

**GLOCESTER LAND TRUST**

**CONFIDENTIAL – FOR INTERNAL USE ONLY**

**DONATION OF PROPERTY IN FEE  
Project Planning Checklist**

**PROJECT NAME:**

**ACRES:**

**ROAD/LOCATION:**

**TOWN:**

**GRANTOR'S NAME:**

**ADDRESS:**

**(W) PHONE #: (    )**

**(H) PHONE #: (    )**

**E-MAIL:**

**FAX #:**

**CONTACTS: Specify role and Names/Addresses/Phone #/Fax #/E-Mail**

- **ATTORNEY** \_\_\_\_\_  
  –
- **APPRAISER** \_\_\_\_\_
- **SURVEYOR:** \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

NOTE: This form outlines the steps generally followed in completing a Gloucester Land Trust land project. All steps identified as required should be completed BEFORE the Land Trust accepts a donation of real property.

The form serves as both a tracking sheet for transaction planning and as a record of the history of the project.

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**Initial contact:** Landowner initial contact: Date: \_\_\_\_\_

- Site visit (required)  
By: \_\_\_\_\_ Date: \_\_\_\_\_
- Landowner meeting (required)  
By: \_\_\_\_\_ Date: \_\_\_\_\_
  - Landowner materials received:
    - Copy of deed/legal description
    - Copy of property tax statements (or obtain from assessor)
    - Copy of survey
- Introductory letter: GLT requirements (Class1 survey, pins). Date: \_\_\_\_\_
- Disclosure doc sent - landowner must arrange independent legal and tax advice. Date: \_\_\_\_\_
- Appraisal information for donors sent. Date: \_\_\_\_\_

**Conservation Values and Natural Resource Review:** (Appropriate materials copied or cited in file)

- State or federal designations (wild and scenic river, scenic by-way, trout stream, etc.) reviewed.  
Identify: \_\_\_\_\_
- Other natural resource inventory, materials or plans reviewed. Identify: \_\_\_\_\_
- Gloucester Town Character area
- Scenic enjoyment and character
- Relationship to other protected lands-identify: \_\_\_\_\_

Notes (describe natural resources, reference Property Selection Criteria):

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**Public Benefit/Public Policies:** (Appropriate materials copied or cited in file)

- Town planning/zoning materials reviewed
- State or federal statutes reviewed
- Other-identify: \_\_\_\_\_

Notes (describe public benefit):

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**Environment Review** (required):

- Environmental review completed

Notes (Describe format of review, person(s) completing review, and major findings):

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**Project materials** (required):

- Project summary prepared
- Project resolution prepared

**Pictures:** Taken by: \_\_\_\_\_ Date: \_\_\_\_\_

- Filed (project files, property report, communications)

**Survey:** Ordered \_\_\_\_\_ Received \_\_\_\_\_

**Boundary Pins:** Completed \_\_\_\_\_

- Maps:**
- Reference map
  - Topographic map
  - Aerial photograph map
  - Nearby Protected Properties
  - Other map (e.g., soils) \_\_\_\_\_

**Title work:** Ordered \_\_\_\_\_ Received \_\_\_\_\_

**Legal review -- including legal description, title, access, mineral rights, mortgage issues, easement**

- Completed \_\_\_\_\_. Comments:

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**Approvals:**

- Acquisitions Committee review completed \_\_\_\_\_
- Board Receipt of Summary and other documentation \_\_\_\_\_
- Board Approval: \_\_\_\_\_
- Resolution dated and filed in project file \_\_\_\_\_

**Stewardship Cost Estimate:**

Management Plan Preparation \_\_\_\_\_

Annual Monitoring \_\_\_\_\_/yr

Administration \_\_\_\_\_/yr

Special Start-up Costs (e.g. habitat restoration, creation of trails or infrastructure, special signage, site cleanup, outreach to neighbors and community, ecological/biological surveys, brochures/maps, fencing, etc.):

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Ongoing Management Costs (e.g., invasives control, trail maintenance, habitat maintenance, mowing, etc.):

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Risks/High-Cost Scenarios:

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Estimated Per-Annun Cost: \_\_\_\_\_  
Principal Needed to Generate Income \_\_\_\_\_  
Equal to Per-Annun Cost: \_\_\_\_\_

**Stewardship Assessment: \$** \_\_\_\_\_

- Pledge received \_\_\_\_\_ (\$ \_\_\_\_\_)
- Cash received: \_\_\_\_\_ (\$ \_\_\_\_\_)
- Acknowledgment/thank you letter sent
- Other source of stewardship funds:

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**Value: \$** \_\_\_\_\_

Source:

- Appraisal
- 8283
- Other-identify: \_\_\_\_\_

**Final deed:**

- Signed by the landowner

Project completed:

- File number assigned:

Sent for recording:

- Returned

Recording date:

Document number: Vol \_\_\_ Page \_\_\_

**Landowner thank you:**

- Letter from Chairman sent

**Property Management Plan**

- Completed
- Approved by Stewardship Committee
- Approved by GLT Board
- Copy sent to the landowner

**8283:**  8283 received \_\_\_\_\_  8283 returned \_\_\_\_\_

**Data Management:**

- Original deed documents stored off-site in fire-proof safe; copies of documents added to files and monitoring binders created; all documents scanned and stored electronically pursuant to GLT Records Policy.  
Date: \_\_\_\_\_