

**GLOCESTER LAND TRUST**

**CONFIDENTIAL – FOR INTERNAL USE ONLY**

**DONATION OF CONSERVATION EASEMENT  
Project Planning Checklist**

**PROJECT NAME:**

**ACRES: ROAD/LOCATION:  
ADDRESS:**

**TOWN: GRANTOR'S NAME:**

**(W) PHONE #: ( )**

**(H) PHONE #: ( ) E-MAIL:**

**FAX #:**

**CONTACTS: Specify role and Names/Addresses/Phone #/Fax #/E-Mail**

- **ATTORNEY** \_\_\_\_\_  
–
- **APPRAISER** \_\_\_\_\_
- **SURVEYOR;** \_\_\_\_\_
- **BDR\_PREPARER** \_\_\_\_\_  
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- \_\_\_\_\_
- \_\_\_\_\_

NOTE: This form outlines the steps generally followed in completing a Gloucester Land Trust land project. All steps identified as required should be completed BEFORE the Land Trust accepts an easement.

The form serves as both a tracking sheet for transaction planning and as a record of the history of the project.

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**Initial contact:** Landowner initial contact re easement: Date: \_\_\_\_\_

- Site visit (required)  
By: \_\_\_\_\_ Date: \_\_\_\_\_
- Landowner meeting (required)  
By: \_\_\_\_\_ Date: \_\_\_\_\_
  - Landowner materials received:
    - Copy of deed/legal description
    - Copy of property tax statements (or obtain from assessor)
    - Copy of survey
- Introductory letter: GLT requirements (Class 1 survey, pins, stewardship gift request). Date: \_\_\_\_\_
- Disclosure statement sent - Landowner must arrange independent legal and tax advice. Date: \_\_\_\_\_
- Appraisal information for donors document sent. Date: \_\_\_\_\_

**Conservation Values and Natural Resource Review:** (Appropriate materials copied or cited in file)

- State or federal designations (wild and scenic river, scenic by-way, trout stream, etc.) reviewed.  
Identify: \_\_\_\_\_
- Other natural resource inventory, materials or plans reviewed. Identify: \_\_\_\_\_
- Gloucester Town Character area
- Scenic enjoyment and character
- Relationship to other protected lands-identify: \_\_\_\_\_

Notes (describe natural resources, reference Property Selection Criteria):

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**Public Benefit/Public Policies:** (Appropriate materials copied or cited in file)

- Town planning/zoning materials reviewed
- State or federal statutes reviewed
- Other-identify: \_\_\_\_\_

Notes (describe public benefit):

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**Environment Review** (required):

- Environmental review completed

Notes (Describe format of review, person(s) completing review, and major findings):

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**Project materials** (required):

- Project summary prepared
- Project resolution prepared

**Pictures:** Taken by: \_\_\_\_\_ Date: \_\_\_\_\_

- Filed (project files, property report, communications)

**Survey:** Ordered \_\_\_\_\_ Received \_\_\_\_\_

**Boundary Pins:** Completed \_\_\_\_\_

**Maps:**  Reference map

Topographic map

Aerial photograph map

Nearby Protected Properties

Other map (e.g., soils) \_\_\_\_\_

**Title work:** Ordered \_\_\_\_\_ Received \_\_\_\_\_

**Legal review -- including legal description, title, access, mineral rights, mortgage issues, easement**

Completed \_\_\_\_\_. Comments:

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**Approvals:**

- Acquisitions Committee review completed \_\_\_\_\_
- Board Receipt of Summary and other documentation \_\_\_\_\_
- Board Approval: \_\_\_\_\_
- Resolution dated and filed in project file \_\_\_\_\_

**Stewardship Cost Estimate:**

Baseline Documentation \_\_\_\_\_

Annual Monitoring \_\_\_\_\_

Landowner Relations \_\_\_\_\_

Administration \_\_\_\_\_

Grantee Approvals (based on CR Agt) \_\_\_\_\_

Enforcement \_\_\_\_\_

Risks/High-Cost Scenarios:

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Estimated Per-Annum Cost: \_\_\_\_\_

Principal Needed to Generate Income \_\_\_\_\_

Equal to Per-Annum Cost: \_\_\_\_\_

**Stewardship Commitment:** \$ \_\_\_\_\_

- Pledge received (\$ \_\_\_\_\_)
- Cash received: (\$ \_\_\_\_\_)
- Acknowledgment/thank you letter sent
- BDR payment: (\$ \_\_\_\_\_)

**Value:** \$ \_\_\_\_\_ = FMV easement      \$ \_\_\_\_\_ = FMV fee unrestricted

Easement as % of fee = \_\_\_\_\_

Source:

- Appraisal
- 8283
- Other-identify: \_\_\_\_\_

**Final easement:**

- |  |   |
|--|---|
| <input type="checkbox"/> Signed by the landowner | <input type="checkbox"/> Accepted by Land Trust |
| Project completed:                               | <input type="checkbox"/> File number assigned:  |
| Sent for recording:                              | <input type="checkbox"/> Returned               |
| Recording date:                                  | Document number: Vol __ Page __                 |

**Landowner thank you:**

- Letter from Chairman (with copy of signed easement ) sent

**Post closing landowner packet sent:**

- Recorded easement sent:

**Baseline report** (required at time easement completed):

- Completed
- Signed by landowner
- Signed by the Gloucester Land Trust:
- Sent to the landowner

**Appraisal**

- Received

**8283:**  8283 information sent     8283 received (copy filed with corporate records)     8283 returned

**Data Management:**

- Original easement documents stored off-site in fire-proof safe; copies of documents added to files and monitoring binders created; all documents scanned and stored electronically pursuant to GLT Records Policy  
Date: \_\_\_\_\_