

Stewardship Records Management Policy – Appalachian Trail Conservancy

The Appalachian Trail Conservancy maintains all stewardship records in order to effectively monitor and enforce the terms of its conservation easements over time. This ATC 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 ATC approach to preparing three critical sets of stewardship documents for each easement – the Map of the Protected Property, Baseline Report and annual Monitoring Report – reflects the Land Trust Alliance new Standards & Practices, revised in 2004.

ATC keeps original documents and permanent records in fireproof and secure storage.

Map of the Protected Property

ATC uses the most current aerial survey photographs or USGS topographic maps available to create a Map of the Protected Property. Using appropriate software and information from relevant sources such as tax maps, topographic maps and actual inspection of the property, relevant features to be monitored are overlaid on the aerial photograph or topographic map. Further guidelines and technical specifications about the mapping process are included in the Baseline Report Specifications document.

The Map of the Protected Property is part of the conservation easement document signed by all parties to the easement – the donor and officers of ATC – and is recorded appropriately.

ATC will keep the original signed copy of the easement as well as the map of the property in print and digital form, in fireproof and secure storage. For more information on the treatment of records, see the Stewardship Records Management Procedure.

Baseline Documentation Report

ATC creates a Baseline Documentation Report before every conservation easement is recorded. See the Baseline Report Specifications document for a list of the information required.

ATC will keep the original signed copy of the baseline report, in both print and digital form, in fireproof and secure storage. At a minimum, copies must be available to the easement donor and to the easement monitor. For further detail see the Stewardship Records Management Procedure.

Annual Monitoring Reports

ATC will send a representative yearly to visit each protected property, preferably with the landowner, to review the condition of the property and ensure the

easement terms are followed. Documentation of such visits includes updated photographs and photo checkpoints. 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. The monitoring guidelines and forms are described in the Stewardship Records Management Procedure.

ATC will keep the original signed copy of the monitoring report, in both print and digital form, in fireproof secure storage. A copy must be provided to the easement donor.

Ad hoc Monitoring Visits

In the event where ATC learns of new activities on the property, whether it be possible violations, the exercise of retained rights by the land owner, or any other activity of note, ATC will conduct the appropriate verifications and site visits in accordance with any easement provisions applicable (i.e. notification of the land owner), in addition to any previous or planned annual monitoring visit. ATC will thus document and record all notable activities as they occur. ATC will treat such documentation similarly to the annual monitoring reports.

Enacted on _____, 2006, by the authority of David N. Startzell,
Executive Director of the Appalachian Trail Conservancy.

David N. Startzell, Executive Director