

Baseline Documentation Report



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- A Baseline Documentation Report (BDR) is a record of the condition of the property at the time the conservation easement is granted in order to form the basis of future monitoring and enforcement over time.
- It establishes the “baseline” against which changes (both manmade and natural) are to be evaluated.
- A BDR provides critical information that isn’t necessarily found in the conservation easement, including maps and photographs of the protected property, a full description of the values being conserved and existing manmade improvements, management plans and other information critical to understanding the property.

Why create baseline documentation?

- If the easement is donated, the IRS requires it.
- Tool in preserving perpetuity of easement.
- Easement holder needs to be able to enforce easement and understand changes occurring on the landscape over time.
- Assists with long-term relationship with landowner and with monitoring visits.

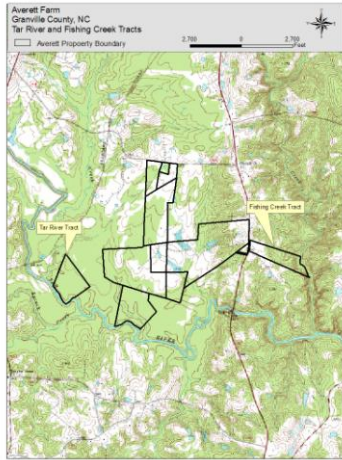


What should be included in baseline documentation?

- Preparer(s) name.
- Date completed.
- Statement signed by landowner and easement holder stating baseline is “an accurate representation of the protected property at the time of transfer.”
- Landowner contact information.
- General property description.
- Address/directions
- Preparer’s qualifications.
- Conservation values and property description.
- Description of structures and other human modifications.
- Description of natural features.
- Locator map.

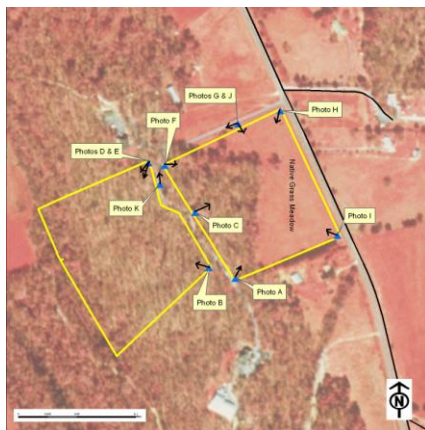


What should be included in baseline documentation?



- A USGS map showing the property lines and other nearby protected areas;
- Aerial photograph at appropriate scale taken as close as possible to date of easement;
- Map of Natural/Human Features;
- Map to scale showing soils, vegetation and identification of flora and fauna, land use history and distinct natural features;
- Map(s) of easement area relative to overall property.
- Description of map waypoints.

Baseline Documentation Photos



- On-site photographs and conditions of any natural resources to be protected and a map(s) of photo points and table with description.
- Helps orient future monitors and landowners as to where the easement restrictions apply to what portion of the property.
- Help identify areas of importance, as reflected in the easement.
- Help identify how the easement terms relate to the baseline.

What else could be included in baseline documentation?



- Copy of conservation easement.
- Natural Heritage data and supporting information.
- Any existing management plans (ag conservation plans, forest mgmt, etc.)
- Legal documents (appraisal, survey, title work)
- Background information (history of the project, funding sources, communications, etc.)

How to Begin

- Read the easement
 - What's restricted?
 - What's protected?
 - Where are the likely violations going to occur?
- Could a lay person understand the terms of the easement?
- How can the baseline documentation support the easement?



Additional Questions to Consider

1. What would you include in the BDR to substantiate all the conservation values intended for protection and the public benefit as referenced in the easement excerpts (to help meet IRS requirements)?
2. What information or materials would you incorporate in the BDR that might be of interest to:
 - a. A future landowner
 - b. Soil and Water Conservation District/land trust representatives
 - c. Person on the ground monitoring the easement
3. What information or materials would be useful to include in the BDR to withstand legal challenges?