



# Baseline Documentation for Protected Lands

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## **Workshop Topics**

What should be included in a Baseline Documentation Report (BDR)?

Where can you find the information?

What resources are available?



## **LTA Standards & Practices**

### **Standard 8: Evaluating and Selecting Conservation Projects**

#### **Practice F.**

#### **Documenting Conservation Values**

The land trust documents the condition of the important conservation values and public benefit of each property, in a manner appropriate to the individual property and the method of protection.



## **LTA Standards & Practices**

### **Standard 11: Conservation Easement Stewardship**

#### **Practice B.**

#### **Baseline Documentation Report**

For every easement, the land trust has a baseline documentation report (that includes a baseline map) prepared prior to closing and signed by the landowner at closing...



## **LTA Standards & Practices**

### **Standard 11: Conservation Easement Stewardship**

#### **Practice B.**

#### **Baseline Documentation Report cont.**

...The report documents the important conservation values protected by the easement and the relevant conditions of the property as necessary to monitor and enforce the easement...



## **Baseline Documentation Reports (BDRs)**

- Records the condition of the property at the time of easement acquisition
- Provides evidence of conservation values (public benefit)
- Provides a reference for future monitoring



## **Baseline Documentation Reports (BDRs)**

- Ideally completed prior to the signing of a Conservation Easement (or fee transaction)
- Generally prepared by the Grantee (Conservation Easement holder)
- Required by the IRS for tax-deductible donations

# Baseline Documentation Case Studies

Audubon Society of Rhode Island



# Case 1: Ecological Restoration

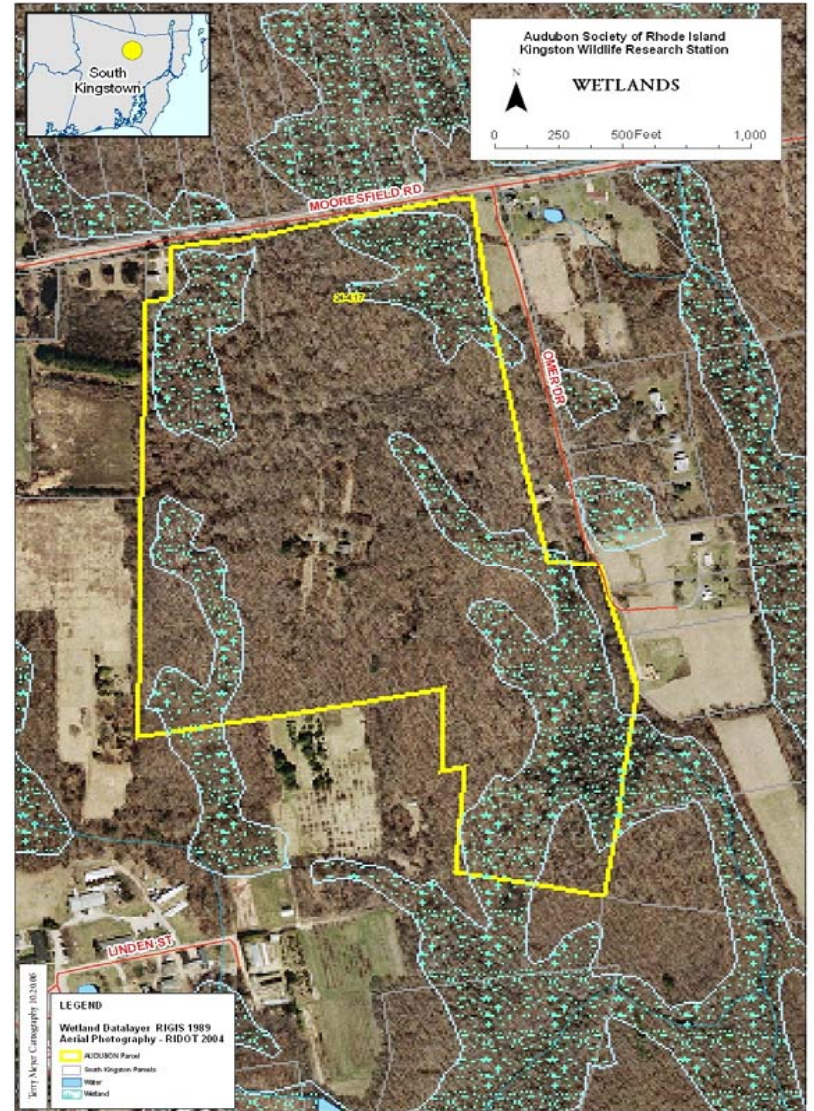
BDR used to choose a target or  
reference

# Kingston Wildlife Research Station



- Owned by ASRI yet still applicable
- Joint relationship with URI
- Long history of monitoring
- Borders easy to find

# KWRS from 1939-2004





# Restoration Rationale



# Restoring KWRS

December 2006 – July 2007



# Restoring KWRS

## December 2006 – July 2007



# Relevance for landowners in easement agreements





# Case 2: Ten Years After

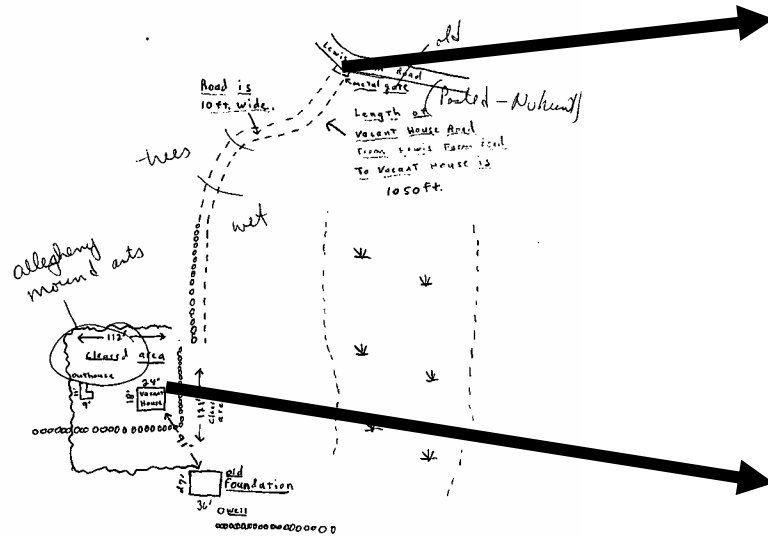
When a BDR helps with a  
long-overdue visit



# Baldwin Easement, 1995 to 2008

## EXHIBIT D

**Vacant House:** There is a vacant house in the northwestern region of the estate. There is a ten foot wide dirt road that leads to this house from an iron gate on Lewis Farm Road. The house is boarded up and is adjacent to an old shack/outhouse. House dimensions are 24' by 18'. The old shack dimensions are 9' by 11' in an L-shape. The house is approximately 830' south of Lewis Farm Road along the dirt path leading to it. There is an old stone foundation and well 91' south of the vacant house.



# Baldwin Easement, 1995 to 2008

- “Existing Conditions” still existing
- Landmarks still detectable
- Ecological descriptions still appropriate
- Horse pasture no longer with horses



Without a BDR?

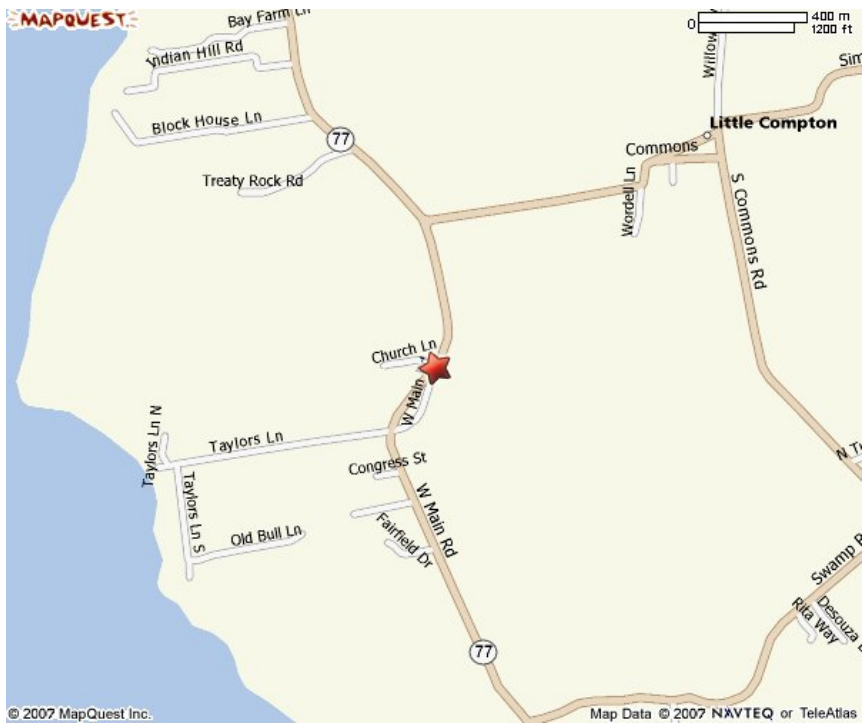


## **What should be included in a BDR?**

- Statement of Acknowledgement  
(with signature page)
- Table of Contents
- Purpose Statement

# What should be included in a BDR?

- File name, current landowner
- Location (plat/lot, street address, road map)
- Acreage information



Location Map



## **What should be included in a BDR?**

- Prior land uses (historic aerial photography, local history, etc.)
- Current land uses
- Future land uses (including summary of restrictions within CE)



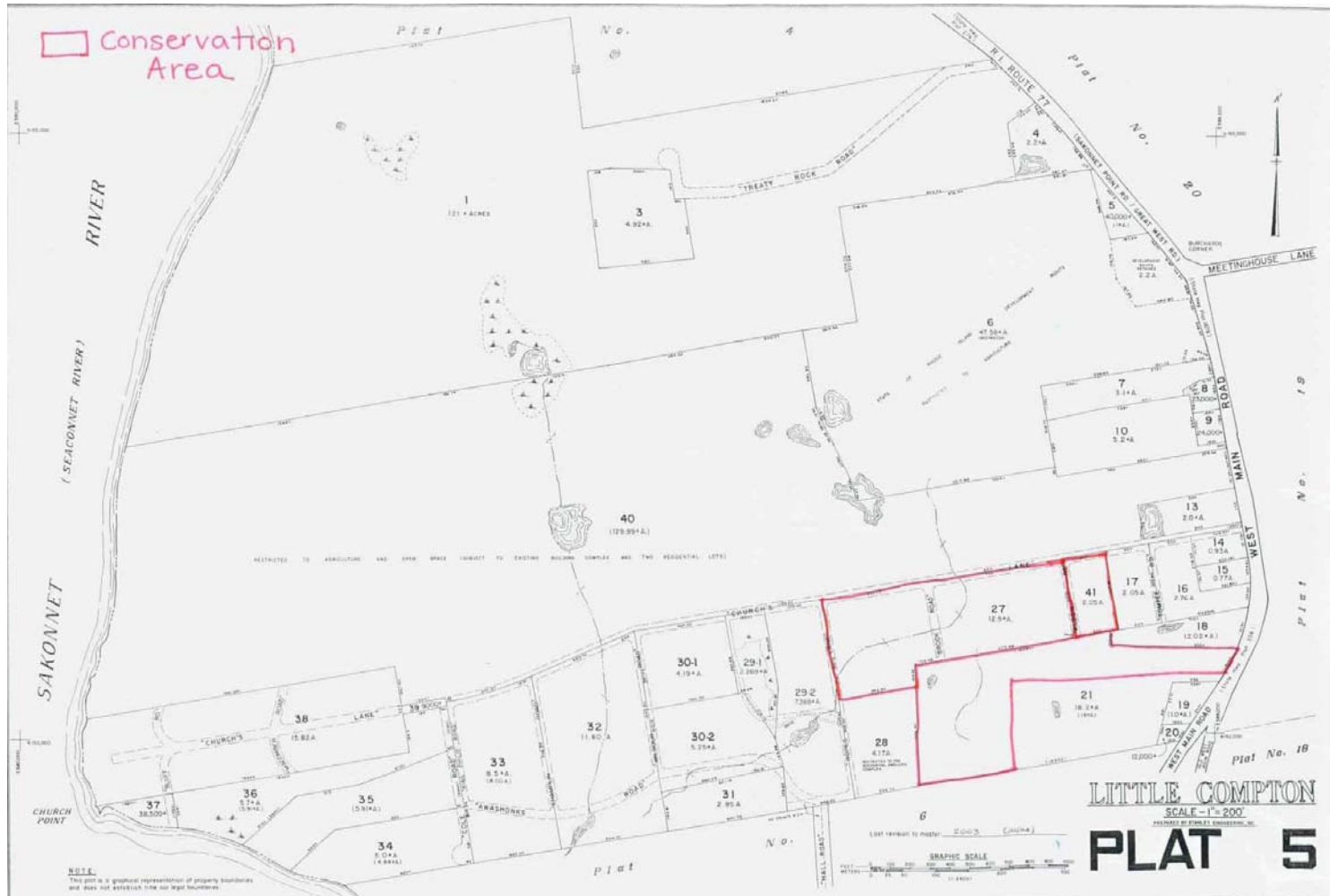


## Summary of Conservation Values

### Site Description:

- Landscape setting (surrounding landuse, nearby conserved lands)
- Topography
- Soil characteristics

# Tax Assessor's Plat Map




# Aerial Photo / Property Map



 **Property**

 Conservation Area

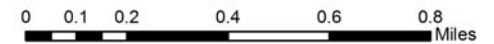
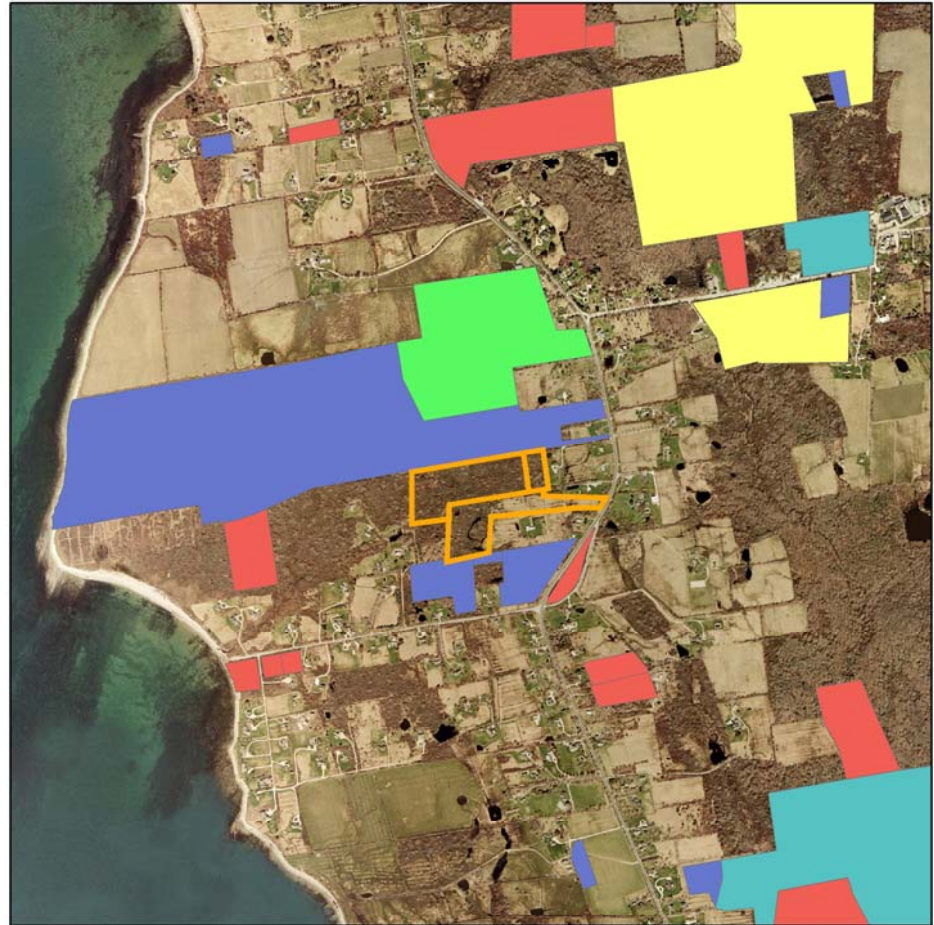
 Perennial Streams



0 135 270 540 810 1,080  
Feet

Created by:  
Carol Lynn Trocki, 12/2007  
For the Sakonnet Preservation Association  
Datalayers: 2003-2004 RIDOT 1:5,000  
scale digital true color orthophotographs,  
stream datalayer (from RIGIS).

# Landscape Context Map

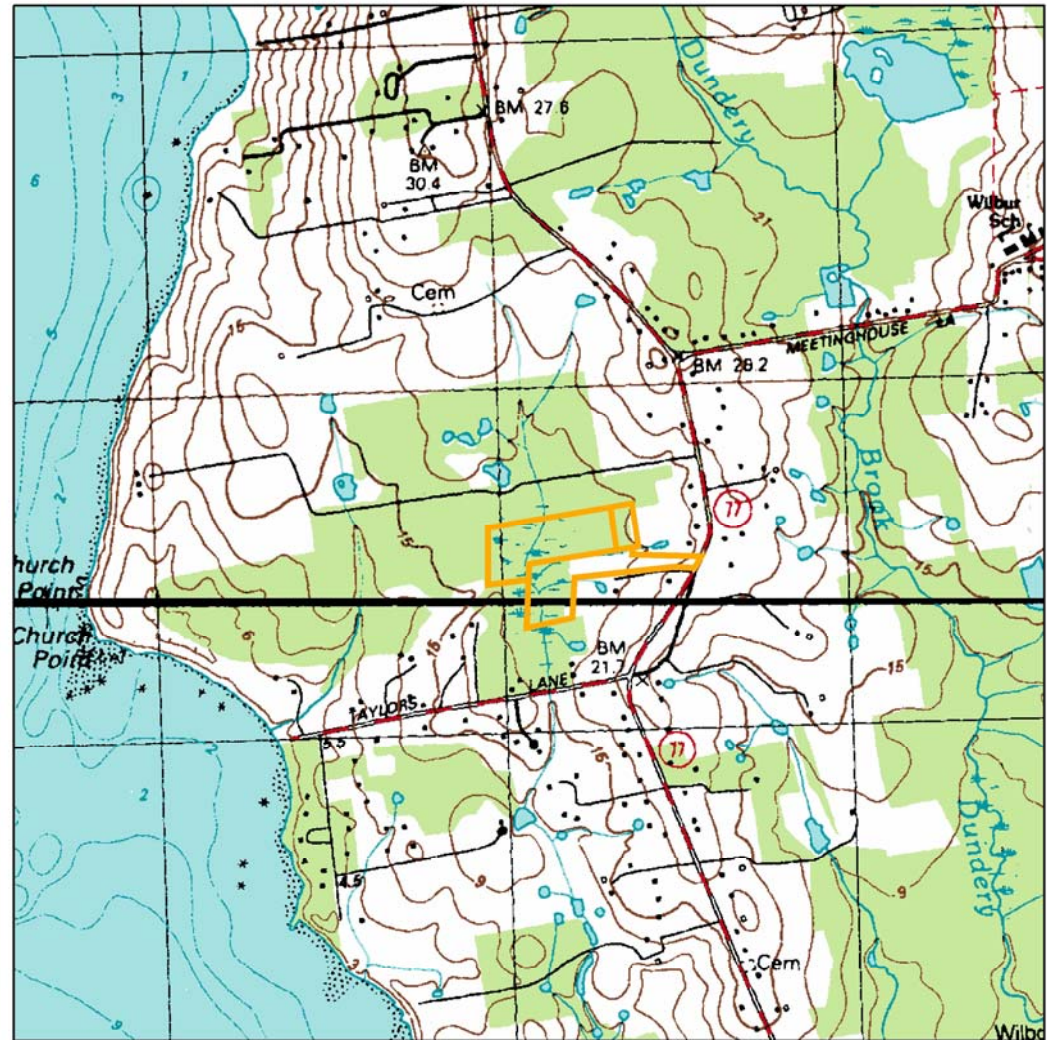


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Carol Lynn Trocki, 12/2007  
For the Sakonnet Preservation Association  
Datalayers: 2003-2004 RIDOT 1:5,000  
scale digital true color orthophotograph;  
Conserved Lands Datalayer, RIDEM, 4/2007  
(from RIGIS).

# Topographic Map

- elevational change
- topographical features

Source: USGS  
topographical quads



 **Property**  
 Conservation Area



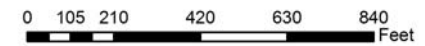
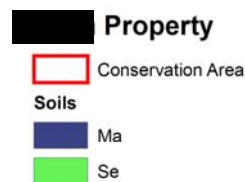
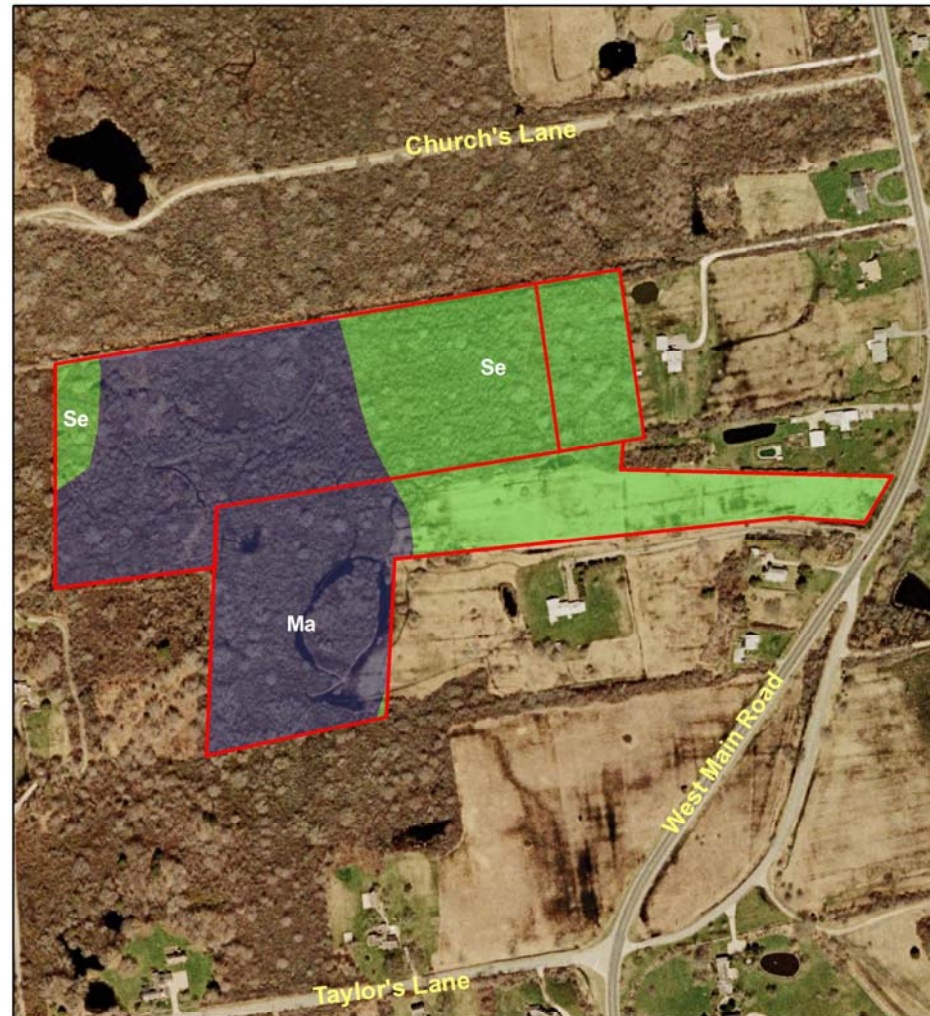
0 0.1 0.2 0.4 0.6 0.8  
Miles

Created by:  
Carol Lynn Trocki, 12/2007  
For the Sakonnet Preservation Association  
Datalayers: USGS 7.5 Minute Topological  
Quadrangle, Tiverton and Sakonnet Point  
Quads (from RIGIS).

# Soils Map

- soil types
- slope
- acreage
- drainage
- uses

Source: RI Soil Survey,  
NRCS Soil Maps



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For the Sakonnet Preservation Association  
Datalayers: 2003-2004 RIDOT 1:5,000  
scale digital true color orthophotographs,  
RISSURGO datalayer, USDA-NRCS, 1996  
(from RIGIS).



## **Conservation Values**

- Agricultural Resources
- Water Resources
- Wildlife Habitat / Conservation Resources
- Scenic, Recreation, and Other Resources



## Agricultural Resources

- Does the property contain Prime Farmland Soils or Soils of Statewide Importance?
- Does the property have a current or past agricultural use?
- Is the property suitable for agriculture and located near other agricultural properties?

List agricultural uses, crops, etc.





## Water Resources

- Does the property contain a river, stream, or other water body?
- Does the property fall within a public drinking watershed or other sensitive area?
- Does the property contain wetlands?

Describe drainage basin, distance from nearest water body, types of water courses (source and drainage information), wetland types.



## **Wildlife Habitat / Conservation Resources**

- Does the property contain any rare or endangered species, or species of particular management concern? (might it during another part of the year?)
- Does the property contain any rare or unusual habitats?

Provide representative list of plants and animals observed using the property, list of natural (or agricultural) community types, assessment of habitat connectivity, etc.

The following fauna and flora were observed on the Premises during a site visit on December 13, 2007:

## FAUNA

### ***Birds***

Blue Jay (*Cyanocitta cristata*)

Black-capped Chickadee (*Poecile atricapilla*)

Song Sparrow (*Melospiza melodia*)

White-throated Sparrow (*Zenotrichia albicollis*)

Northern Cardinal (*Cardinalis cardinalis*) – nest observed



### ***Mammals***

White-tailed Deer (*Odocoileus virginianus*) – by track

Coyote (*Canis latrans*) – by track

## FLORA

(Species recognized by the Rhode Island Invasive Species Council are shown in bold.)

American Holly (*Ilex opaca*)

**Asian Bittersweet (*Celastrus orbiculatus*)**

Aster (*Aster* spp.)

**Autumn Olive (*Elaeagnus umbellata*)**

Bluejoint Grass (*Calamagrostis canadensis*)

Buttonbush (*Cephalanthus occidentalis*)

Cat-tail (*Typha latifolia*)

Common Privet (*Ligustrum vulgare*)

Common Reed (*Phragmites australis*)

Dock (*Rumex* spp.)

Fox-Grape (*Vitis labrusca*)

Goldenrod (*Solidago* spp.)

Greenbrier (*Smilax rotundifolia*)

Highbush Blueberry (*Vaccinium corymboum*)

Ironwood (*Capinus caroliniana*)

**Japanese Honeysuckle (*Lonicera japonica*)**

Joe-Pye Weed (*Eupatorium dubium*)

*continued.....*





## **Scenic, Recreation, & Other Resources**

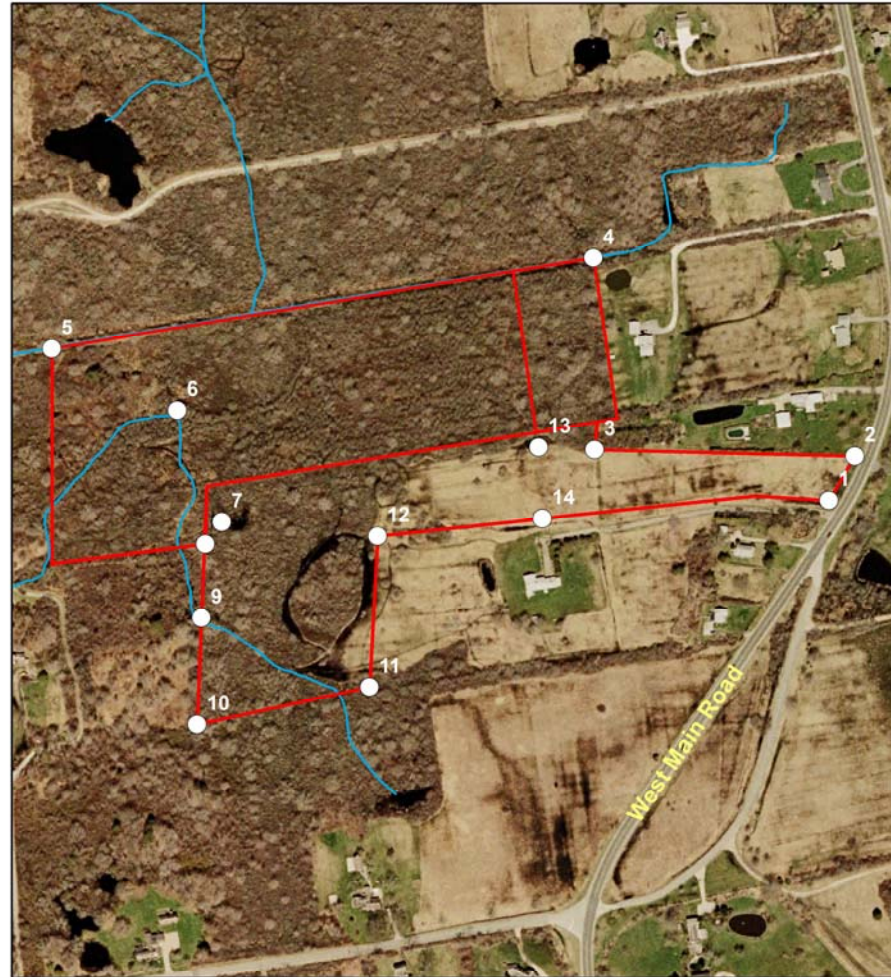
- Does the property fall within a scenic area? Are there scenic benefits available to the public (ie. public road or water frontage)?
- Does the property provide public recreation opportunities?
- Does the property contain stone walls, or other cultural or historic resources?
- Are there other valuable attributes not mentioned elsewhere?



## **What should be included in a BDR?**

- Documentation of all existing human made features
- Copy of municipal plat map showing the property
- Copy of engineering survey
- Photo documentation (description and photos)

# Photo Documentation Map



- Property**
- Conservation Area
- Photo Stations
- Perennial Streams



0 85 170 340 510 680 Feet

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## Photo Documentation



### Photo 1A

Looking WSW along the southern boundary of the Conservation Area, alongside the driveway from the entrance near West Main Road.

Photographed by Carol Lynn Trocki

12/13/07



## **BDR Best Practices**

- Create at least 3 original hard copies: 1 for landowner, 1 for files, 1 for archive (can also be publicly recorded with CE)
- Use digital storage for reference, stewardship, monitoring, etc.
- Use archival quality materials (film, ink, binding materials)
- Include statement of qualifications for BDR creator



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