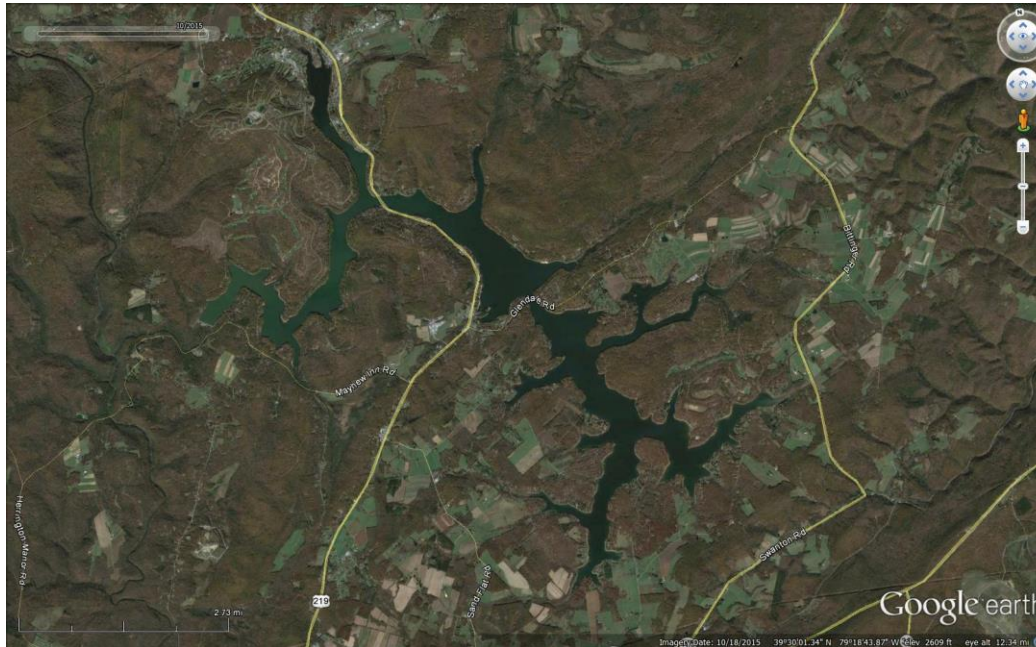




Deep Creek Lake Natural Resource Management Area

Digitized file storage and access

Seth Metheny
Natural Resource Technician
Deep Creek Lake NRMA



Deep Creek Lake (DCL)

- Maryland's largest lake
- 3,900 acres of surface area
- 65 miles of shoreline
- Maryland acquired DCL in 2000
- Maximum depth of 72 feet
- Buffer Strip area ~650 acres



15 File Cabinets



~2,300 Files

Hardware



- Fujitsu ScanSnap iX500
- Western Digital My Cloud EX2
- APC Back-UPS Pro 1000
- iPad
- Desktop Computer



Software



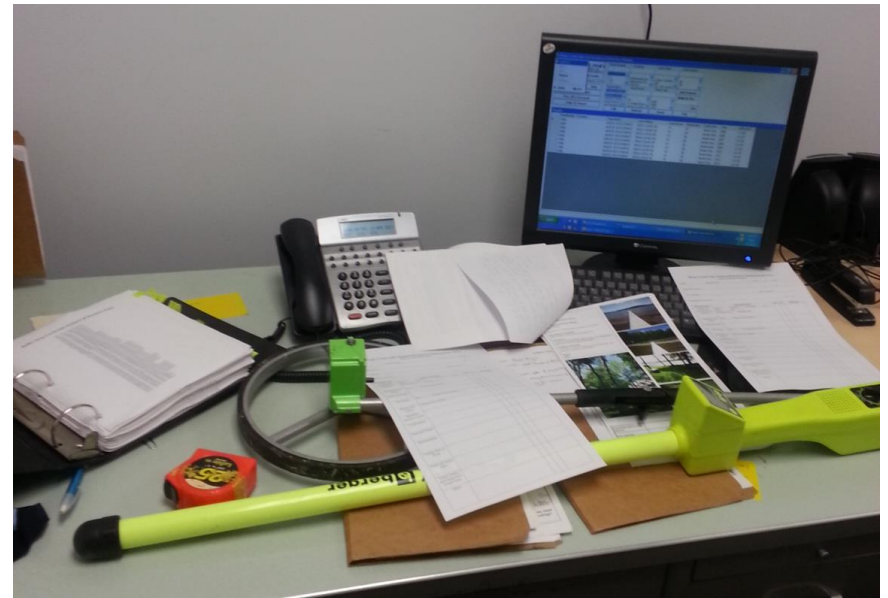
My Cloud™

- FormConnect (iPad)
- My Cloud (iPad & Desktop)
- SnapScan Organizer (Desktop)
- Adobe Acrobat DC (Desktop)

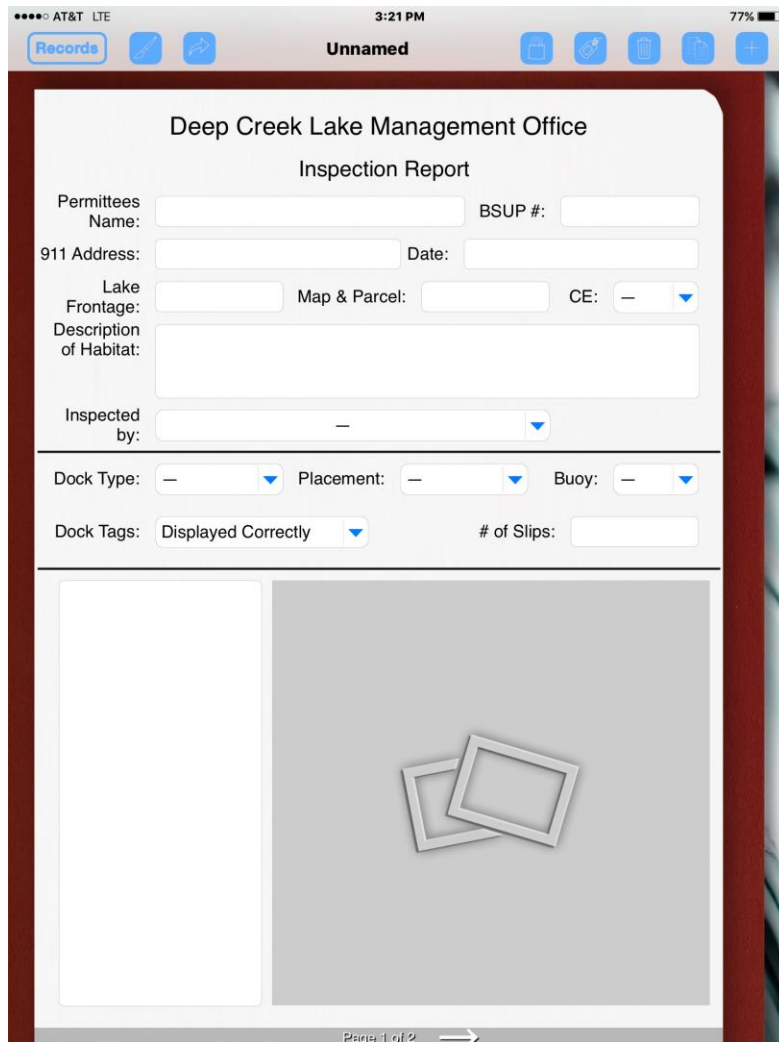


Inspections (Old system)

- Large tub of permit files
 - Digital camera
 - Maps binder
 - Tape measure
- Inspection data sheet
- Total time spent per Inspection (2 hours)

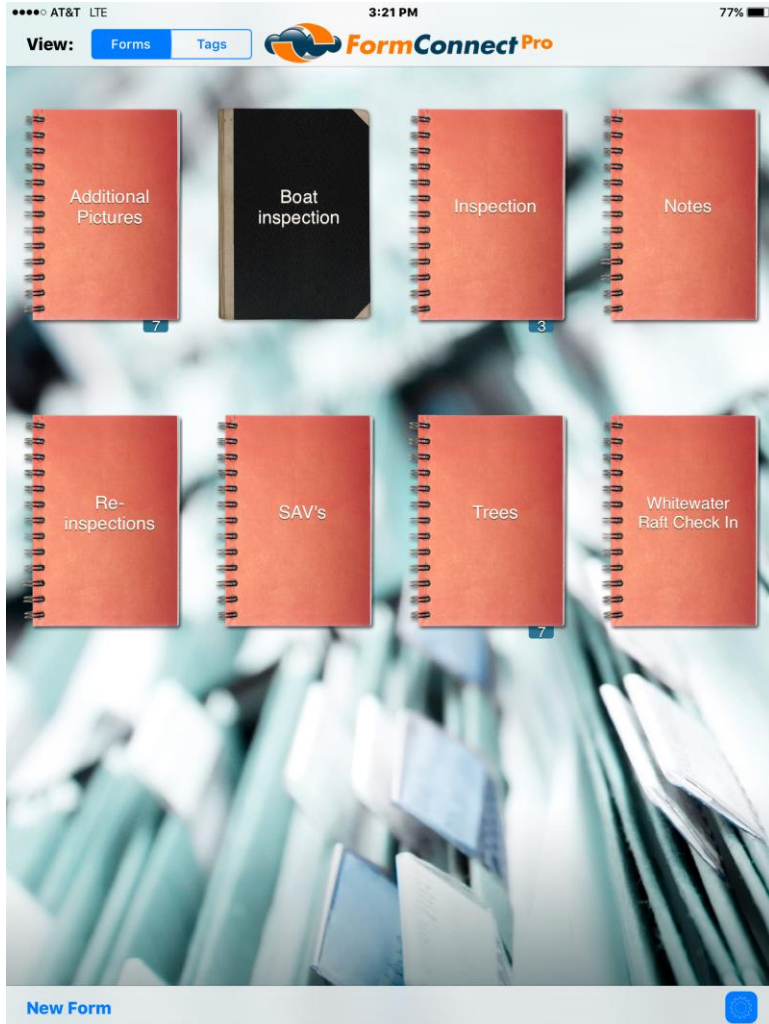


Inspections (New system)



The screenshot shows an iPad app interface for an inspection report form. The status bar at the top indicates AT&T LTE, 3:21 PM, and 77% battery. The app title is "Records" and the document is "Unnamed". The form is titled "Deep Creek Lake Management Office Inspection Report". It contains several input fields and dropdown menus: "Permittees Name:" with a text field and "BSUP #:" with a text field; "911 Address:" with a text field and "Date:" with a text field; "Lake Frontage:" with a text field, "Map & Parcel:" with a text field, and "CE:" with a dropdown menu; "Description of Habitat:" with a large text area; "Inspected by:" with a dropdown menu; "Dock Type:" with a dropdown menu, "Placement:" with a dropdown menu, and "Buoy:" with a dropdown menu; "Dock Tags:" with a dropdown menu set to "Displayed Correctly" and "# of Slips:" with a text field. At the bottom, there is a "Page 1 of 2" indicator with a right arrow.

- iPad
- FormConnect
- Google Earth
- Export to My Cloud
- Total time spent per inspection (30 minutes)



Additional Forms Used With FormConnect

Advantages

- Much less paper
- Many tasks completed in the field
- Easier access of files for us and permit holders
 - Not limited to one physical file

Limitations

- Time to organize and scan
- Data Coverage



Questions?

LOCATE

SALESFORCE APP FOR LAND TRUSTS



DONNA WHITIG
LOCATE Product Manager



PAUL KEOGAN
CEO of BackOffice Thinking



MEET THE FOUNDER AND VISIONARY OF THE LOCATE APP

The Colorado Coalition of Land Trusts (CCLT) is the collective voice for land conservation in Colorado. Our 50 member land trusts and local government open space programs have protected nearly 2 million acres of Colorado's wildlife habitat, working farms and ranches, and significant natural landscapes. The Coalition promotes and supports land conservation excellence through leadership, advocacy, education and outreach.



"IT DOESN'T MATTER HOW MUCH YOU GIVE, WHAT YOU GIVE.. ONLY THAT YOU GIVE."

WANT TO BE PART OF SOMETHING BIG & MEANINGFUL? BE A PART OF #GIVING TUESDAY



BackOffice Thinking

CREATED BY EXPERTS WHO HELP NONPROFITS

BackOffice has particular expertise in helping land conservation, public garden, and other environmentally focused firms with their database, website, analytics, and fundraising needs.

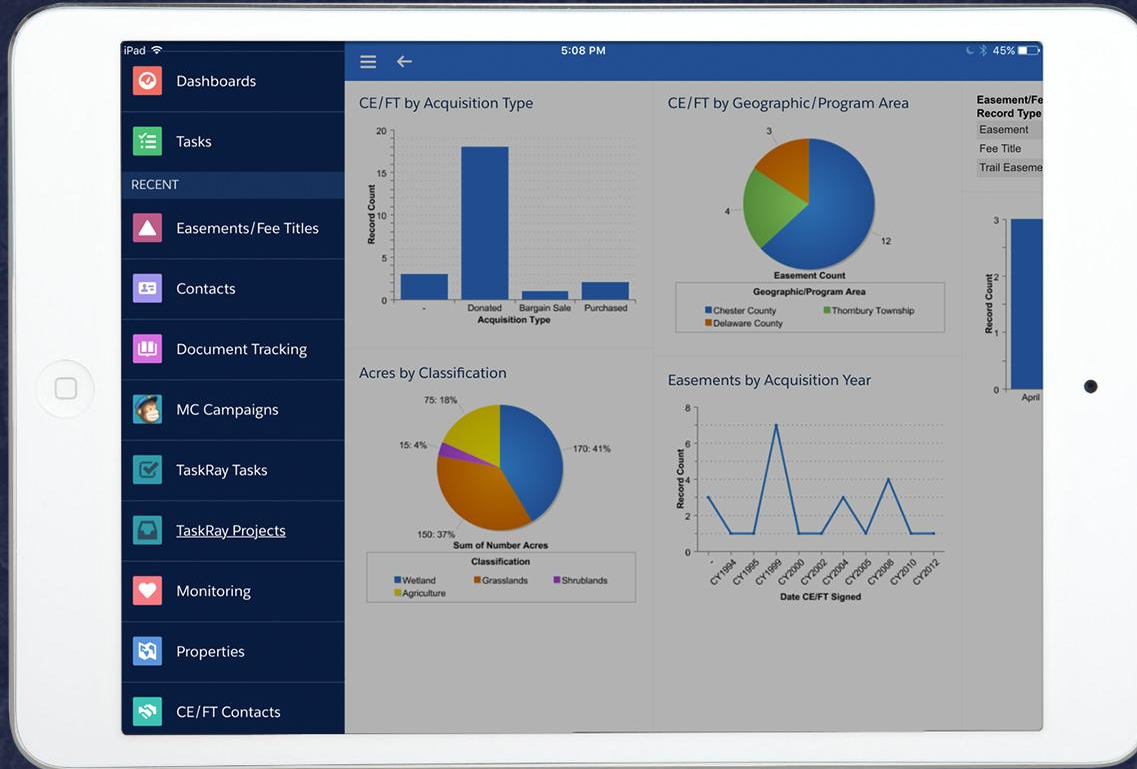


October is all about pink...

CONGRATULATIONS FROM BACKOFFICE

ANUM & DHAVAL

MANAGE, MONITOR, AND REPORT



MANAGE PROPERTIES

Multiple easements can be associated and tracked within a specific property.

MONITOR EASEMENTS

Monitor water and mineral rights, and even acreage information related to categories such as wildlife protection, grasslands, wetlands, etc.

REPORTING

We have dozens of standardized reports that can be customized to your land trust's needs.

TESTIMONIALS

“BECAUSE OF BACKOFFICE THINKING'S EXPERTISE AND OUTSTANDING CUSTOMER SERVICE OUR LOCATE IMPLEMENTAION WAS MUCH EASIER THAN WE EXPECTED. I HIGHLY RECOMMEND BACKOFFICE TO ANYONE.”

ZAC WIEBE

Larimer County, Fund Development & Special Projects

“LOCATE HAS STREAMLINED THE WAY WE OPERATE OUR DAY TO DAY ACTIVITIES. WE CAN NOW EASILY TRACK AND MANAGE OUR EASEMENT/FEE TITLES, DONORS AND DONATIONS. OVERALL LOCATE HAS MADE US MORE EFFICIENT IN OUR CONSERVATION EFFORTS.”

STAFF

Mountain Area Land Trust

BUILT FOR LAND CONSERVATION

With **Salesforce** as the CRM database platform, **LOCATE** allows land conservation organizations to manage all land acquisition, stewardship activities, donor, membership and grant information.



BUILT ON SALESFORCE

Salesforce is your lightning-ready and powerful cloud-based donor database. It is the “engine” that runs LOCATE.



TRACK EVERYTHING

Get a 360 degree view across your operations. Track and manage all your land trust information.



OFFLINE MONITORING

Monitor land conservation by exporting and importing important activity data into LOCATE.

FEATURES FOR LAND TRUSTS

EASILY CAPTURE ALL YOUR EASEMENT/FEE TITLE DETAILS

- Conservation details and restrictions
- Easement value, funding sources
- Title policy, insurance info
- Stewardship information
- Easement contacts (e.g. grantor, owner, manager)
- Water, mineral, or other property rights
- Manage activities and tasks for all your processes

BETTER MANAGEMENT OF YOUR MONITORING PROCESS

- Track monitoring due dates
- Produce the property monitoring report
- Track date and status of previous monitoring
- Track who does the monitoring
- Track monitoring visit details
- Record violations and follow-up tasks
- Track records and documents for state and national accreditation

MORE EFFECTIVELY RUN YOUR ORGANIZATION INCLUDING MEMBERSHIP AND FUNDRAISING

- View dashboards and reports for your key metrics
- Create unlimited reports through the standard and flexible reporting tool
- Track funds raised through membership dues, events, campaigns and appeals
- Track service fees or other fees related to an easement
- Obtain 360 degree of constituents by tracking land conservation data and donor data in one system

LOCATE

DEMO TIME!



DONNA WHITIG
LOCATE Product Manager

LOCATE

SALESFORCE APP FOR LAND TRUSTS

