

CHECKLIST FOR FEE TITLE ACQUISITION (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 donated property, the landowner is advised that there will be costs involved with the project toward which the landowner will be asked to contribute in the case of donated property.

Dated Completed: _____

Advised by Whom: _____

4. A project proposal, (using the TPE standard template) is prepared by the chapter and submitted to 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 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.

Dated Submitted to Board: _____

Submitted by Whom: _____

- c. If approved by the Board, the Land Protection Committee, in coordination with the local 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: _____

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

Date Engagement Letter Sent: _____

By Whom: _____

- 6. If TPE will purchase the property, 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.

Date Appraisal Ordered: _____

By Whom: _____

- 7. The project manager works with TPE's attorney and the landowner and his or her attorney to prepare an offer to purchase or an option for purchased land or a written commitment for donated land.

Date Offer or Title Option Ordered
or Written Commitment for
Donated Land Obtained: _____

By Whom: _____

- 8. The project manager will commission a title insurance commitment.

Date Title Commitment Ordered: _____

By Whom: _____

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

Date of Inspection: _____

By Whom: _____

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. When the project is ready to close, it will be reviewed by the project manager and the attorney for TPE. When it receives their approval it shall be referred to the Land Protection Committee for final approval. If it is approved by the Land Protection Committee it shall be referred to the Board for its approval.

Date of Final Review
by Project Manager and Attorney: _____

Date of Final Review
by Land Protection Committee: _____

Approved? Yes _____ No _____

Date of Final Review by Board: _____

Approved? Yes _____ No _____

13. If the Board approves the acquisition, the sale shall be closed and the deed recorded.

Date Deed Recorded: _____

By Whom: _____

14. 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: _____

15. 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: _____