

Anatomy of a Conservation Transaction



Trish Sylvester, Tiverton Land Trust
Bruce Payton, Gloucester Land Trust

Land & Water Summit 2012

WHY THE LAND TRUST PURCHASES PROPERTY

**TOWN of GLOCESTER
COMPREHENSIVE COMMUNITY PLAN
FIVE YEAR UPDATE 2008**



THE GLOCESTER VISION

"A guide to actions for sustained community development; for the community, the current and future residents and their families."

ORIGINAL PLAN ADOPTED

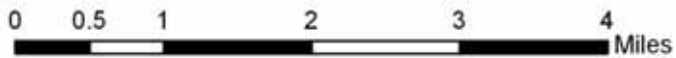
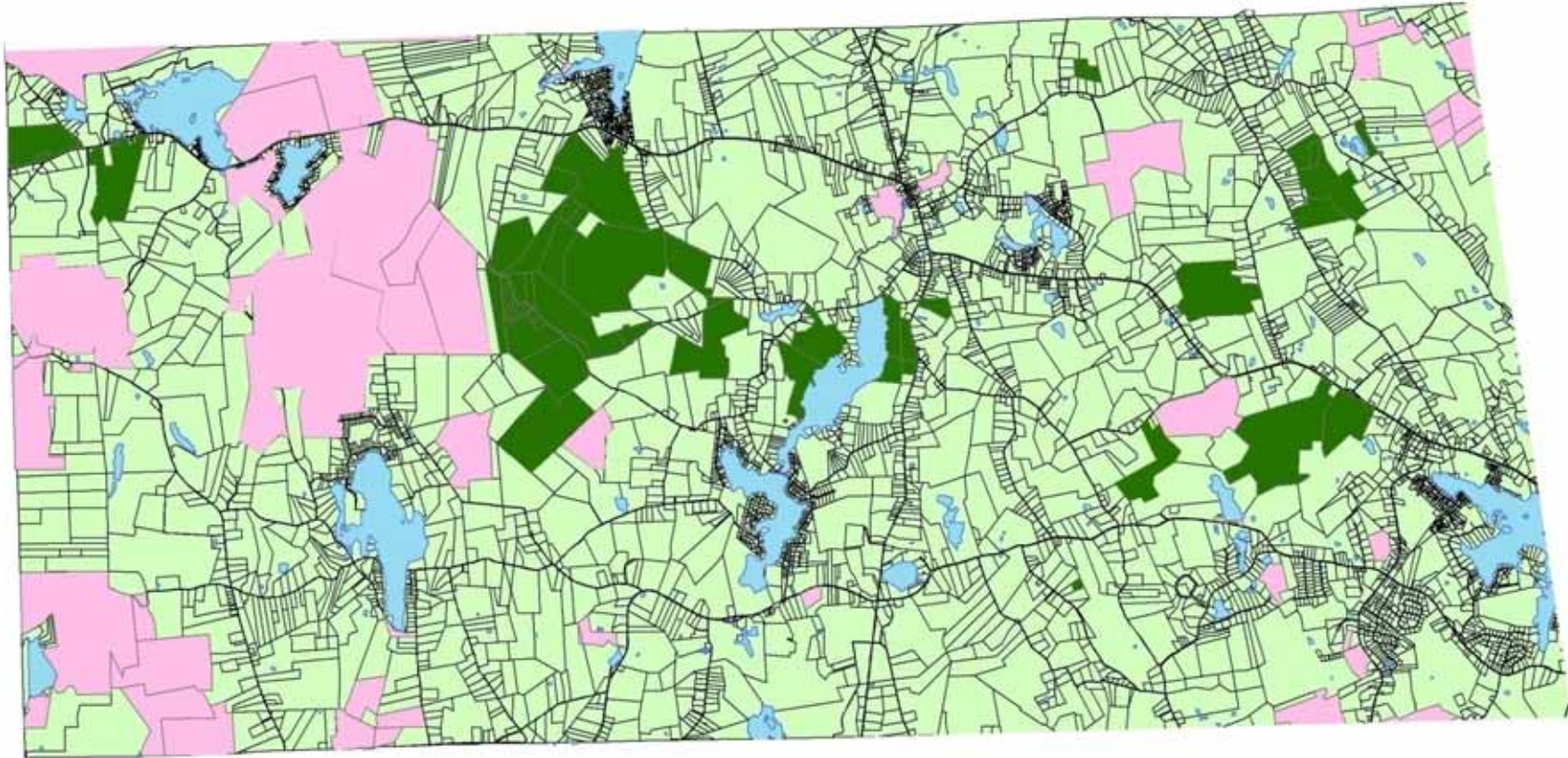
Planning Board - May 2, 1994

Town Council - June 16, 1994

First Five Year Plan Update Adopted - September 20, 2001

Second Five Year Plan Update Adopted - June 19, 2008

Does it fit ?







Where does this property fit into your overall plan?

- Do you have a greenway plan?
- Do you have a build out plan?
- Is it in the comprehensive plan?
- Is it consistent with your acquisition criteria?
- Why did you want this property?
- Is in a Priority Location?
- Is there a Public Benefit?

PROTECTION







WILDLIFE





PRESERVATION





AGRICULTURE





SIGNE PHILLIPS WOODLAND
GLOCESTER
TOWN
FOREST



GLOCESTER LAND TRUST

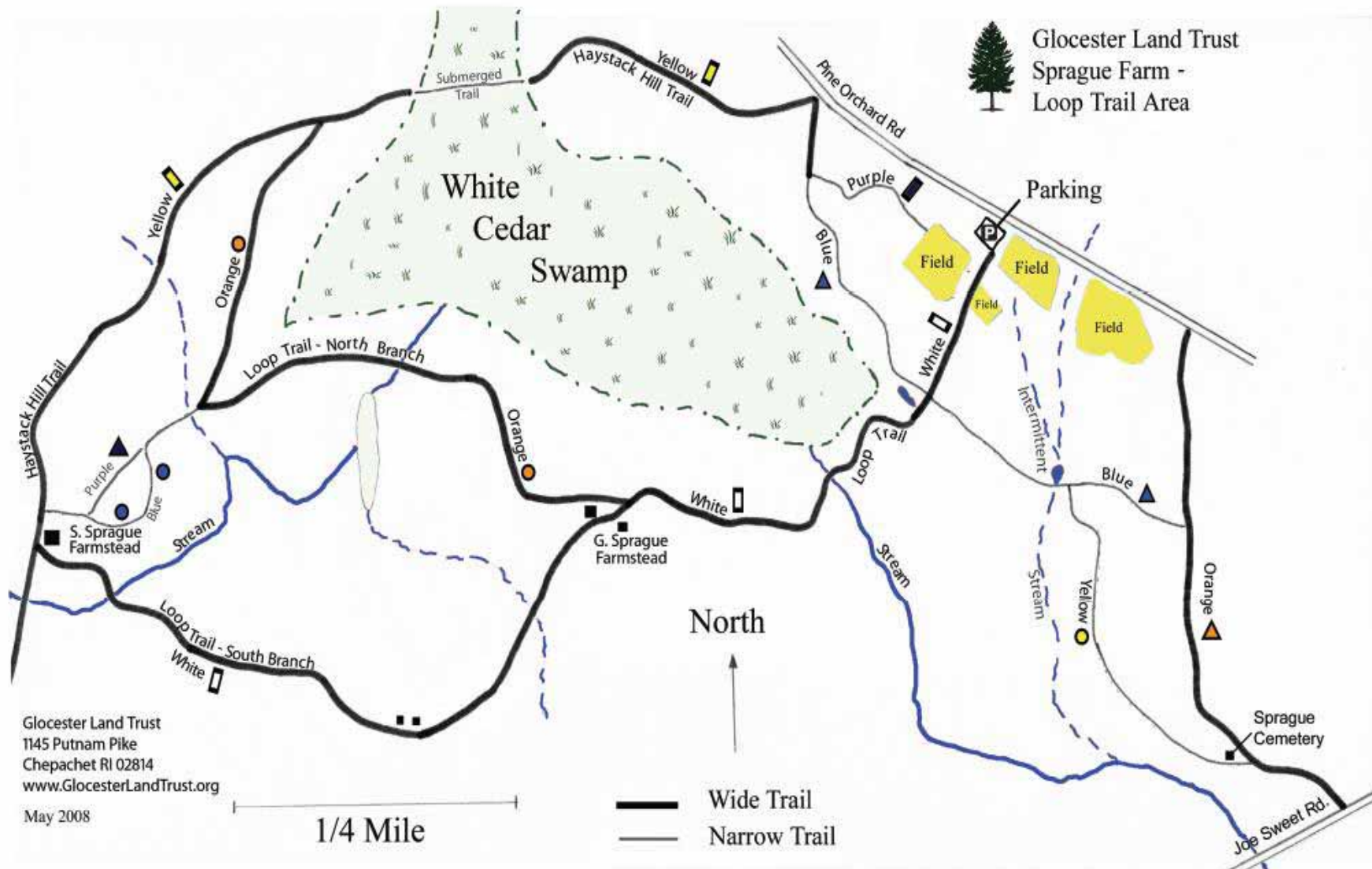
FOREST MANAGEMENT
DEMONSTRATION AREA





RECREATION





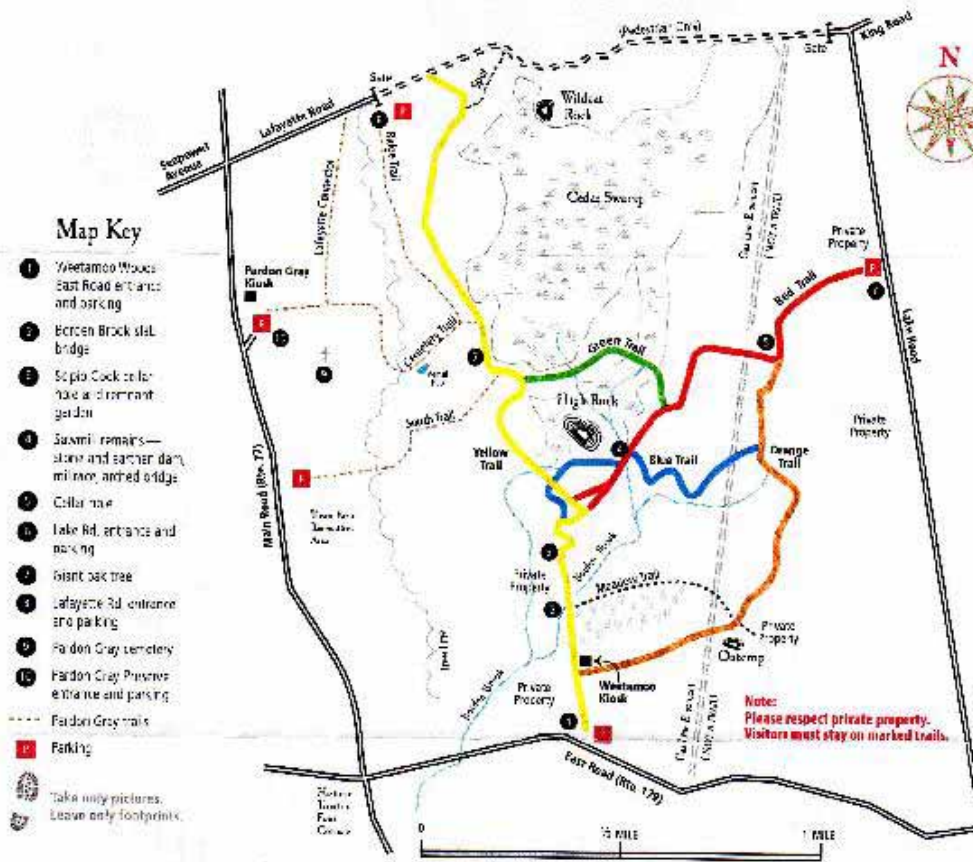
1/2 mile walk: Start on White Rectangle Loop Trail and turn right across field to Purple Rectangle trail and follow to end. Turn left onto Blue Triangle trail and follow to White Rectangle Loop Trail. Turn left and return to parking lot.

1 mile walk: Start on White Rectangle Loop Trail, turn left onto Blue Triangle trail and follow to end, turn right onto Orange Triangle trail. Just beyond cemetery, turn right onto Yellow Dot trail and follow to end. Turn left onto Blue Triangle trail and follow to White Rectangle Loop trail. Turn right and return to parking lot.

2 1/2 mile walk: Start on White Rectangle Loop Trail and follow the Loop Trail South Branch to end. Turn right onto Yellow Rectangle trail, turn right onto Orange Dot -- Loop Trail North Branch and follow to end. Turn left onto White Rectangle Loop Trail and return to parking lot.

TRAIL GUIDE

WEETAMOO WOODS & PARDON GRAY PRESERVE



Visitor Etiquette and Regulations

This area is maintained for the quiet enjoyment of the public. Please protect its natural and cultural environment. Town of Tiverton has 54 ordinances. Regulations for public users summarized here:

- Visiting is allowed between sunrise and sunset.
- Visitors must stay on marked trails.
- Dogs must be leashed or under positive control, and kept on marked trails.

- NO possession or consumption of alcohol.
- DO NOT leave trails or use unmarked trails.
- DO NOT remove or disturb vegetation, structures or any object intrinsic to the site, (e.g. stones, artifacts)
- NO littering, camping, smoking, hunting, trapping, paintballing, fires.
- NO motorized vehicles, such as ATVs and motorized trail bikes.



Directions

South Entrance on East Road, Tiverton RI: From Route 26 in Tiverton, take Route 77 (Main Road) south toward Little Compton. After 3.6 miles, and just beyond Lafayette Road, for the left) and Seapoint Avenue (on the right), Pardon Gray Preserve is on the left. Continue for two miles further south, turn left at the fork. Come onto East Road (Rte. 179). Proceed about 1 mile to the south entrance, Weetamoo Woods, on the left.

Town of Tiverton Street Department, www.tivertonri.org
The Tiverton LEGS Club, www.tivertonleghunters.com



HABITAT RESTORATION





SCENIC VISTA









How Does the Land Trust Acquire Property ?

- **Request by Landowner.**
- **Referral by Town, State, Nature Conservancy, Audubon, Farm Service Agency.**
- **High interest to Land Trust: in holding or abutting property.**
- **Donation**

How to Make that First Contact

- **Do you know anybody in the area that might know the person that owns the property you want?**
- **Do you have a common interest?**
- **Are they a member of any organization you are affiliated with?**
- **Find a common ground**

Preparation for Visit

- **Research**
 - **Find out as much as you can about the property**
 - **Locate any maps: GIS, Google Earth, old surveys, abutting property surveys, old appraisals, tax assessor**
 - **Bring a mutual friend, another member of the Land Trust, (Check with owner)**

The Visit

- **LISTEN, LISTEN, LISTEN**
 - Find out what the Landowner wants to do
 - Sell, donate, Conservation Easement, life tenancy
- **Doesn't fit help out anyway**
 - Suggest other alternatives, Farm, Forest, Open Space, other organizations
- **Remember:**
 - Be respectful
 - Be helpful
- **Tax Benefits:** But don't give legal or tax advice, leave that to the professionals.

The Follow up

- **Thank you note**
- **Write out visit summary**
- **Complete and File criteria scoring sheet and other information**
(years from it may come back)

Scoring criteria sheet

Land Acquisition

Draft – 11/24/11

Procedure

TIVERTON LAND TRUST

Property Evaluation Scoring Criteria

Methodology: Each property under consideration for protection by TLT is evaluated on the basis of 10 separate criteria, and receives a score of 1 to 10 for each separate criterion. Each property will therefore receive a total score of 1 to 100. Comparing scores facilitates comparison and prioritization of properties for acquisition purposes.

[Sources: Tiverton Land Trust Mission Statement, RINHPC Scoring Criteria for OpenSpace Grants, federal and state law]

Property: _____	<u>Score</u>
1. Acquisition of the property or a conservation easement over it will contribute to preserving the rural character and scenic beauty of Tiverton.	_____
2. The property is within a high-priority area or is contiguous or in proximity to property already under protection.	_____
3. Acquisition of the property or a conservation easement over it will protect significant wildlife habitats or natural resources.	_____
4. The seller is fully committed and strongly motivated to protect the property through a transaction with TLT.	_____
5. Stewardship responsibilities for the property are within current TLT capabilities or will be covered by additional available funding.	_____
6. The cost of the acquisition is reasonable, and TLT now has, or can reasonably obtain, the funds needed to acquire the property.	_____
7. There are other organizations or governmental entities willing and able to participate with TLT to fund the acquisition of the property.	_____
8. The property is under development pressure, and if not protected is likely to be lost as open space forever.	_____
9. The property will provide for or enhance opportunities for public recreation or education, or provide other public benefits.	_____
10. Protecting the property will preserve historic, geologic, archaeological, or other local features or landmarks.	_____
Property Evaluation Score: _____	

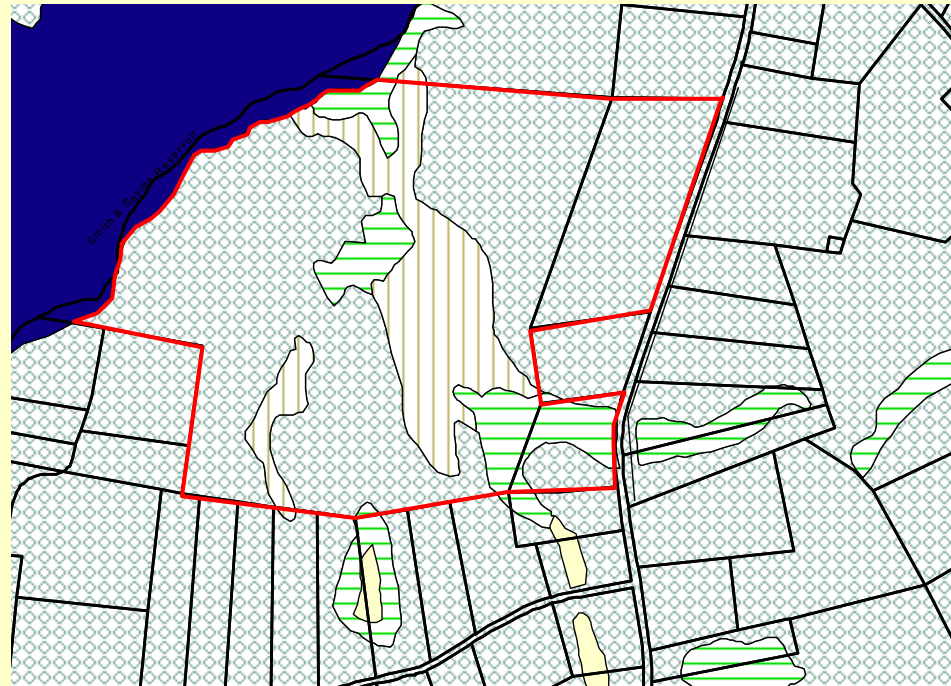
PROPERTY EVALUATION








- **Locate funding**
- **Write out how it fits to your plan**
- **How does it fit the Comprehensive Plan**
- **Development plans for property**
- **Prepare for presentation to Town Council or Land Trust Board**

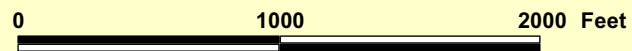
PROPERTY EVALUATION

- **Collect information**
 - **GIS Overlays**
 - **Ground Boundary Survey**
 - **Environmental Survey**
 - **Species Inventory**
 - **Specialized Survey (Forest Inventory)**

SUBJECT Property

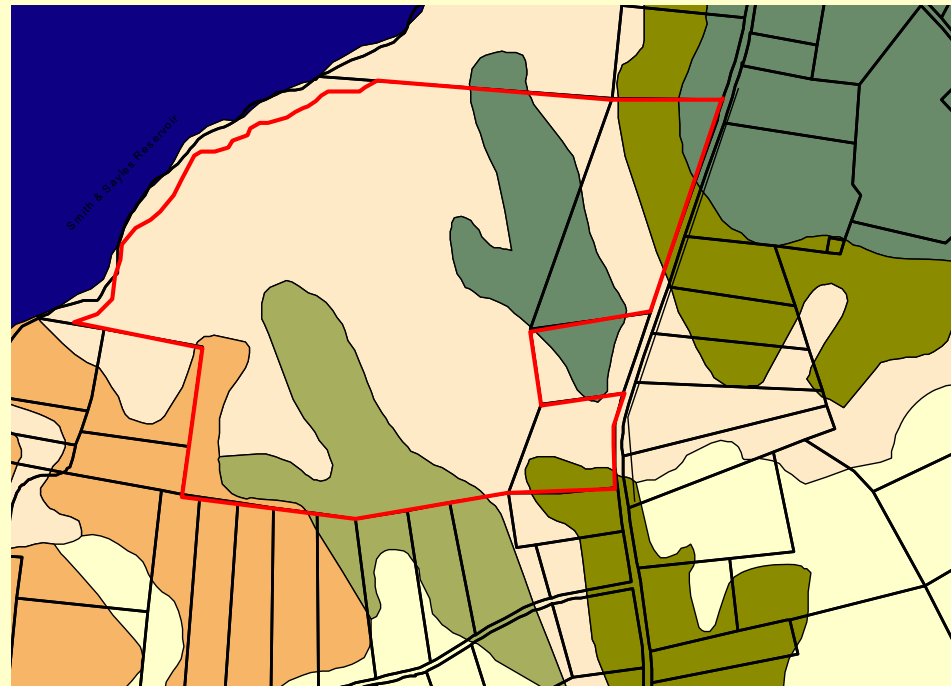










-  **Parcels.shp**
- Gl_wets.shp**
-  **Forested Wetland: Coniferous**
-  **Forested Wetland: Dead**
-  **Forested Wetland: Deciduous**
-  **Lacustrine Open Water**
-  **Upland**
-  **Subject Property**

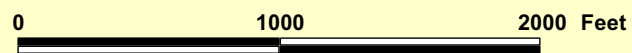


SUBJECT PROPERTY

Soils Map

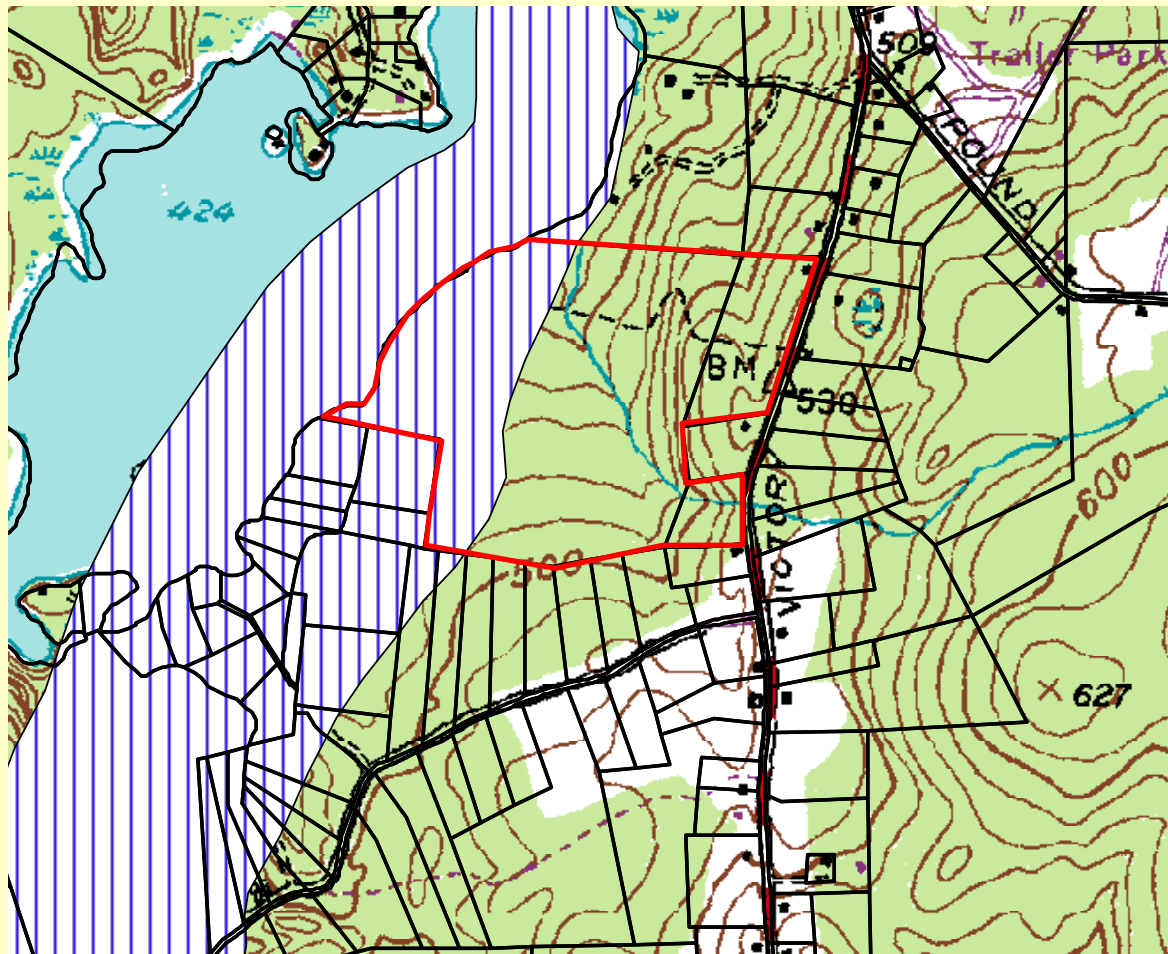


-  Parcels.shp
- Glsoi96.shp**
 -  MmB
 -  Nt
 -  PbB
 -  Rf
 -  W
 -  WoB
-  Subject Property



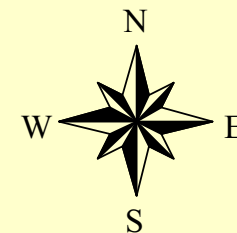
SUBJECT PROPERTY

Groundwater Reservoir



Legend

- Parcels2003.shp
- Gwreservoirs.shp
- UPPERBRANCH
- Subject Property





0 2000 4000 Feet

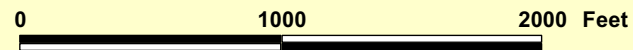
SUBJECT PROPERTY



Aerial Photo

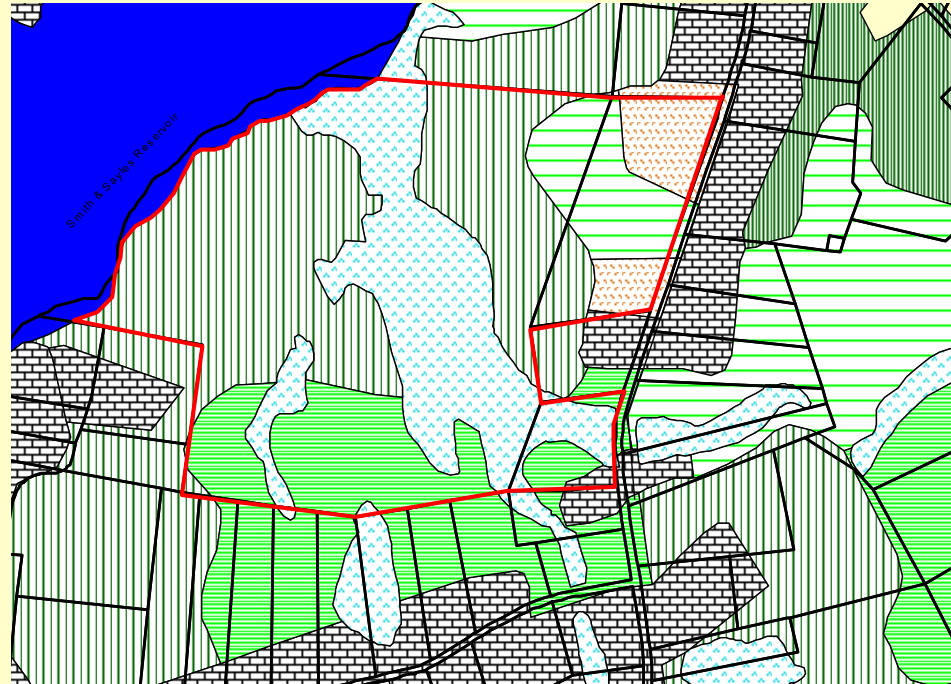












-  Parcels.shp
-  Subject Property

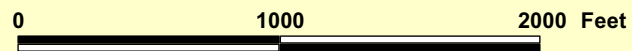


SUBJECT PROPERTY

Land Use Map



-  Parcels.shp
- GI_lulcs.shp**
-  Deciduous Forest (>80% hardwood)
-  Evergreen Forest (>80% softwood)
-  Medium Density Residential (1 to 1/4 acre lots)
-  Mixed Deciduous Forest (50 to 80% hardwood)
-  Mixed Evergreen Forest (50 to 80% softwood)
-  Pasture (agricultural not suitable for tillage)
-  Water
-  Wetland (not to be classified)
-  Subject Property





PURCHASE PROCESS

- **Obtain Appraisal**
 - Qualified Appraiser
 - Met Funders Standards
- **Negotiations with Landowner(s)**
 - More than one
 - Family
- **Purchase and Sales Agreement**
 - Includes contingences

MORE IN THE PURCHASE PROCESS

- **Environmental Assessment**
- **Property Survey (inspection of survey)**
- **Title search (insurance)**
- **Funding, Grant Application(s)**
- **Draft Conservation Easement**

The Closing

- **PAY OUT**
- **Have a celebration**
 - Check with the landowner
 - Media event
 - Award ceremony





08/24/2005

PROPERTY MANAGEMENT PLAN – SOME ESSENTIALS

- 1. General overview**
- 2. History of the site**
- 3. Site resources/conservation values**
- 4. Goals of the plan**
- 5. Management activities**
- 6. Plan for large scale stewardship projects**
- 7. Habitat inventory/Maps**

BASELINE DOCUMENTATION

- 1. General identifying information**
- 2. Photographs with accompanying numbered list, descriptions and map (usually a smaller copy of the survey)**
- 3. List of plants, wildlife, habitat (BIOBLITZ)**
- 4. Conservation values of the property**
- 5. Maps - aerial, soil, topographic**
- 6. List of special features (e.g., stone walls, vernal pools)**



POST CLOSING

- **DOCUMENT RECORDING**
 - **DEED**
 - **Maps**
- **Stewardship and Enforcement**
 - **Perpetuity / Permanence**
 - **Management plans: maintenance, resource mgt., safety, trespassing, ongoing expenses, tax forms, insurance, public access, etc.**
 - **Stewardship financing ?**
 - **Records Policy and Recordkeeping**
 - **Annual Monitoring (who and how?)**



PLEASE SIGN UP ON THE
SIGN IN SHEET AND WE
WILL SEND YOU HANDOUTS
AND OTHER REQUESTED
INFORMATION
ELECTRONICALLY
THANK YOU



CONTACT INFORMATION

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