

**CHECKLIST FOR ACQUISITION  
OF CONSERVATION EASEMENT (Donation or Purchase)  
Approved by Land Protection Committee: May 2, 2012**

The sections below are numbered for convenience only. The steps will not always take place in the same order in which they are numbered.

1. Landowner or local chapter initiates discussions about the project.

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

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

2. Chapter representative visits the land to evaluate the property and ascertain the objectives of the landowner.

Date of Visit: \_\_\_\_\_

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

3. In the case of a donation, the landowner is advised that there will be costs involved with the project toward which the landowner will be asked to contribute.

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

Person Responsible: \_\_\_\_\_

4. A project proposal, (using the TPE standard template) is prepared by the chapter and submitted to the TPE Land Protection Committee. The Committee shall determine whether the project meets the criteria for pursuing land protection projects.

a. If yes, it is referred to the Board of Directors for approval together with all of the supporting materials called for in the project proposal, location map, property configuration, supporting aerial photos and property description. Costs associated with the project and funding sources are also provided. The committee shall provide the Board with its ranking information. The Board may give its preliminary approval.

b. If the project does not meet the criteria, the committee shall advise the Board why not and whether the project could be modified to meet the criteria.

Date Submitted to Board: \_\_\_\_\_

Submitted by Whom: \_\_\_\_\_

- c. If approved by the Board, the Land Protection Committee, in coordination with the chapter, shall appoint a TPE representative as Project Manager. Where required by the funding grant source, the Project Manager shall be approved by the full Board.

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

Name of Representative: \_\_\_\_\_

- 5. TPE sends the Purchase Engagement Letter or Donation Engagement Letter, whichever is appropriate, to the landowner.

Date Engagement Letter Sent: \_\_\_\_\_

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

- 6. If TPE will purchase the easement, the Project Manager will commission an appraisal. The Project Manager will also commission an appraisal in the case of some donations in order to establish credits or for other purposes.

- 7. The Project Manager works with TPE's attorney and with the landowner and his or her attorney to prepare a conservation easement.

Date Easement Prepared: \_\_\_\_\_

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

Date Presented to Board: \_\_\_\_\_

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

- 8. Once the conservation easement is completed, the Project Manager will commission a title insurance commitment.

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

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

Date Presented to Board: \_\_\_\_\_

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

- 9. The landowner is asked to sign a letter of commitment stating the amount and timing of any donation to the Land Management Trust, Legal Defense Fund and/or Easement Monitoring Fund, as appropriate.

Date Request Made: \_\_\_\_\_

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

Amount: \_\_\_\_\_

10. As appropriate, TPE will initiate fundraising inquiries and submit grant applications appropriate to carry out the project.

Date and Nature of Fundraising and Grant Activities:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11. If it has been determined to be necessary, a land survey will be commissioned.

Survey Ordered: \_\_\_\_\_

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

12. The boundaries shall be determined and a personal inspection of boundaries shall be made.

Date of Inspection: \_\_\_\_\_

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

13. Baseline documentation shall be prepared to record the current state of the property insofar as it relates to the conservation easement.

Date Baseline Documentation Completed: \_\_\_\_\_

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

14. The landowner shall review the baseline documentation.

Date Provided to Landowner: \_\_\_\_\_

15. When the project is ready to close, it will be reviewed by the Land Protection Committee. If the Land Protection Committee determines it is ready for closing, it will be referred to the full Board for final approval.

Date of Final Review by Project Manager and Attorney: \_\_\_\_\_

Approved? Yes \_\_\_\_ No \_\_\_\_

Date of Final Review by Land Protection Committee: \_\_\_\_\_

Approved? Yes \_\_\_\_ No \_\_\_\_

Date of Final Review by Board: \_\_\_\_\_

Approved? Yes \_\_\_\_ No \_\_\_\_

16. After approval by the Board the baseline and the conservation easement shall be signed and recorded in the public records.

Date Baseline Signed: \_\_\_\_\_

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

Date Conservation Easement Signed: \_\_\_\_\_

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

Date Conservation Easement and Baseline Recorded: \_\_\_\_\_

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

17. The Project Manager will order the final title insurance policy.

Date Final Title Insurance Ordered: \_\_\_\_\_

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

18. If a Land Management Plan has not already been prepared for the property, the chapter will draft and submit to the Land Management Committee a Management Plan which it will create pursuant to the procedures of the committee. If the property is part of a larger project, a Conservation Plan will be created.

Date Land Management Plan Created: \_\_\_\_\_

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

Date Conservation Plan Created: \_\_\_\_\_

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

19. In the case of a donation or bargain sale, TPE will send a gift letter to the owner. With the gift letter TPE will send the Internal Revenue Service Form 8283 for the donor to complete with instructions to send to the appraiser who will forward it to TPE. The owner will be requested to provide TPE with a copy of his or her appraisal.

Date Letter Sent: \_\_\_\_\_

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

20. The easement will be added to the monitoring program. After the conservation easement has been recorded, the easement will be added to the annual monitoring program for annual visits and reports.

Date Added to Monitoring Program: \_\_\_\_\_

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