

Upper Peninsula Land Conservancy
Baseline Documentation Policy
Part of LTA Standard 11 & 12

Board Approved: 13 June 2016

It is the policy of Upper Peninsula Land Conservancy (UPLC) to have a Baseline Documentation Report (BDR) for each conservation easement and fee-title held by UPLC.

- The BDR will be prepared by the staff, reviewed and approved by the Stewardship Committee, and presented to the Board of Directors for its review and approval prior to closing.
- The BDR for conservation easements must be complete and signed by all parties and notarized at or prior to closing
- The BDRs for fee-title properties (preserves and reserves) do not need to be signed.
- In the event that weather conditions (e.g., snow cover) prevent adequate site inspection, the BDR will be completed (including signatures for conservation easements) to the fullest extent possible, and an update will be completed as soon as practical when conditions allow (but no later than 6 months after closing).
- The BDR will, at a minimum, meet the Internal Revenue Service, U.S. Treasury Regulations, and Land Trust Alliance Standards and Practice requirements of baseline content. UPLC BDR contents are outlined below.

For all conservation properties, the BDR should include, but is not necessarily limited to:

- Signature page – Acknowledgement of Conditions and Date of Completion
- Dated signatures of the landowner and UPLC representative, stating that they both attest to the accuracy of the information contained in the report.
- Summary of conservation values and public benefits
- Property Location
 - Legal description – Whole property and protected area (if not whole property)
 - Documentation of legal access
- Property Description
 - Document existing conditions related to conservation easement restrictions and reserved rights, including written descriptions along with related maps and photos for items such as manmade improvements, and data that would influence the exercise of reserved rights.
 - Physical features – Topography, geology, soils, water resources
 - Biological resources – Vegetation, wildlife, rare species
 - Cultural resources – Historical, archaeological
 - Land use history and current uses
 - Other human impacts
- Maps –
 - Map types - Location, plat, topographic, aerial photo, soils, property boundaries, survey (if available), GPS track or other map of inspection route
 - Map features:

- Clearly show the property boundaries, north arrow, scale, date the map was created
- Contain features relevant to the enforcement of the easement, such as existing manmade improvements, roads, buildings, fences or gravel pits, vegetation and rare species, land use history, and distinct property features
- Contain special use areas, such as building envelopes, protected riparian zones, forest management zones, and etc.
- Photographs – Access points, plant communities, water bodies, improvements, special features
- Summary of Easement Purposes (for Conservation Easement properties)
- Other information that would make the material admissible as a business record in court, such as an indication that the record was created at or near the time of the event rather than later in anticipation of litigation.
- The authorship and qualification and/or experience of the baseline preparer