

Santa Fe Conservation Trust

BASELINE DOCUMENTATION POLICY

Policy 2013 • 03

Adopted On: January 19, 2013; Updated: December 4, 2018

Updated:

Philosophy Statement

A baseline documentation report is a written and visual report - a snapshot of the property at a single point in time - that describes the physical and biological condition of a parcel of land that is intended to be made subject to a conservation easement at the time the easement is granted. Santa Fe Conservation Trust ("SFCT") prepares baseline property reports for all lands as to which it is asked to hold a conservation easement, and it updates the baseline with supplementary reports on a regular basis. Each separate conservation easement will have a corresponding baseline documentation report. The following guidelines apply to all SFCT baseline documentation reports. SFCT encourages easement donor participation in the baseline preparation to the greatest extent possible.

Timing

The initial baseline report must accurately represent the condition of the property at the time the easement is recorded and clearly document the conservation values protected under the easement. Therefore, a report should be completed before or at the time the conservation easement is executed, while ensuring there is adequate time for the landowner to review and suggest changes to the report. Ideally the report will be completed and signed by the land trust and the landowner at the same time the conservation easement is executed. Much of the information needed to complete a baseline report will already be available from the initial due diligence process of assessing whether the property is eligible for a conservation easement. In the unusual event that weather conditions do not allow for sufficient information to be gathered prior to executing the easement, SFCT and the landowner will sign a schedule for finalizing the full report and acknowledgement of interim data that meets Treasury Regulation § 1.170A-14(g)(5)(i).

Recordation

Two original signed copies of the baseline report are required; one for the landowner and one for SFCT. SFCT's original copy will be secured in its off-site archive storage area. If more than one landowner is involved, additional copies of the report should be prepared for each landowner. Two copies of the baseline report will remain in the SFCT office: one for use with the field binder and one for use in the office binder. For remote access and archival purposes, a PDF copy of the baseline report will be made and kept on SFCT's computer network. Each time a conserved property changes ownership, as soon as it learns of the change SFCT will provide a copy of

the original baseline report to the new landowner along with any baseline updates. These documents are intended to educate the landowner as to the conservation values being protected under the easement.

Baseline Preparation

Field visits during the baseline assessment period require considerable preparation to ensure efficient and comprehensive collection of needed information. Prior to field visits, the observer should prepare as follows:

- (1) Become acquainted with all preliminary information, including maps, photos, property location, landowners' conservation interests and available resource information
- (2) Prepare maps or photos with property boundaries, locations of known resources and conservation interests
- (3) Prepare a preliminary photo documentation map to help the observer identify representative photo points
- (4) Identify resources that will require additional consideration and invite necessary experts
- (5) Determine the best time of day for field surveys (e.g., early mornings for breeding-bird surveys)
- (6) Obtain landowner permission for site visits
- (7) Prepare needed materials, including:
 - Forms
 - Resource records
 - Maps
 - Photos
 - Compass
 - Digital camera with extra batteries
 - GPS unit
 - Measuring tape
 - Plant, field identification books
 - Photo documentation data form
 - Colored pens/pencil
 - Binoculars
 - Hand lens
 - Flagging tape
 - Plant press
 - Plastic bags
 - Clipboard

A baseline report may be completed by staff or by a qualified volunteer or consultant under staff supervision. The report should identify the person(s) completing the report, when the property was visited and by whom and when photographs were taken and by whom. Only a staff person or board member can sign a property report certification on behalf of SFCT, so the conservation staff person responsible for the project must be familiar with the property and the property report language.

Contents of Baseline

The baseline report should contain any and all information necessary to describe the physical and ecological condition of the property at the time the conservation easement is completed with respect to the conservation values being protected by the easement and the restrictions contained in the easement. SFCT has a standard template for baseline reports. Instructions on the details to be included in each component are set out in the template. Additional components may be included if useful or helpful in understanding, monitoring and enforcing, the easement. These items should be identified in the table of contents.

Photographs

Santa Fe Conservation Trust requires the landowner(s) to sign the acknowledgement page accepting and acknowledging the total number of pages in the Baseline including documents, maps and photographs. The page number formatting should be Page 1 of Total Number of Pages.

Baseline Updates

Because a land trust uses the baseline report to evaluate whether conservation easement terms have been followed, whether reserved rights have been exercised and whether affirmative obligations have been met, the baseline report should always reflect the current state of the property. The original baseline report cannot be altered, but corrections for mistakes, to provide supplemental materials, or updates, should be noted in a supplemental baseline report. Changes to the land that should be reflected in baseline updates include natural changes, such as those caused by wildfires, flood or earth movement, as well as human-made changes, including the exercise of rights reserved in the conservation easement by the landowner (such as the right to build a new home or a new road, or to subdivide the property), or the fact that certain restoration or enhancement actions were conducted on the property.

Any revision to or update of a baseline report should contain; on its first page, a statement such as the following:

"This is a supplement to an existing baseline report, the purpose of which is to update and add information that was not included or was unavailable at the time the conservation easement was completed for the PROJECT NAME AND FILE NUMBER located in the COUNTY, New Mexico. It is important to note that this supplement does not replace or void the original baseline report completed by the Santa Fe Conservation Trust dated ORIGINAL BASELINE DATE.

This supplement was prepared shortly before the parties signed the supplement and was not prepared in anticipation of litigation. Rather, preparation of this supplement conforms to the land trust's ongoing efforts to bring older land trust documents up to current best practices in the land conservation field. This supplement was prepared by

(name) who has direct knowledge of the facts in the supplement. This supplement will become part of the monitoring workbook to aid in the long-term monitoring and stewardship of the property."

Joanna Drueke, Chair, SFCT
Brant Goodman, Secretary, SFCT