

- 1) To make a note, click the  button and  . For more detail, see the support article on [Making Notes](#).
- 2) Enter a description of the observation in the text box. Be as clear and thorough as possible, yet not too wordy; use similar language as on-the-ground photo descriptions. Describe observation and features documented in imagery and whether there is any change observed, as well as any concern related to conservation values or easement compliance. For reference, see pages 23-24 of [Remote Property Monitoring at The Nature Conservancy in California](#).
- 3) Drop a point or polygon at the feature you are documenting, as well as any attachments (e.g. ground photo). This georeferenced placemark creates a helpful inset map in the Lens report.
- 4) To finish making the note, click  .
- 5) When finished making all notes, discuss observations with Stewardship Supervisor and other relevant staff. Determine whether there are any easement compliance issues or follow-up needs such as a phone call with the landowner; see our [CE Enforcement Guidelines](#).

Preparing Report

Draft & Review Report


- 1) Update record for visit in Stewardship Database (tblMonitoringVisits) with actual date you observed imagery in *MonitoringDate* field.
- 2) Finalize Landowner Questionnaire. If you interviewed the landowner, be very judicious in how you represent what the landowner said. Use specific language in the active voice; for example: “Landowner said this person did/plans to do this action in this location for this reason on this date.” Be careful not to misrepresent any landowner statements.
- 3) Generate draft Lens report by selecting the  button in the Notes pane. Lens automates most report content, including:
 - a. Front Page: “Property_Name_Full”; “Remote Monitoring Report”; “Sonoma County Agricultural Preservation and Open Space District”; and report generation date.
 - b. Property Overview Map: Map showing property boundary and aerial imagery, including the image capture date and source.
 - c. Observation Pages: Page for each observation, with a detail map, Note, and metadata.

Enter Owner_Name_Full in parentheses below property name on front page. Defer making any other edits to Lens report until Stewardship Supervisor reviews (you cannot save edits in Lens reports). Print/save report pdf using standard nomenclature: Property_Name_DB Remote Monitoring Report YYYYMMDD DRAFT.

- 4) Prepare draft “Front Page Comments”, using Word template, saved in monitoring folder:
 - a. Monitored By: [your name]
 - b. Date Imagery Observed: [date]
 - c. Landowner Interviewed/Date: [enter appropriate option from following list:]
 - i. “I spoke with [landowner name] over the phone on [date] and took notes of the conversation; see attached Landowner Questionnaire.”
 - ii. “[landowner name] submitted the attached Landowner Questionnaire by email on [date].”
 - iii. “I was unable to contact the landowner, so I did not complete the Landowner Questionnaire.”
 - iv. [Other nuanced description as appropriate.]
 - d. Comments: [enter “See Observations 1, 2, etc.” Briefly call attention to anything noteworthy from the landowner interview or observations]
- 5) Prepare draft monitoring report transmittal letter, using remote monitoring letter template. Insert salutation from Owner_Name_Correspondence field in tblDistrictHoldings. Customize letter as appropriate, addressing any concerns arising from the interview or imagery, or other noteworthy issues. If you are unsure what to say, simply include a bullet point for the issues you feel we may need to address in the letter. Research and include any pertinent landowner resources regarding land management to include in or attach to the transmittal letter.
- 6) Submit draft report, including transmittal letter, Landowner Questionnaire, Front Page Comments, and Lens report pdf to Stewardship Supervisor for review (email link to project folder). Include property name, “Remote Monitoring Report”, and “Ready for Review” in email subject line. Describe any urgencies or significant points of concern in email.

- 7) Stewardship Supervisor reviews and comments.

Finalize Report

- 1) Incorporate Stewardship Supervisor's comments into transmittal letter, Landowner Questionnaire, Front Page Comments, and Lens report in the Notes pane.
- 2) Generate final Lens report by selecting the  button in the Notes pane.
 - a. Enter Owner_Name_Full in parentheses below property name on front page.
 - b. Insert "Front Page Comments" where it says "Add your text here..."
 - c. Adjust other pages as need (should be minimal), and print/save pdf.
- 3) Compile entire report into a single pdf, including the transmittal letter, Landowner Questionnaire, Lens report, and any attachments. Save in the project folder using standard nomenclature: Property_Name_DB Remote Monitoring Report YYYYMMDD, where YYYYMMDD is the date of transmittal. If there are multiple ownership units on the property, add landowner name to report filename: Property_Name_DB_Owner_Name_DB_Remote_Monitoring_Report_YYYYMMDD.pdf.
- 4) Sign/e-sign the final report pdf next to your name on the front page of the Lens report.
- 5) Send final report pdf to Stewardship Supervisor for signature (on letter).
- 6) In Lens, update Tags as needed (i.e. 2022 Completed), remove your name from Assignee field (unless Stewardship Supervisor assigns you for next visit), and set Reporting Due Date for 15 months from the date you observed imagery (or if Mandated Monitoring, set with appropriate date).

Transmittal & Project Closure

Transmit Report

- 1) Email landowner signed final report pdf, if we have landowner's email address.
- 2) Print hardcopy final full report:
 - a. One copy on archive paper (for main file) – include letter, Landowner Questionnaire, and Lens report, but no need to include other attachments.
 - b. If not emailing report to landowner, one copy on appropriate paper (for landowner).
 - c. One copy on appropriate paper (for monitoring binder) – exclude letter if standard template only, and use judgement regarding whether to include attachments.
- 3) Deliver report (a) to Receptionist for filing, along with report (b) if mailing to landowner.
- 4) Place report (c) in monitoring binder, place binder back on shelf.
- 5) Email signed final report pdf (hyperlink) to all Stewardship staff, copy other staff as needed.

Close Project File

- 1) Implement file management best practices: delete drafts, ensure correct nomenclature, etc.
 - a. Additionally, QA/QC past monitoring report project folders: delete Word documents of past transmittal letters, photo layouts, and photo tables (only if complete report pdf versions exist). Save Word documents only for most recent reports. Ensure filenames follow standard nomenclature noted above.

- 2) Update Info Sheet, print, and place in front pocket of monitoring binder.
- 3) Mark Liquid Planner project DONE. (Mark checklist items & tasks done as you complete them).
 - a. If letter includes any enforcement issues, create new LP Enforcement project and add record to Stp DB tblEnforcement, discuss enforcement strategy, owner, and timeline with Stewardship Supervisor
 - b. If the letter includes a retroactive approval, tag this LP Remote Monitoring Project with #Retroactive_Approval and add record to Stp DB tblEnforcement and tblPermittedUseRequests
- 4) Finalize record for visit in Stewardship Database (tblMonitoringVisits).
 - a. Verify date you observed imagery in *MonitoringDate* field, and enter date of transmittal in *SentDate* field.
 - b. Enter name of person you interviewed in *PersonContacted* field; enter “Remote monitoring – landowner interview.” in *ContactType* field.
 - c. Leave *LandUse* field blank – it is not necessary to track this info here.
 - d. Enter “See Landowner Questionnaire and Lens report” in *ChangesObserved (Observations and Documentation)* field.
- 5) Update tblDistrictHoldings in the Stewardship Database.
 - a. Enter date you observed imagery in *LatestVisit* field; enter date of next monitoring visit (15 months from *LatestVisit* date) in *NextVisit* field; clear *MtrAssignee* field unless otherwise directed by Stewardship Supervisor; change *MtrStatus* field to Pending; update other fields as needed.
- 6) Notify GIS staff of any issues with data overlays in Lens that need to be addressed.

Upstream Tech Lens Administration & Maintenance

Staff Roles

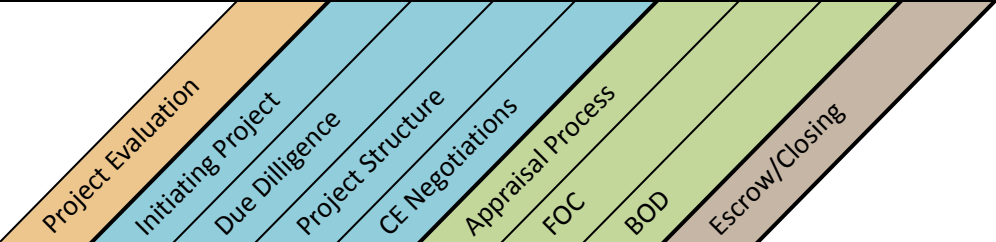
Jake serves as contract lead and approves all imagery orders and reviews all draft monitoring reports. Taylor serves as end-user/technical lead and primary liaison with Upstream Tech. Allison serves as lead technical advisor. Alex and/or Stephanie serve as technical support/advisors and lead in keeping data current (see below). Sheri serves as managerial director and must approve any contract extension or renewal. All Stewardship Technicians serve as primary users for conducting remote monitoring.

Upstream Tech Contacts

Carolyn Dupont (Head of Growth & Partnerships) carolyn@upstream.tech; Eve Boyce (Lens Growth & Partnerships) eve@upstream.tech; Kristi Peyton (Technical Account Manager) kristi@upstream.tech.

Keeping Data Current

Upstream Tech maintains copies of the following layers in Lens: Holdings; Easement-Designation Areas; Roads & Trails; and Photo Points. Approximately every three months, around the end of each quarter, Alex or Stephanie will provide updated data files to Upstream Tech (Kristi), in coordination with Taylor.

Conservation Easement Project Name	Acreage (approx)	Sup. District										Comments
			Step 1	Step 2			Step 3			Step 4		
Abril Ranch	1,929	4										Due Diligence - mineral rights review
Armstrong Redwoods State Natural Reserve - Ayers Addition	320	5										Negotiating CE - Landowner review
Baumert Springs	372	5										Due Dilligence - Awaiting prelim update
Big Sulphur Creek (Krasilsa)	507	4										Initiating Project
Chanslor Ranch	378	5										Initiating project - Letter of Intent to landowner
Correia	146	2										Initiating project
Crawford Gulch	92	5										Project Structure - development
Deniz Ernest & Beverly Trust	217	2										Project Structure - development
Deniz Family Farm	355	2										Project Structure - development
Denner Ranches	489	5										Appraisal phase - seeking appraiser
Diamond W Ranch	849	2										Project Structure - development
El Recreo	289	1										Escrow and Closing
Healdsburg Ridge Open Space Preserve - South Expansion	149	4										Deadline for appraisal proposals - 8/5/2022
Lafranchi (Laguna)	127	5										Negotiating CE - Landowner review
Limping Turkey Ranch	158	2										Initiating project
Mark West Wikiup Preserve	31	4										Appraisal phase - Offer under consideration
McClelland Dairy	348	2										Negotiating CE
McCormick Ranch - Regional Parks	253	1										Appraisal process - boundary issues
Miguel-Tocci	489	5										Initiating project
Preston Farm	133	4										Project Structure phase
Riebli Family Dairy	139	2										Project Structure phase
Rincon Hills	218	1										Project Structure phase - development
Rowland Mack	168	1										Project Structure phase - development
Russian River Habitat Restoration	63	4										Initiating project
Saddle Mountain Open Space Preserve – Lobban Addition	266	1										Project Structure; Fee appraisal reviewed

