

# ° CONSERVATION PLANNING DATA SHEET

**Project/Property Name** \_\_\_\_\_

**OWNER** \_\_\_\_\_

**COUNTY** \_\_\_\_\_ **TOWN** \_\_\_\_\_ **U.S.G.S. QUAD** \_\_\_\_\_

**TOWN TAX MAP and LOT** \_\_\_\_\_ **CHART NO.** \_\_\_\_\_

**ECOLOGICAL CHARACTER OF COASTAL MAINE: Region** \_\_\_\_\_ **Map** \_\_\_\_\_

**GEOGRAPHIC/INTEREST AREA** \_\_\_\_\_

**LAND TO BE PROTECTED:** acres \_\_\_\_\_ shorefront feet \_\_\_\_\_ road frontage \_\_\_\_\_

general character \_\_\_\_\_

other \_\_\_\_\_

[ If a part of larger parcel, give details on larger parcel:

acres \_\_\_\_\_ shorefront feet \_\_\_\_\_ road frontage \_\_\_\_\_

general character \_\_\_\_\_

other \_\_\_\_\_ ]

**WHAT IS SPECIAL ABOUT THIS LAND THAT MERITS PRESERVATION?** \_\_\_\_\_

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

## **Key Contact People** (owner, attorney, planner, staff, etc.)

\_\_\_\_\_  
name/relationship

\_\_\_\_\_  
address

\_\_\_\_\_  
city/state/zip

\_\_\_\_\_  
phone/fax

\_\_\_\_\_  
e-mail

\_\_\_\_\_  
name/relationship

\_\_\_\_\_  
address

\_\_\_\_\_  
city/state/zip

\_\_\_\_\_

\_\_\_\_\_  
name/relationship

\_\_\_\_\_  
address

\_\_\_\_\_  
city/state/zip

\_\_\_\_\_  
phone/fax

\_\_\_\_\_  
e-mail

\_\_\_\_\_  
name/relationship

\_\_\_\_\_  
address

\_\_\_\_\_  
city/state/zip

\_\_\_\_\_

**Project/Property Name** \_\_\_\_\_

phone/fax \_\_\_\_\_

phone/fax \_\_\_\_\_

e-mail \_\_\_\_\_

e-mail \_\_\_\_\_

**Legal Information:** (add sheets if more space is needed)

**RECORD OWNERS:** (year round and seasonal info/dates)

\_\_\_\_\_  
Name as on deed

\_\_\_\_\_  
name as on deed

\_\_\_\_\_  
address

\_\_\_\_\_  
address

\_\_\_\_\_  
city/state/zip

\_\_\_\_\_  
city/state/zip

\_\_\_\_\_  
phone/fax

\_\_\_\_\_  
phone/fax

\_\_\_\_\_  
e-mail

\_\_\_\_\_  
e-mail

**TYPE OF OWNERSHIP** (tenants in common, joint tenant, corporate, trust, partnership, long term, family holding, developer, etc.) \_\_\_\_\_

**INTENDED FUTURE OWNERS** (buyers, family, associates - details) \_\_\_\_\_

**HOW PROPERTY WAS ACQUIRED** (probate docket, deeds, declarations of trust -- including names, dates, book and page numbers, locale) \_\_\_\_\_

**SOURCE FOR DESCRIPTION OF PROPERTY** (list deeds, line agreements, partition orders, surveys - if only a portion will be restricted, list source of description for entire property and tell plan for describing relevant portion, ie.) lots, survey, landmarks) \_\_\_\_\_

**CONTIGUOUS LAND OWNED BY FAMILY** (donor, spouse, brother, sister, ancestor, lineal descendent - inform appraiser for IRS "enhancement" computation) \_\_\_\_\_

**EXISTING ENCUMBRANCES** (mortgages, liens, public or private rights-of-way, power easements, deed restrictions, zoning, pending or threatened litigation, boundary issues) \_\_\_\_\_

**PRIMARY LANDOWNER MOTIVATION** \_\_\_\_\_

**Project/Property Name** \_\_\_\_\_

**TAX INCENTIVES DESIRED:** income tax deduction? \_\_\_\_\_ estate/gift tax relief? \_\_\_\_\_ property tax relief? \_\_\_\_\_

**Project/Property Name** \_\_\_\_\_

**Baseline Information, Existing Character and Condition of Land to Be Protected By Easement:** (Specify where information relates to owner's entire parcel and to portion to be protected if they are not the same, add, and refer to more pages if space insufficient.)

**GENERAL BASELINE INFORMATION:**

**PRIMARY CURRENT USE OF LAND** \_\_\_\_\_

**SECONDARY USES** \_\_\_\_\_

**INTENDED USES PENDING EASEMENT, SUBDIVISION APPROVALS, TRANSFERS** \_\_\_\_\_

**EXISTING PUBLIC USES** \_\_\_\_\_

**EXISTING LIMITATIONS ON USE** (intrinsic, zoning, covenants, current use classification) \_\_\_\_\_

**SPECIAL CLASSIFICATIONS, RECOGNITION** (site specific and/or feature specific governmental/scholarly recognition of land/history/ecological features, [attach reports, statutes].) \_\_\_\_\_

**NEIGHBORING LAND/INFLUENCES** (any information on nearby land use, population density, aesthetic character, zoning, public or private land conservation, development trends, public use, proximate public vantage points, disputes, etc.) \_\_\_\_\_

**FAMILY INFLUENCES** (involvement of non-owners with concern for land, cooperative or otherwise) \_\_\_\_\_

**OTHER IMPORTANT GENERAL INFORMATION** \_\_\_\_\_

**Project/Property Name** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Project/Property Name** \_\_\_\_\_

**SPECIFIC BASELINE INFORMATION:**

**TERRAIN** (include description of elevations, views from land, water bodies large and small, wetlands, character of shoreline, geology, important features) \_\_\_\_\_

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

**EXISTING CHARACTER OF FLORA AND FAUNA** (include habitat information, animal/plant communities, rare species, vegetation cover, agricultural and forestry practices/plans/history, extent of clearing and vegetative screening, location, aesthetic character) \_\_\_\_\_

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

**EXISTING SURFACE ALTERATIONS** (include size, location, and uses)

roads/trails: \_\_\_\_\_

cultivation: \_\_\_\_\_

archeological sites: \_\_\_\_\_

ponds/wells/springs: \_\_\_\_\_

gravel pits/ mines: \_\_\_\_\_

subsurface utilities/septic: \_\_\_\_\_

soil test pits: \_\_\_\_\_

waste disposal: \_\_\_\_\_

other: \_\_\_\_\_

Sketch or Attach Map of Vegetation Types & Surface Alterations:

**Project/Property Name** \_\_\_\_\_

**EXISTING STRUCTURES** (*INCLUDE size, visibility, setback, location*)

residences: \_\_\_\_\_

accessory structures: \_\_\_\_\_

commercial buildings: \_\_\_\_\_

docks/floats/piers: \_\_\_\_\_

walls, fences: \_\_\_\_\_

seasonal storage: \_\_\_\_\_

bridges, stairs, boardwalks: \_\_\_\_\_

utility apparatus: \_\_\_\_\_

recreational facilities: \_\_\_\_\_

aquaculture facilities: \_\_\_\_\_

junk/refuse: \_\_\_\_\_

other: \_\_\_\_\_

Sketch or attach drawings for clarity:

**Project/Property Name** \_\_\_\_\_

**The Conservation Plan/Proposed Restrictions/Reserved Rights**

**CONSERVATION PURPOSE:** What is important to preserve? (refer back to cover sheet and limit the actual plan to restrictions that actually further conservation purposes, deferring any private purposes or wishes to private legal or informal mechanisms.)

**PRIMARY CONSERVATION PURPOSE** (refer to IRS tests: habitat protection, public recreation, open space/scenic, and historic preservation, but specify important features) \_\_\_\_\_

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

**SECONDARY** \_\_\_\_\_

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

**COMPETING CONSERVATION VALUES? METHODS TO RECONCILE THESE?** \_\_\_\_\_

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

**WHAT SORT OF USES WOULD THREATEN VALUES?** \_\_\_\_\_

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

**COMPETING USES OWNER DESIRES** \_\_\_\_\_

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

**CAN THESE BE LIMITED TO BE MADE COMPATIBLE? HOW?** \_\_\_\_\_

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

**IF SCENIC PRESERVATION, WHO SEES LAND? FROM WHERE?** \_\_\_\_\_

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



**Project/Property Name** \_\_\_\_\_

\_\_\_\_\_

**Land**

**Use Areas/Specific Restrictions and Reserved Rights**

**PROTECTED LAND** (Should entire parcel, or only a portion be included in easement? Should easement cover land intended for development? Describe areas, survey needed) \_\_\_\_\_

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

**LAND USE ZONES** (If included in easement, should development be limited to particular locations, specify why and where - natural areas, exclusionary zones, buffers, setbacks, development areas, building envelopes - strive for least complex arrangement) \_\_\_\_\_

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

**PUBLIC ACCESS AREAS** (All, part or none of land, means of access, specific limits on, specific allowances) \_\_\_\_\_

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

**SUBDIVISION** (permitted/prohibited/limited? prescribe extent) \_\_\_\_\_

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

(May land be used to permit increased density on abutting unrestricted land?) \_\_\_\_\_

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

**SPECIAL PROTECTION AREAS** (ie; rare species habitat, buffers, other) \_\_\_\_\_

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

**Project/Property Name** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Project/Property Name** \_\_\_\_\_

**Specific Restrictions/Reservations**

**VEGETATION MANAGEMENT** (specify goals and address any necessary rights and limitation, for instance...)

general prohibition of cutting of standing timber/or alteration of vegetation? \_\_\_\_\_

exceptions and reserved rights: prevention of fire/disease/exotics, emergency, holder approvals? \_\_\_\_\_

vegetative screening of permitted structures? \_\_\_\_\_

personal firewood/building materials, methods and location limits? \_\_\_\_\_

commercial timber harvesting? \_\_\_\_\_

forestry plan, standards? \_\_\_\_\_

need for holder approval? \_\_\_\_\_

location limits? \_\_\_\_\_

clear-cutting/selective harvesting, definitions \_\_\_\_\_

commercial/personal agriculture, limits, methods \_\_\_\_\_

creation of views from permitted structures/from public vantage points/from neighboring lands, cleared or selective cuts \_\_\_\_\_

planting/landscaping/harvesting vegetation \_\_\_\_\_

maintenance of existing clearings \_\_\_\_\_

creation of additional clearings, size/location/screening limits \_\_\_\_\_

clearing for yards/lawns, size/location/screening limits \_\_\_\_\_

clearing for roads, trails, permitted structures, setback/ screening limits \_\_\_\_\_  
boundary maintenance \_\_\_\_\_

**Project/Property Name** \_\_\_\_\_

\_\_\_\_\_

other \_\_\_\_\_

\_\_\_\_\_

**Project/Property Name** \_\_\_\_\_

**SURFACE ALTERATIONS** (specify intended uses, limitations)

General prohibition on all surface alterations, excavation, filling, wetland alteration, surface mining \_\_\_\_\_

Exceptions to no surface alterations, and reserved rights, as necessary for:  
permitted structures/ vegetation management \_\_\_\_\_

roads, trails, size/location/setback/paving limits \_\_\_\_\_

cultivation of household gardens \_\_\_\_\_

agricultural cultivation, limits \_\_\_\_\_

archeological \_\_\_\_\_

ponds/wells/springs, limits \_\_\_\_\_

shellfish harvesting \_\_\_\_\_

other \_\_\_\_\_

gravel for roadbuilding, restoration \_\_\_\_\_

**PERMITTED STRUCTURES** (specify intended structures/limitations)

General prohibition on all structures, temporary, permanent, meaning any man made object, not just buildings, with exceptions listed \_\_\_\_\_

Is the land divided into development and natural areas? (Describe here and show on Sketch map and specify information below for each area) \_\_\_\_\_

**Project/Property Name** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Exceptions to prohibition on Structures, and Reserved rights:  
If the easement, or a portion of it will generally prohibit building altogether, can there be signs? fences? boundary markers? outdoor furniture? walkways? culverts? hunting blinds? interpretive signs? outhouses? stairs? boardwalks? wells? septic systems? utility structures? any items to serve owner's other land? other? Specify materials or visibility limitations? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If there are existing structures, may they be maintained, replaced, increased in size, moved to other locations, altered significantly? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

converted into residences? \_\_\_\_\_

\_\_\_\_\_

Limitations on size, height, location, setback, screening, number, designs, visibility? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If there are existing structures or if residences may be built, are additional structures accessory to principal structures permitted; ie; sheds, outbuildings, garages, well-houses, garden furniture, fences, utility, septic, freshwater supply? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

guesthouses? \_\_\_\_\_

\_\_\_\_\_

bunkhouses, tents, trailers? \_\_\_\_\_

\_\_\_\_\_

Limitations on size, height, location, setback, screening, numbers, visibility? \_\_\_\_\_

\_\_\_\_\_

What agricultural/silvicultural/other business structures are permitted? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Limitations on size, height, location, setback, screening, numbers, visibility, other? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Project/Property Name** \_\_\_\_\_

Are additional residences permitted? \_\_\_\_\_

Limitation on numbers, type, permitted and prohibited locations, size, height, screening, visibility, setbacks, other? \_

Are there any other special sorts of structures that should be mentioned as either specifically permitted, prohibited, limited in some way, or as an exception to a general limitation, for instance, docks, tent platforms, boathouses, bunkhouses? \_\_\_\_\_

**SPECIFIC PROHIBITIONS** (things that are worth mentioning, even though the general restrictions would imply that they are prohibited, specify if limits such as setback, screening, siting, will be allowed.)

- bridges or causeways? \_\_\_\_\_
- towers, antennae, satellite dishes? \_\_\_\_\_
- hotels, motels? \_\_\_\_\_
- inns, bed & breakfasts? \_\_\_\_\_
- waste disposal sites? \_\_\_\_\_
- junkyards? \_\_\_\_\_
- apartment buildings, multifamily units? \_\_\_\_\_
  
- campgrounds? \_\_\_\_\_
- condo, timeshares? \_\_\_\_\_
- trailer parks? \_\_\_\_\_
- others? \_\_\_\_\_

**Project/Property Name** \_\_\_\_\_

\_\_\_\_\_

**Project History** Date Initiated \_\_\_\_\_ By whom/why? \_\_\_\_\_

\_\_\_\_\_

Project Goals \_\_\_\_\_

\_\_\_\_\_

Initial staff visit \_\_\_\_\_ Details \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

DATE                      ACTION

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Community sentiment? \_\_\_\_\_

Contribution to Stewardship? \_\_\_\_\_

Holder? \_\_\_\_\_

Survey needed/done? \_\_\_\_\_

Baseline Data compiled? \_\_\_\_\_

Baseline Data certified? \_\_\_\_\_

Subordination/consent? \_\_\_\_\_

Right-of-way needed to access protected portion of owner's land? \_\_\_\_\_

IRS Form 8283 discussed w/accountant? \_\_\_\_\_

Appraisal? \_\_\_\_\_

Other? \_\_\_\_\_

\_\_\_\_\_



**Project/Property Name** \_\_\_\_\_

**Sketch Map** (This should ideally be two maps, one showing the geographic location in the larger context, and another showing the approximate boundaries of the owner's entire parcel, the area to be restricted, and important information which will vary depending on the purpose of the easement, (for instance: existing roads and trails, existing buildings, surface alterations, cultivated areas, cleared areas, vegetation notations, slope and elevation info, height of tree canopy in places, wetlands, special habitat features, public access areas, nearby public vantage points, etc.)

---

° This material is designed to provide accurate, authoritative information in regard to the subject matter covered. It is provided with the understanding that the Land Trust Alliance is not engaged in rendering legal, accounting, or other professional counsel. If legal advice or other expert assistance is required, the services of competent professionals should be sought.