

NeighborSpace of Baltimore County
Baseline Documentation Policy and Procedure

1. Background:

The Land Trust Alliance's Standards and Practices require that a land trust have a baseline documentation report (that includes a baseline map) on any land interest acquired prior to a real estate closing. Practice 11B provides, in pertinent part, that:

[b]aseline documentation records the condition of the property at the time of acquisition. Baseline documentation identifies existing physical conditions, natural and man-made, at the time of acquisition. It provides a baseline for measuring future changes in the property's conservation resources and other features. Baseline documentation is required by the IRS for tax-deductible donations of conservation easements. But it is a must for all conservation acquisitions ...*

The practice states, further, that the land trust should have standard procedures for preparing, storing and handling baseline documentation and that the following are typically included in the documentation: Date baseline documentation was prepared; Authorship and qualifications; Acknowledgement statement; Background information; Property description; Easement summary; Legal information; Conservation values; Maps or plans; and Photographs.†

2. Policy:

It is the policy of NeighborSpace of Baltimore County that every interest in land acquired shall have a baseline report compiled in accordance with the procedure below. That report will document the parcel's conservation values and the relevant conditions of the property as necessary to protect these values. Baseline reports will be conducted prior to closing and, where the interest conveyed is an easement, the report will be signed by the landowner and a land trust representative. Copies of the baseline report will be stored online and in the organization's fireproof safe and one will be provided to the property's designated manager. In the case of an easement, an additional copy will be provided to, and signed by, the fee owner at closing.

3. Procedure:

The following shall be compiled and/or completed prior to closing and shall comprise the Baseline Report. (See Baseline Documentation Checklist available on the NS Web Site, Property Monitoring Page):

- a. Statement of Purpose:
- b. General Information: GIS map, Photos, Plat
- c. Technical information:
 - i. Assessment information, SDAT map
 - ii. Survey
 - iii. Legal instrument conferring title
 - iv. Title report
- d. Title Insurance Policy
- e. Environmental: Phase 1 Report
- f. Financial and Board Action, including Contract with Property Manager.
- g. Initial Monitoring Report (What did it look like at acquisition?, what uses or structures surround the property so as to be able to determine future encroachment?, is there trash or debris?)

* Land Trust Alliance, Land Trust Standards and Practices, Practice 11B.

† Ibid.