

CCALT's Baseline Documentation Report (BDR) Review Checklist

Ranch Name: _____

Report Prepared by: _____

Date Report Reviewed: _____

Note:

The following criteria have been drawn up to help the preparers of BDRs in creating reports that will have consistent formats, information and effectiveness for all of the conservation easements held by CCALT.

Informational needs will obviously vary, sometimes quite widely, from Property to Property. It is also important to reflect the terms and restrictions of the conservation easement document and not to include superfluous information that is not pertinent to the conservation values being protected by the conservation easement, or to insert conservation values that are inconsistent with those identified in the conservation easement.

I. Photographic Documentation:

_____ Clear, labeled and precisely located photographs

_____ Documentation covers as much of the Property as possible and in as much detail as possible

_____ All existing structure on the Property are documented (regardless of livability or structural dilapidation)

_____ Representative photos of all other improvements including but not limited to ditches and ranch roads.

III. GPS Information:

_____ Global Position Systems (GPS) coordinates were used to locate photo points, structures, and other important features of a property.

IV. Baseline Inventory Reports Should Contain the Following Items: Note, this list is not all inclusive. The specific terms of the conservation easement need to be reviewed to determine which information is necessary for the long term stewardship of the Property. For example, conservation easements with limits on impervious surfaces need to contain a calculation of the current existing total impervious surface on the Property.

A. Table of Contents.

_____ Page numbers and information included in each of the following sections.

B. Owner Acknowledgement Statement.

_____ All BDR's and will have their accuracy attested to at the time of the closing of the conservation easement in accordance with Section 1.170-14(g)(5)(i)(D) of the Federal Tax Regulations through a written acknowledgement signed by both the Grantor and Grantee of the conservation easement.

C. Summary information:

_____ Grantor's name, contact information, including all relevant phone numbers and email address, as well as property address

_____ Names and contacts for local managers

_____ Date or proposed date of easement acquisition

_____ Property acreage and legal description

_____ Detailed directions to the Property from the nearest town, including mileage to turns and important local landmarks.

_____ Supporting governmental policies

_____ Summary of the conservation values protected

_____ Donor's Intended Use of the Property

_____ Purpose Statement for the BDR

_____ Extent of investigation – Who did the work, when was the Property visited, who else was consulted for information that is in the report etc.

_____ Reference the attached Deed of Conservation Easement in the Appendices. Do not paraphrase the prohibited uses and reserved rights in the baseline document.

D. History of the Conservation Project

_____ This section can be developed through short conversations with the staff of CCALT and the landowners. This section should describe how contact was initiated between the two parties and why, who the key players were in developing the conservation easement, and if funding came to the project, noting who helped pay for the acquisition of the conservation easement. This section should also make clear if all the Property covered by the report is intended to be added into the conservation easement or if a multi-year conservation strategy is being contemplated.

E. Land Uses and Management

_____ **Historic**

This should include all of the known historical uses of the Property. Uses that are of particular interest are agricultural uses different than current uses, as well as past logging, mining, mineral extraction, and residential/recreational uses.

Current

This section should describe what the Property is currently being used for including residential, commercial, and recreational uses. Agricultural uses should be listed and then described in detail below.

F. Inventory of Property Improvements

This section is perhaps the most important in the entire BDR. Disagreements between landowners and land trusts often hinge on the construction of new buildings or Property improvements. For this reason it is critical that all existing improvements be detailed in the BDR. This information should include a description of all improvements, and all improvements should also be shown on a map and be fully represented in the photographic documentation. The following need to be listed in this section.

Inventory of Structures:

- Residential buildings, inhabited or not, and the square footage of each structure if required by the conservation easement's terms.
- Major agricultural structures such as barns, sheds, riding arenas and corrals, and the square footage of each structure if required by the conservation easement's terms.
- Minor agricultural structures such as loafing sheds, stock tanks, windmills and the like, and the square footage of each structure if required by the conservation easement's terms.
- Any recreational improvements present on the Property, and the square footage of each structure if required by the conservation easement's terms.

Access & Roads: roads, both public and private, paved and unpaved need to be located on a site map and preferably shown in photographs. This includes two-tracks present on the Property. Legal access to the Property as well as all other access should be clearly described and mapped. Any access rights third parties have to or across the Property should be described and mapped if necessary. Any access dispute should be described and mapped if necessary.

Right-of-Ways & Easements: Any and all utilities serving and/or located on the Property should be described and shown on a map. An evaluation of the title commitment for the Property can help with this portion of the report. It should be noted whether an easement exists across the Property for each utility.

Additional Structures: such as existing radio towers, cell towers, dumps, oil and gas wells, transfer stations, mines/gravel pits, cemeteries etc.

Fencelines: both interior and boundary fences, should be described. Any boundary disputes or areas where the boundary fences are not online with the legal description should be described and shown on a map.

_____ **Signs:** which exist on the Property should be documented.

_____ **Water Rights:** Any water rights which are adjudicated to the Property and tied to the conservation easement should be fully described including their source, amount used, decreed usage, delivery method, location, and condition of the infrastructure used for delivery, location of use of the water, general timing of use, and history of use. Any disputes or legal challenges regarding the water rights should also be fully described. A water rights map should be included in the appendices which locates all of the water infrastructure. In addition, all man-made ponds, stock tanks, springs, wells, and reservoirs which serve the Property should be documented, described and mapped, whether adjudicated or adjudicated.

_____ **Mineral Rights:** A general description of whether the mineral rights are whole or severed from title to the surface should be included. An extensive mineral ownership report is beyond the scope of the BDR. However, review of the title commitment for the Property can provide relevant information and information on whether a mineral report is being completed for the Property should also be included. If energy development is occurring on the property, all well sites and other related sites should be photographed, mapped, and described in the BDR. Any historic and/or past mineral development should also be noted.

G. Description of Property and Conservation Values

1. Physical Description

_____ **Topography**

A general description and notable landmarks referenced in the report.

_____ **Geology**

Note the underlying geology and any notable features located on the Property.

_____ **Soils**

Note the major soil types and their locations on the Property. Note the location and acreage of any soils of significance.

_____ **Hydrology**

Note natural water features found on the Property, watershed information and any other information related to water courses on the Property.

2. Vegetative Communities

_____ Description of the main vegetative community types found on the Property. The descriptions should also include human altered vegetative communities such as hay meadows or pastures. It is important to note the general locations of each community type and include a map showing the locations of the communities. It is very useful to note the dominant species in each vegetative community found on the Property.

3. **Agricultural Values**

_____ This section is a detailed description of the current agricultural operation on the Property. This should include a description of livestock operations, irrigated land and crop land.

4. **Wildlife Values**

_____ Each Property is used in different ways by wildlife and wildlife uses change over time. A description of the notable species found on the Property is a minimum for the report. Detailed descriptions of wildlife uses should be included only if there are notable uses described in the easement, such as elk or deer winter range, sage grouse leks or bald eagle nests. The Colorado Division of Wildlife and Colorado Natural Heritage Program have a large amount of mapped information which can be used in this section.

5. **Scenic, Open Space and Historical Values**

_____ This section should describe the public open space values that are protected by the conservation easement. These can include views of the Property from public roads or public lands, community buffers and the general protection of working agricultural landscapes.

_____ Historical and/or archaeological values are not known for many properties. These values should not be described in detail unless they are mentioned in the easement document.

H. Appendices

Information included in Appendices to the document are generally used for reference and can include a wide array of information depending upon the property. These typically include:

- _____ **Photographic Documentation.** Clear color photographs showing the Property, with a description of each photo and direction each photo was taken along with photopoints located on a map and GPS coordinates for each photopoint.
- _____ Regional Map (showing the location of and directions to the Property in a regional context)
- _____ Aerial Map
- _____ Improvements Maps
- _____ Environs Map (including public lands and other properties conserved with conservation easements)
- _____ USGS Topographic Map
- _____ Vegetative Community Map
- _____ Soils Maps
- _____ Water Rights Map
- _____ Mineral Ownership and COGCC Maps(if necessary or applicable)
- _____ Relevant Habitat Maps and Colorado Parks and Wildlife Potential Wildlife Species List

_____ Bibliography

_____ Copy of the Conservation Easement. If the conservation easement is not completed before the baseline inventory is completed, reference this document in an Appendix and it will be added by CCALT once the easement is complete.

_____ Qualifications of the Report Preparers

V. Final Notes:

_____ In addition to the copy provided to the landowner, CCALT requires three copies of each baseline documentation report for our records. We request that at least one copy of the report be delivered to us unbound. In this way we will be able to update the reports as conditions change in the future.

CCALT will require digital information be created as part of the BDR, and such digital data must be given to CCALT for our files as part of the final product. The digital information shall at a minimum include:

_____ Geographic Information System (GIS) shapefiles, including property boundaries, vegetation boundaries, ranch roads, water infrastructure, utilities, and rights of ways. Any additional GIS files created should also be given to CCALT.

_____ CCALT will also require a copy of all original and unedited digital photographs used in the report be given to CCALT for our files.