

## **CHEBEAGUE AND CUMBERLAND LAND TRUST**

### **Baseline Documentation Policy**

It is the policy of Chebeague & Cumberland Land Trust (CCLT) to prepare a Baseline Documentation Report (BDR) for each conservation easement prior to acquisition or to have a plan to complete one within a reasonable amount of time after the closing.

The BDR will accurately portray the condition of the property as of the recording date of the conservation easement. It will include only data directly related to the terms and conservation values protected within the easement. The BDR will contain, at a minimum, specific information to conform to prevailing national land trust standards and practices.

If for any reason the BDR cannot be finished prior to closing, a preliminary baseline is to be prepared with available information and signed by the grantor and CCLT at closing. In the case of a preliminary report, it is the policy of CCLT to have the final BDR prepared and signed by the landowner and CCLT within a year (12 months) of acquisition.


If a conservation easement was accepted prior to the adoption of this policy and does not have a BDR, CCLT will prepare a BDR as soon as reasonably possible. A BDR created after the acquisition of a conservation easement must be based on the current conditions of the property, and signed by the current landowner(s) and CCLT.


If a property owner intends to qualify for federal tax benefits, the BDR must include data sufficient to meet US treasury regulations.

The BDRs are to be stored in compliance with the CCLT's current Records Policy.

Please see CCLT's recommended list of baseline requirements.

Certified by:

  
Kerry McCormack, Secretary

  
Date

**CHEBEAGUE & CUMBERLAND LAND TRUST**  
**Baseline Documentation Report**

**I. Title Page:**

*Title of Easement (as the land trust has it filed), Land Trust name, date of completion, BDR preparer(s) and their affiliations.*

**II. Letter of Transmittal**

*Letter from BDR preparer (optional).*

**III. Table of Contents**

**IV. Acknowledgement of Property Condition**

**ACKNOWLEDGEMENT OF PROPERTY CONDITION**

In compliance with Section 1:170A-14 (g) (5) of the federal tax regulations, the undersigned accept and acknowledge that this Baseline Documentation Report is an accurate representation of the property at the time the Conservation Easement was transferred to the grantee.

*(Note: If the BDR was not completed at the time the conservation easement was transferred, this language needs to be changed to specify that all details in the BDR represent current conditions.)*

**OWNERS**

**(HOLDER)**

By: \_\_\_\_\_

By: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Printed

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Title: \_\_\_\_\_

By: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Date: \_\_\_\_\_

STATE OF \_\_\_\_\_

COUNTY OF \_\_\_\_\_

The foregoing instrument was acknowledged before me this \_\_\_\_ day of \_\_\_\_\_, 2010, by \_\_\_\_\_.

\_\_\_\_\_  
Notary Public

My Commission Expires:

**V. Purpose of the Conservation Easement:**

*Recite conservation values as stated in the easement document. The conservation values are the purpose for protecting the property, such as wildlife habitat and public benefits such as open space, historic, or recreational resources.*

*Example:*

*It is the purpose of this Conservation Easement to provide significant public benefit by conserving forever the scenic, natural, recreational and wildlife habitat values of the Protected Property and to protect and foster its ecological health through sound forest management practices.*

**VI. Property Background Information:**

- a) Landowner Information (*Contact information for grantors and landowners (if different). May also want to include names and phone numbers of any land managers, gatekeepers, etc.*)
- b) Legal Description (*Include property deed/book page, acreage, map/lot number, recording date of the deed*)
- c) Tract Location and Access (*Include directions and access information, and a general location map*)
- d) Tract Description (*General description of the Protected Property including landscape and current use*)
- e) Natural Features (*This section only needs detailed information (e.g. botanical and wildlife lists) if the Conservation Easement explicitly protects such features. Otherwise, only general information is needed. Note aquatic resources, including location of streams, water bodies and wetlands; and forest or natural community types. May also include rare and wildlife species habitat, major soil types, and special status of any of the site's natural features.*)
- f) Archeological and Historical Features (if applicable) (*Note any significant archeological, cultural and/or historical features on property*)
- g) Field Work

*Example:*

*Field work was carried out by \_\_\_\_\_ on \_\_\_\_\_.*

**VII. Restrictions and Reserved Rights:** (*Documentation of existing conditions as they relate to the easement's restrictions and reserved rights*)

*Example:*

*1. Land Uses*

*“The Protected Property may be used only for conservation, non-intensive outdoor recreation, and forest management activities, all as permitted under the terms of this Conservation Easement.*

*No industrial, residential, quarrying, mining, large-scale commercial groundwater extraction or building development activities are permitted on the Protected Property.”*

*Observed Conditions:*

*The conservation and recreation uses of the Protected Property appear to have been protected. At the time of this baseline, no forest management activities were noted.*

*At the time of this baseline, no industrial, residential, quarrying or mining activities were seen on the Protected Property. No evidence of commercial activities or building development activities was seen.*

**VIII. Adjoining Landowners:** *(Names, map & lot numbers, and contact information)*

**IX. Maps:** *(All maps should contain: clear property boundaries; north arrow and scale; date map created; and identification of map preparer.)*

- a) Tax Map *(showing adjacent properties)*
- b) Regional Map *(general location map with property location marked, for directions to property)*
- c) Town Map *(with property location marked)*
- d) USGS 7.5 minute (1:24,000) topographical map *(with property boundaries marked)*
- e) Sketch of Structures, if applicable *(buildings should be measured and drawn to scale)*
- f) Map of easement area within property (if different) *highlighting existing manmade improvements or incursions (such as roads, buildings, fences etc.), distinct natural features (such as large trees, aquatic areas, etc.), protection zones/special use areas, building envelopes, reserved rights, trails, public access areas, etc.*
- g) Natural Features Map
- h) Photo documentation map over aerial photo or orthophoto of property *(note location and direction of all photo points)*

**X. Photographic documentation:**

*This is a photographic record of the protected property that is periodically updated. This section should include photos that are easily replicable (from roads or permanent features, or using GPS waypoints).*

- a) Photos should include property markers, existing structures, existing surface alterations, and other key features. Ideally, each feature should be photographed from at least two directions.*
- b) Photos should be numbered and a compass direction should be included to note the direction the photo was taken.*
- c) Include a photograph index with descriptions.*

**X. Methods:** *(Information about the BDR preparer, protocols, equipment and activities)*

**XI. Attachments:**

1. Conservation Easement and related documents.
2. Phase 1 report, if available.
3. Any existing management plans.

*A Phase 1 report is an environmental report which contains information on the historical uses of a property and its surrounding areas to evaluate any possible environmental concerns, such as soil or water contamination. Such a report would be performed before a property is purchased.*