



34 Wall Street, Suite 802 Asheville, NC 28801 www.appalachian.org
(828) 253-0095 (828) 253-1248 fax

Steps in the process of completing a land conservation transaction

1. Initial Evaluation:

- SAHC staff has initial conversation with landowner and delivers informational Landowner packet.
- Landowner returns completed questionnaire from Landowner packet to SAHC.
- SAHC staff reviews completed landowner questionnaire, and prepares a contextual map of proposed conservation project.
- Discuss landowner's goals for the property.

2. Site Visit: (Some projects will not require a site visit.)

- SAHC staff visits and photographs the land, usually with the landowner.
- SAHC staff and landowner discuss proposed project in greater detail.
- Discuss potential easement costs including the SAHC stewardship fund, appraisals, survey, title work, access, and other legal issues, environmental due diligence and outside review of conservation easement and other transaction costs.
- SAHC staff evaluates proposed conservation easement under SAHC Project Selection Criteria.

3. Organizational Board Approval Process:

- SAHC staff presents proposal and Project Selection Criteria to Land Protection Committee for review/recommendation.
- SAHC staff presents recommendation of Land Protection Committee to the Board of Trustees at quarterly meeting, for Board authorization to proceed with Conservation Easement process.

4. Due Diligence:

- Landowner and SAHC staff document mutual intention to proceed with land transaction
- Arrange for title work, including legal access from public road – SAHC Staff.
- Order Phase I Environmental Assessment – SAHC Staff.

- Obtain any existing surveys of the property; order survey if needed. Allow for 30 days completion – SAHC Staff.
- Request mortgage subordination (if necessary) – Initiated by Landowner.
- Order Appraisal to be completed within 60 days of Closing – If a donated easement then the Landowner is responsible for obtaining the Appraisal.
- Landowner provides a copy of appraisal to SAHC before Closing for review. SAHC Staff reviews appraisal and discusses with landowner.
- Draft and negotiate terms of the conservation easement. – SAHC Staff with Landowner.
- Obtain legal review of conservation easement document – SAHC and Landowner
- Calculate and discuss suggested stewardship contribution by the landowner. Landowner signs pledge for stewardship funding.
- Obtain legal description – SAHC Staff.
- SAHC staff provides landowner with instructions for seeking federal tax deduction and NC State income tax credit.

5. Baseline Documentation Report Process: (for Conservation Easements only)

**The Baseline Documentation report provides a snapshot of the natural condition of the property and its conservation values at the time the Conservation Easement is closed. It is used as the basis for SAHC's annual visit.*

- Arrange for baseline inventory of property, either by SAHC staff or consultant.
- SAHC staff completes and documents baseline fieldwork consisting of photos, maps and text reflecting the findings of the field work.

6. Conservation Easement Closing:

- Landowner signs acknowledgement of baseline condition of property.
- Landowner signs Conservation Easement and the document is recorded.
- Landowner makes stewardship contribution.

7. Post-Closing

- Landowner requests SAHC signature of IRS Appraisal Summary Form 8283 (if applicable).
- Mark Conservation Easement boundary with SAHC signs.