I. Purpose

This policy is intended to expand on and supplement the Land and Easement Acquisition Policy of the Greene Land Trust (GLT). It defines the uniform process to evaluate any properties offered, or considered for easement or acquisition in fee.

II. Policy Overview

All properties will be evaluated in a consistent manner using the process and criteria set forth in this policy. Properties may be nominated for consideration by property owners, Board of Directors, Staff and other groups or agencies.

For each project/property to be considered documents described below will be prepared including at least a Property Acquisition Checklist, Property Evaluation Worksheet and Acquisition Approval Resolution described in this policy. Each project will have a specific Project Plan. In many cases the Property Evaluation Worksheet will serve as the Project Plan.

The criteria defined below are used to assure that every land transaction is consistent with the GLT mission, goals and priorities and that there is a clear conservation purpose and public benefit of each transaction. These criteria will include consideration of Water and Land Resources, Habitat Resources, Open Space and Public Access, Aesthetic and Cultural Resources and Institutional Factors. These criteria are detailed below and in Table 1.

II. Property Evaluation Documents

The GLT will use a Property Acquisition Checklist to assure that all necessary steps are completed, that the project meets legal requirements and that all of the policy requirements defined below are addressed. The Executive Director has the authority to design and modify the Property Acquisition Checklist form as necessary. The Executive Director should keep the board informed of significant changes.

The GLT will use a Property Evaluation Worksheet (PEW) to collect, organize and summarize information about each property to provide information for informed decision making. The Executive Director has the authority to design and modify the PEW form as necessary. The Executive Director should keep the board informed of significant changes.

The GLT will have an individual Project Plan for each land project to assure that the property’s important conservation values are identified and protected and that the project furthers the GLT’s mission and goals. The Project Plan documents the intended purposes of each transaction, the intended uses of the property and the roles, rights and responsibilities of all parties involved in the acquisition and future management of the land or easement. The plan also explains the capacity of the GLT to meet future stewardship obligations. In many cases the completed Project Evaluation Worksheet will be sufficient to serve as a Project Plan. However,
translating the PEW information into an appropriate narrative is preferable and may be necessary for more unusual, complex or potentially controversial projects.

Each property transaction will be approved by the Board of Directors using an Acquisition Approval Resolution. A standard Acquisition Approval resolution will be prepared by the Executive Director and approved by the board. The Executive Director or board member will prepare an Acquisition Approval Resolution for each property action and will identify to the board any ways in which it is different from the approved standard resolution.

III. Property Evaluation Process

The Trust will use a uniform process to evaluate any properties offered, or considered for acquisition. Properties may be nominated for consideration by property owners, Board of Directors, Staff and other groups or agencies. All nominated properties will be evaluated in a consistent manner using the process and criteria set forth in this policy. The evaluation process will proceed using the following steps:

a. Property Nomination: Prior to formal consideration of any property, the Property Owner shall submit a formal request to the Trust for an evaluation of the property and its suitability for acquisition or easement at which time the Trust may ask for an evaluation fee. The Property Owner shall submit a written application, which will include a completed Part 1 of the Property Evaluation Worksheet (PEW), as well a cover letter. The cover letter should detail the Property Owner’s interest in offering their property for consideration, as well as clearly state the owner’s permission for Trust staff and Directors to visit the property for data collection.

Under certain circumstances, the Trust may find it necessary to evaluate properties prior to notification of the Property Owner(s). Pre-notification evaluations may be appropriate when conducting a general assessment of acquisition priorities, or when it is reasonable to suspect that advance knowledge of the Trust’s interest may negatively affect the price, or other conditions of a potential acquisition. Property evaluations without direct Landowner knowledge will be limited to that information which is publicly available (i.e. maps, reports etc). Any site visits to gather data must be done with the clear consent of the Property Owner.

b. Property Evaluation Worksheet: Upon submission of an application by a Property Owner, the Trust shall complete a minimum of two (2) Property Evaluation Worksheets (PEW). The initial PEW will be completed by staff (or a qualified project leader) who will also secure any supplemental information such as maps, aerials, photos, deeds etc. as may be needed to undertake a comprehensive review of the property. A member of the Board of Directors will independently complete parts 4, 5 and 6 of a second PEW. The member of the board will conduct a site visit that may be done concurrently with staff or qualified project leader.

c. Board of Directors Review: Prior to the Trust’s action on a nominated property, a minimum of one (1) Director of the Trust will conduct a detailed review of the completed PEWs. Nominated properties will be presented at a meeting of the Board of Directors, and will typically be tabled for further consideration at the next meeting of the Board.
d. Board of Directors Action: In the final step in the process, the Trust’s Board of Directors will review and weigh the property’s status based on the evaluation criteria, feasibility review and other information in the PEW. The Board may:

1. Table consideration of the Property for a period of time to allow for additional information to be obtained, when such information may be critical in making a final decision on a property. Motions to table consideration should set a specific period for the review, and provide staff direction on the additional information required.

2. Decline interest in an acquisition based on the property’s consistency with the evaluation criteria or feasibility assessment.

3. Determine that acquisition is favorable, and proceed to negotiating terms as set forth in the Trust’s policies and procedures.

IV. Evaluation Criteria

When considering property for acquisition, the Trust will evaluate each site in the context of five (5) primary criteria areas. These criteria represent broad areas of interests, and may have numerous factors or issues that would be considered. On the PEW each criterion will be summarized in the space allocated, with site reviewers summarizing the 3-5 most significant features of the property in each primary criterion. Examples of issues which may be factored into the evaluation under each of the primary criteria are provided in Table 1.

a. Water and Land Resources - Each property will be evaluated for its significance related to water and land resources. Combined with Habitat Resources this represents an evaluation of the property’s environmental or ecological factors. This includes factors such as the presence or absence of water bodies (lake, rivers, streams and ponds).

b. Habitat Resources – Properties will be evaluated for factors related to habitat resources. The Trust will evaluate the habitat features of the property in relation to local, regional, state or federal priorities for habitat protection. For example, the NY Natural Heritage Program should be consulted to determine if any rare, endangered, threatened or species of state concern are likely to be utilizing the habitat present. In Greene County, grassland species such as the Northern Harrier Hawk and Upland Sandpipers have been identified as priority species of concern and are the focus of significant habitat protection efforts. Habitat should be evaluated based on type, size, distribution, role in providing corridors etc.

c. Open Space and Public Access – Properties will be evaluated for the potential to provide open space or public access opportunities. This criteria assesses the property’s ability to provide access to unique resources (i.e. the Hudson River), the ability to provide multiple recreational uses, and the property’s location in relation to adjoining or near properties with public access.

d. Aesthetic and Cultural Resources - Properties will be evaluated for factors related to aesthetics or cultural resources benefits. Aesthetic factors may include view shed, view of property from public spaces and historical views. Cultural resource considerations include, historical features, archeology and traditional uses (i.e. hunting).
e. Institutional factors – Institutional factors shall include all those items considered that do not directly relate to the physical site characteristics. Evaluation of institutional issues will insure that the Trust considers long term O&M costs (and funding sources), liability, consistency or inconsistency with local or regional planning documents etc. Consideration is given to properties identified in a State, regional, or local master plan, guide, study, or inventory as being of special environmental, aesthetic, recreational, educational, or historic significance.

V. Conservation Purposes Test

When a project involves a conservation easement, the GLT will evaluate and document the conservation purposes of the project as defined in IRC 170(h)(4)(A) and will identify one primary conservation purpose. This evaluation will be part of completing the PEW.

VI. Flawed Offers of Property

The Trust has recognized that certain factors or issues associated with a property may result in significant diminishment of conservation or public value. In the presence of the following issues, the Trust may be precluded from accepting a property by easement or acquisition. These factors include

a. The monitoring and enforcement would be unusually difficult.

b. On-going or planned development adjacent to, or in the immediate vicinity of, the easement/acquisition would significantly diminish the conservation value.

c. The landowner requires provisions in the easement/deed that would significantly diminish the conservation value.

5.4 The property is unalterably contaminated, or contains contamination or other risks which diminish the cost/benefit or practicality of the easement/acquisition.

VII. Confidentiality

The Trust’s acquisition activities will often result in the collection of financial and other information for properties as well as their landowners. Since PEW’s contain information that may be considered “sensitive” to most landowners, the Trust will treat all PEW’s as private documents and will not release the PEW or any information gathered during the property assessment without the written permission of the Property Owner. In the event information is released pursuant to a court order, the Trust will notify the Property Owner as soon as the court order is received.
Table 1: Summary of Land Evaluation Criteria

<table>
<thead>
<tr>
<th>Water &amp; Land Resources</th>
<th>Wildlife Habitat</th>
<th>Open Space &amp; Public Access</th>
<th>Aesthetic &amp; Cultural</th>
<th>Institutional Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Riparian areas</td>
<td>□ Rare, threatened or endangered species</td>
<td>□ Connectio n to other public lands</td>
<td>□ Important view sheds</td>
<td></td>
</tr>
<tr>
<td>□ Rivers, streams, waterways</td>
<td>□ Priority habitat conservation</td>
<td>□ Current access/publ ic use</td>
<td>□ Known or suspected archeologi cal sites</td>
<td></td>
</tr>
<tr>
<td>□ Hudson River Tributaries</td>
<td>□ Habitat condition</td>
<td>□ Potential for public access to resources of local or regional interest</td>
<td>□ Proximity to historical sites</td>
<td></td>
</tr>
<tr>
<td>□ Open water, ponds, lakes</td>
<td>□ Fragmentation</td>
<td>□ Potential for recreationa l use</td>
<td>□ Visibility from a public right-of-way or public property</td>
<td></td>
</tr>
<tr>
<td>□ State or federal wetlands</td>
<td>□ Plant communities</td>
<td>□ Handicap access to critical resources</td>
<td>□ Historic views</td>
<td></td>
</tr>
<tr>
<td>□ Springs and wells</td>
<td>□ Documented biotic resources</td>
<td>□ Educationa l value</td>
<td>□ Low density use</td>
<td></td>
</tr>
<tr>
<td>□ Floodplains/Floodways</td>
<td>□ Connections to other open space</td>
<td>□ Scientific value</td>
<td>□ Traditiona l hunting use</td>
<td></td>
</tr>
<tr>
<td>□ Aquifer recharge areas</td>
<td>□ Benefit as buffer</td>
<td>□ Multiple uses</td>
<td>□ Impacts related to increased access, parking, traffic, erosion</td>
<td></td>
</tr>
<tr>
<td>□ Unique geological features</td>
<td>□ Protects migration corridors</td>
<td>□ Impacts</td>
<td>□ Site configurati on</td>
<td></td>
</tr>
<tr>
<td>□ Soils, prime farm soils</td>
<td>□ Biodiversity issues</td>
<td>□ Trail corridors</td>
<td>□ Trail corridors</td>
<td></td>
</tr>
<tr>
<td>□ Land cover type</td>
<td>□ Restoration opportunities</td>
<td>□ Sportsman use</td>
<td>□ Sportsman use</td>
<td></td>
</tr>
<tr>
<td>□ Topography</td>
<td>□ Agricultural significance</td>
<td></td>
<td>□ Reconstruction of existing structures</td>
<td></td>
</tr>
<tr>
<td>□ Agricultural significance</td>
<td>□ Property size</td>
<td></td>
<td>□ Restoration of impacted areas</td>
<td></td>
</tr>
<tr>
<td>□ Invasive species</td>
<td>□ Restoration opportunities</td>
<td></td>
<td>□ Protection of existing structures</td>
<td></td>
</tr>
<tr>
<td>□ Sediment &amp; Erosion control.</td>
<td></td>
<td></td>
<td>□ Prevention of erosion and sedimentation</td>
<td></td>
</tr>
</tbody>
</table>

Approved June 17, 2009  
Original signed by Robert Knighton, President