



Baseline Documentation for OWEB-funded Conservation Easements

Oregon Watershed Enhancement Board
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OWEB requires grantees to submit a baseline documentation report (BDR) to OWEB for review and approval not less than 30 days prior to the release of OWEB funds for the purchase of a conservation easement.

A BDR records the condition of a conservation easement area's existing physical conditions, natural and human-made, at the time of the conservation easement acquisition. A BDR provides the baseline for measuring future changes in the easement area's conservation values and other features. Baseline documentation is also required by the IRS for tax-deductible donations of conservation easements.

The BDR must be referenced in the conservation easement. The reference must at a minimum include the date of the BDR and a description of its contents, an acknowledgment by the landowner and easement holder of the accuracy of the contents, and a statement that the BDR is on file with the landowner, easement holder, and OWEB.

The conservation easement must also include an exhibit signed by the landowner and easement holder that acknowledges and agrees that the BDR is an accurate representation of the easement property. For suggested text, refer to OWEB's *Conservation Easement Guide*, available online at: http://www.oregon.gov/OWEB/GRANTS/acquisition_grants.shtml or from OWEB staff.

The volume of information required in a BDR will vary depending on the terms of the conservation easement, the features of the easement area, and the conservation objectives for which OWEB has awarded funding. A BDR must include the items below, to be approvable by OWEB. There may be additional information necessary to meet Federal Treasury requirements. Check with the Land Trust Alliance for details: <http://www.landtrustalliance.org/>

I. General Contents

- Purpose of the conservation easement
- Date BDR was prepared
- Date of BDR site visit and photographs, if different than BDR preparation date
- BDR authorship and authorship qualifications
- Landowner contact information (name, address, phone numbers)
- Land manager contact information, if different than landowner
- Physical address of the property, including the county
- Directions to the property from the nearest town or major highway

II. Property Description

- Property acreage
- Conservation easement acreage, if the easement does not cover the entire property

- Township, Range, Section, tax lot numbers, and legal description for the property
- Township, Range, Section, tax lot numbers, and legal description for the conservation easement, if the easement does not cover the entire property
- Physical setting – a general description of the area surrounding the easement area, including adjacent land uses
- Historical ownership and use – a description of the history of the conservation easement area, including past land uses such as agriculture, forest management, wildlife management, and residential
- Present land use – a description of the conservation easement area’s current zoning and uses such as agriculture, forest management, wildlife management, and residential
- Existing development – a description of all human modifications in the conservation easement area, such as structures, roads, trails, ditches, fences, and utility lines
- Conservation values – the ecological features and conditions that will be protected by the conservation easement. OWEB priority ecological systems, plant communities, and species, and acreages if applicable, must be documented and consistent with those stated in the OWEB grant application and conservation easement
- Documentation of any observed threats to the conservation values, such as invasive species, evidence of trespass, and erosion

III. Maps and Photographs

- Photographs of features within the easement area, such as houses; barns; fences; roads; utility lines; trails; areas of potential restoration or future land use change (e.g., site of allowed future kiosk construction); threats or impacts present at the time of the BDR (e.g., an unauthorized trail used by trespassers or a dumping area); and priority ecological systems, plant communities, and other features identified as conservation values in the grant application and conservation easement. Photographs must be accompanied by GPS coordinates and directional notations
- An aerial-photo-based map of the easement area, depicting easement boundaries and easement features listed above, as applicable
- Map depicting the location of photo points established to document easement features
- Map of the conservation easement area in the context of the larger property, if the easement does not cover the entire property
- Map of easement zones or other easement areas with special allowances or restrictions, if applicable

IV. Acknowledgment of Condition

- Signed statement of landowner and preparer acceptance of the BDR. This statement should also be used as an exhibit to the conservation easement