

## **VES Land Trust Stewardship Records Management Policy**

The Virginia Eastern Shore Land Trust maintains all stewardship records in order to effectively monitor and enforce the terms of its conservation easements over time. This VES Land Trust records management policy reflects the regular course of business of the organization in preparing, recording, documenting and monitoring a conservation easement and activities on a protected property.

The VES Land Trust approach to preparing three critical sets of stewardship documents for each easement – Exhibit B/Map of the Protected Property, Baseline Report and annual Monitoring Report – reflects the Land Trust Alliance new Standards & Practices, revised in 2004.

At this time, VES Land Trust keeps original documents and permanent records in a fireproof and secure storage room within the building at 36076 Langford Highway, Belle Haven, VA, where it has offices. In time, the Land Trust may choose to move these records to an archival record storage facility.

### **Exhibit B/Map of the Protected Property**

The VES Land Trust starts with the most current aerial survey photographs available from the Virginia Geographic Information Network of the Virginia Information Technologies Agency to create Exhibit B, a map of the protected property. Using ArcView software and information from county tax maps, county topographic maps and actual inspection of the property, the Land Trust adds the following information to the aerial photograph:

- property boundaries
- 100-foot buffers on waterways, marsh and perennial streams and ditches
- roads, houses, docks and other structures
- historic resources, such as a cemetery
- natural features, such as migratory bird habitat or bald eagle nest sites
- any other unique features of the property subject to terms under the conservation easement
- any other unique restrictions within the conservation easement

Exhibit B is part of the conservation easement document signed by all parties to the easement – grantor and officers of the grantee and co-holder grantee – and is recorded in the appropriate county courthouse.

VES Land Trust keeps the original signed copy of the easement, with Exhibit B in print and digital form, in the secure storage area. Copies are maintained in the Land Trust office and provided to the easement grantor and the co-holder grantee.

### **Baseline Documentation Report**

VES Land Trust creates a Baseline Documentation Report before every conservation easement is recorded. It includes, but is not limited to the following information:

- Name & address of easement donor, grantee and co-holder grantee.
- Written description of the property, with directions

- Outline summarizing easement terms.
- County Comprehensive Plan designation and current zoning for property
- Historic district or agricultural/forestral district designation, if applicable
- County Chesapeake Bay Preservation area designation, if applicable
- Virginia Department of Transportation Six Year Plan for area around property
- Conservation Reserve Enhance Program buffer and plan, if applicable
- Environmental hazards assessment of the property.
- Historic resource information from Whitelaw, Virginia DHR or other sources
- Title search or other evidence of clear title to the property.
- Letter of intent to donate easement from property owner.
- Legal consent form signed by easement donor
- Copy of recorded easement
- Ten year Forest Management Plan (if applicable), approved and signed by easement co-holders.
- Aerial photos, topographic and other maps of the property from the United States Geological Survey, county government, state agencies or other sources showing:
  - property lines
  - contiguous or nearby protected areas
  - adjacent landowners
  - existing man-made improvements, including houses, farm buildings, roads, impoundments, docks, etc.
  - vegetation types
  - soil types
  - forested or vegetative buffers
  - required waterfront buffers
  - managed forest land
  - active pasture or crop land
  - distinct natural features, such as wetlands, ponds and waterways
  - historic resources
  - any other significant conservation values
  - land use history
  - sites for permitted new structures (if any)
  - permitted subdivision parcels (if any)
- On-site photographs taken at appropriate locations on the property, documenting conservation resources, existing structures and reserved sites for new structures, if any. A map of the property is created showing the photo checkpoints by specific Geographic Positioning System coordinates.

The Baseline Documentation Report is dated and signed by the easement donor and an officer of the VES Land Trust.

VES Land Trust keeps the original signed copy of the baseline report, in both print and digital form, in the secure storage area. Copies are maintained in the Land Trust office and provided to the easement grantor and the co-holder grantee.

## **Annual Monitoring Reports**

Each year, the VES Land Trust makes an appointment to visit each protected property, with or without the landowner, to review the condition of the property and ensure the easement terms are followed.

VES Land Trust staff complete a checklist regarding for the following changes to the property:

- Ownership
- New structures or residences
- New forestry or agricultural practices
- New roads, dikes, excavation
- Other man-made improvements
- Natural alterations of property (flooding, fire, insect infestation, waterways)
- Problems with adjacent property owners

New photographs are taken as needed to document changes to the property. When needed, or at least every five years, all of the photo checkpoints documented in the baseline are revisited and updated photos are taken.

Annual monitoring reports also contain any requests or approvals sought by the landowner in the previous year, such as for a permitted homesite or a forest management plan.

Each annual Monitoring Report is signed by VES Land Trust staff.

VES Land Trust keeps the original signed copy of the monitoring report, in both print and digital form, in the secure storage area. Copies are maintained in the Land Trust office and provided to the easement grantor and the co-holder grantee.

## **Storage Procedures**

All original print and digital copies of stewardship records are maintained in the secure storage area in perpetuity.

Additional copies are maintained in the VES Land Trust office files for day-to-day use and provided to the easement grantor and co-holder grantee.

Digital media will be recopied as needed to prevent degradation of digital material and whenever office computer systems are upgraded or replaced.

Currently, VES Land Trust maintains digital media on CD-Rom. Any conversion of digital media to new technology in the future will be documented fully to ensure the integrity of the original data.

*Approved by the VES Land Trust Board of Directors, \_\_\_\_\_, 2005.*

---

*Price Mears Clarke, Secretary*