

LOWER CONNECTICUT RIVER LAND TRUST  
POTENTIAL PRESERVE/EASEMENT EVALUATION TEMPLATE FORM

| <b>SITE VISIT CHECKLIST</b>   |   |  |                                    |
|---|---|--|------------------------------------|
| Property Location: _____  |   |  |                                    |
| Total acreage: _____  |   |  |                                    |
| Date of evaluation: _____   |   | Prepared by: _____   |                                    |
| Property owner: _____   |   | Assessors map: _____ Parcel: _____   |                                    |
| Recent boundary survey available?<br><input type="checkbox"/> Yes<br><input type="checkbox"/> No  | Boundaries marked?<br><input type="checkbox"/> Yes<br><input type="checkbox"/> No | Base map: _____  |                                    |
| Significant buffer value: _____   |   |  |                                    |
| Surrounding land uses: _____  |   |  |                                    |
| Watersheds in which the property is located:<br><i>See Addendum 1 for potential examples. This section should be unique to the particular land trust.</i> |   |  |                                    |
| Distance from major stream/water body/aquifer:<br>_____   | Contiguous to existing preserve parcels:<br>_____<br>_____<br>_____               | Acres in agricultural use:<br>_____  | Type of agricultural use:<br>_____ |
| Acres in forest land:<br>_____  | Acres in Marsh/Wetlands:<br>_____   | Critical/Threatened species:<br>_____<br>_____<br>_____<br>_____<br>_____<br>_____ |                                    |
| Wildlife habitat:<br>_____<br>_____<br>_____  | Fisheries habitat:<br>_____<br>_____<br>_____                                     | Flora of Concern/Invasive species:<br>_____<br>_____<br>_____                      |                                    |

**SITE VISIT CHECKLIST (continued)**

Any rights granted to someone else?  
 Yes  
 No  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Any surrounding land use issues?  
 Yes  
 No  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Any trespasses or vandalism?  
 Yes  
 No  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Items reviewed:

|   |   |
|---|---|
| <input type="checkbox"/> Topographical maps | <input type="checkbox"/> Wildlife Dept maps                 |
| <input type="checkbox"/> Parcel maps        | <input type="checkbox"/> Historic preservation designations |
| <input type="checkbox"/> Aerial photos      | <input type="checkbox"/> Scenic byway plans                 |
| <input type="checkbox"/> Soil surveys       | <input type="checkbox"/> Local zoning/land use info         |
|   | <input type="checkbox"/> Natural Diversity Data Base        |
|   | <input type="checkbox"/> Other _____                        |

Archaeological/Historic/Geologic Features: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Is the property consistent with the town's PoCD, State of CT PoCD, LCRCLT Matrix, or other 'green' plan?  
 Yes  
 No

If yes, provide details in the next question.

Any other pertinent information?  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
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**PUBLIC BENEFIT**

Development potential:

- Yes
- No

# of buildable lots: \_\_\_\_\_

Recreational potential for the neighborhood/town/region:

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Describe scenic views from the parcel:

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Are scenic views protected from public roadways, waterways or recreation areas?

- Yes
- No

Does the property provide connection to other open/protected lands?

- Yes
- No

Does the property provide a buffer or is close/contiguous to existing CE, park, preserve or other protected land?

- Yes
- No

Will the public access the property for education or will recreation be permitted?

- Yes
- No

Will the property offer significant relief from urban closeness and/or help define community form?

- Yes
- No

Describe other intangibles:

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**ENVIRONMENTAL SITE ASSESSMENT CHECKLIST**

**Previous Land Uses:**

- Residential
- Agricultural
- Gravel/Mining
- Commercial
- Dump/Landfill
- Timbering
- Industrial
- Other:  
\_\_\_\_\_

**Structures:**

- Wells
- Septic
- Underground Tanks
- Surface Tanks
- Drums
- Pipelines
- Other:  
\_\_\_\_\_

**Adjacent Land Uses:  
(One mile radius)**

- Residential
- Agricultural
- Gravel/Mining
- Commercial
- Dump/Landfill
- Timbering
- Industrial
- Other:  
\_\_\_\_\_

Describe visit to the property, identify others present, check and comment as appropriate.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Observations or evidence of contamination:**

- Surface staining
- Vegetation damage
- Oil sheen
- Prior spills/leaks

- Odors
- None
- Other:  
\_\_\_\_\_

**Records and Investigations:**

Prior environmental assessment or tests:

- Yes
- No
- Not applicable

Any governmental or regulatory investigation or inquiry:

- Yes
- No
- Not applicable

Comments: \_\_\_\_\_

Could adjacent properties be developed in a manner that would significantly diminish the conservation values of this property?

- Yes
- No

Comments: \_\_\_\_\_

**STEWARDSHIP ASSESSMENT**

Will the property be unusually difficult to manage/enforce? (for example, multiple owners, frequent incidents of destructive trespassing, fencing restrictions, irregular configuration, subject to pollution from adjacent lands)

- Yes
- No

If yes, explain:

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Is the property irreparably contaminated?

- Yes
- No

Is the property large enough to be significant for its purpose?

- Yes
- No

For a CE, does the landowner insist on provisions that would make it difficult to effectively steward the property while maintaining its conservation values?

- Yes
- No

Total stewardship funds required (estimate to cover this holding's one time up-front costs (through interest generated)

\$\_\_\_\_\_

Anticipated annual stewardship funding amount and sources

\$\_\_\_\_\_

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Are the boundaries adequately defined?

- Yes
- No

Are there any encumbrances or easements/rights of way?

- Yes
- No

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**REGULATORY CHECKLIST**

Review of Regulatory Agency Records

- Review additional agency records if there is an indication of any potential release of a contaminant at or near the project location. Identify any records checked and results. Attach materials if appropriate.
- Not applicable

Review of Outside Records which may indicate past land uses

- Review additional materials (title information, business licenses, insurance records, fire hazard maps, tank permits, etc.) if items checked above indicate a potential for contamination. Identify any records and results. Attach materials if appropriate.
- Not applicable

- Determine if the property meets the IRS Code's conservation purposes test for conservation easements intended to qualify for federal tax benefits (and in some cases state tax benefits), or to determine what public benefit will result if the land is acquired in fee. *At a minimum*, the site inspection must identify those conservation values that will determine if a property meets EHLT's Project Selection Criteria.
- Not applicable

**INTERNAL REVENUE CODE DEDUCTIBILITY CRITERIA FOR EASEMENTS**

- Not applicable

A charitable income tax deduction will be available only if the following Internal Revenue Code standards are fulfilled. Those standards require compliance with either #1 or #2 below **AND** #3. Indicate if preservation of this property would contribute to any of the following IRS standards. (For additional details, see EHLT's Project Selection Criteria For Conservation Easements and Conservation Property Acquisitions.)

1. SCENIC ENJOYMENT (Preservation of the property as open space is for the scenic enjoyment of the general public.)

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2. GOVERNMENTAL POLICY (Preservation of the property as open space is pursuant to a clearly delineated federal, state or local governmental conservation policy.)

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3. PUBLIC BENEFIT (Preservation will yield significant public benefit.)

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| <b>A.PRESERVATION ATTRIBUTES (0 thru +10 each; 10=high/1=low)</b>                    | <b>SCORE</b> |
|--|--------------|
| 1.Contiguous to existing preserved area(s)   |              |
| 2.Protects surface water/wetlands/watercourses/aquifers                              |              |
| 3.Protects critical/threatened species/natural communities                           |              |
| 4.Protects/assembles wildlife corridors/greenbelts                                   |              |
| 5.Preserves farmland   |              |
| 6.Preserves forest land  |              |
| 7.Protects cultural/archeological/historic sites                                     |              |
| 8.Preserves geological features/scenic views   |              |
| 9.Provides active and passive recreation   |              |
| 10.Prohibits development with potential adverse environmental impact                 |              |
| <b>A Score</b>   |              |
| <b>B.STEWARDSHIP and RISK ASSESSMENT ATTRIBUTES (0 thru -10 each; 10=high/1=low)</b> | <b>SCORE</b> |
| 1.Stream channel stability/instability   |              |
| 2.Significant (x%) invasive plants   |              |
| 3.Evidence of dumping, contamination, degradation, other environmental liabilities   |              |
| 4.Significant (x%)areas with steep slope   |              |
| 5.Presence of storage drums or tanks   |              |
| 6.Indication of hazardous materials  |              |
| 7.Presence of fill on property   |              |
| 8.Ethical or public image problems exist in association with project                 |              |
| 9.Amount of EHLT's stewardship effort is out of proportion to benefits to be gained  |              |
| 10.Any trespasses or vandalism   |              |
| <b>B Score</b>   |              |
| <b>Primary Watershed Score*</b>  |              |
| <b>TOTAL SCORE</b>   |              |

Assign a value for each attribute listed below.

\*Primary Watershed Score adds:

- 10 points for Priority #1
- 8 points for Priority #2
- 6 points for Priority #3
- 4 points for Priority #4
- 2 points for Priority #5

**RECOMMENDATION**

Land Acquisition Committee Recommendation regarding \_\_\_\_\_:

- Proceed with Fee purchase
- Proceed with Fee donation
- Proceed with Conservation Easement purchase
- Proceed with Conservation Easement donation
- Not recommended

Stewardship Assessment Summary:

Upfront Cost: \$ \_\_\_\_\_

Estimated Annual Cost: \$ \_\_\_\_\_

Financial Analysis

Estimated Cost of Land Acquisition: \$ \_\_\_\_\_

Payment Plan Options:

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Brief summary supporting recommendation or why not recommending:

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The Board’s Discretionary Role: All the preceding notwithstanding, the Board retains discretion over acquisition or disposition and will evaluate each project and proposal on its own merits after careful investigation of the property, its resources, and its public benefits.

Individuals completing the evaluation:

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Date: \_\_\_\_\_



## Addendum for Preserve/Easement Evaluation Template Form

### 1. Examples:

Watersheds in which property is located:

- (priority #1) –
- (priority #2) –
- (priority #3) –
- (priority #4) –
- (priority #5) –

#### **Goals and Purposes Checklist:**

- The property is located within **or adjacent to** \_\_\_\_\_.
- The protection of this property is consistent with Trust Plans
- The property is in a relatively undisturbed, natural, scenic or historic condition, has recreational or agricultural value, or is in active agricultural use.
- The property is of sufficient size that its conservation resources are likely to remain intact, even if adjacent properties are developed, or sufficient neighboring property is either already protected or to be included as to have the same result.
- Protection of this property aids sound use planning, promotes land conservation, and encourages careful stewardship of land and water resources.

#### **General Criteria**

Does the parcel meet one or more of the following general criteria?

- Preservation of natural resources in \_\_\_\_\_, including land, swamps, woodlands, opens spaces, and unique scenic natural or historical sites.
- Promotes scientific study of and education regarding natural resources.
- Preserves unique quality of the environment of the Town of \_\_\_\_\_.

#### **Scoring Options**

1. Assign scores to each question on the entire evaluation form and total them at the end.
2. Assign scores to each section and total them at the end.