

Project Name: \_\_\_\_\_ Project Manager \_\_\_\_\_  
 TMP \_\_\_\_\_ Location \_\_\_\_\_  
 Acquisition / Easement (choose one) Est. Acquisition Cost \_\_\_\_\_  
 Key information: \_\_\_\_\_

	Anticipated Date	Completed Date	Responsible Party
<b>Initiate Project</b>			
Landowner contacted by HC lead			
Site visit/meeting with Landowner:			
Background: Check HC membership records			
Background: Obtain parcel map and existing GIS data			
Background: Check municipal open space map & zoning			
Visual inspection for environmental problems			
Retainer received (if appropriate)			
<b>Endowment</b>			
Endowment amount estimate calculated by HC lead, VP Res. Prot., VP-Finance and President			
Landowner informed of endowment estimate (final amount to be calculated after easement is drafted)			
<b>Go/No Go</b>			
Go/No Go Discussion - Res. Prot. & Stewardship staff			
Response letter drafted by HC lead for President's signature if No Go			
If Go, HC lead prepares proposal / letter as per HC form and sends to VP Finance for review			
Proposal / letter submitted to Landowner for signature by HC lead			
Signed proposal rec'd; copy sent to VP Finance to assign contract #			
<b>Agreement of Sale</b>			
Agreement signed			
Deposit made (\$ _____ )			
Additional deposit (\$ _____ )			
<b>Due Diligence period expires</b>			
<b>Agreement expires / Settlement date</b>			
<b>Appraisal (Required in ALL CASES)</b>			
Appraisal obtained			
Second appraisal obtained			
<b>Funding</b>			
Funder 1:			
Application deadline			
Funder contacted			
Letters of support, municipal resolution, appraisal			
Application submitted			
Acknowledgement received			
Payment available/received			
Funder 2:			
Application deadline			
Letters of support, municipal resolution, appraisal			

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Application submitted			
Acknowledgement received			
Payment available/received			
<b>Funder 3:</b>			
Application deadline			
Funder contacted			
Letters of support, municipal resolution, appraisal			
Application submitted			
Acknowledgement received			
Payment available/received			
<b>Prepare Conservation Easement (CE) or Deed Restriction Covenant</b>			
Aerial map prepared			
HC lead negotiates restrictions and draft CE with Landowner			
HC lead and Conserv. Biologist meet to discuss property's features and CE restrictions			
Final draft of CE reviewed by HC attorney			
CE reviewed by funders			
CE reviewed by HC attorney (if appropriate)			
CE sent to Landowner or municipality (and his/her attorney _____, Esq.)			
<b>Environmental Audit</b>			
Phase I Environmental audit ordered			
Existing buildings & Leases addressed			
Confirm Liability Insurance coverage			
<b>Board Approval</b>			
HC lead prepares memo on transaction for Board approval (submit 2 weeks before BOD meeting)			
Board approval rec'd on _____; copy of minutes included in file			
<b>Title</b>			
Title report (record owner/lien search/legal description) & Insurance ordered from _____ Title Co.			
Title issues cleared; mortgage subordination obtained			
<b>Subdivision Approval (if applicable)</b>			
Subdivision approved by township			
<b>Survey</b>			
Deed plotted from legal description to ensure boundaries close (optional)			

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Survey ordered in case of 1) funder requirement 2) reserved areas 3) building envelope demarcated Building envelope monumented (if appropriate)			
<b>Baseline (order min. 1 month before closing)</b>			
Conservation biologist conducts site visit			
Cons. Biologist prepares baseline documentation			
Cons. Biologist prepares Conservation Plan (if appropriate)			
Conserv. Biologist and HC lead review baseline documentation for measurability against restrictions			
<b>Pre-Closing</b>			
Arrange settlement location, notify all parties			
Request checks from funders			
Request check from VP Finance (at least 2 weeks in advance)			
Notify VP Advancement of closing			
VP Advancement drafts acknowledgement letter to Landowner for Pres to sign (including reminder that Landowner may need to file IRS Form 8283 (Noncash Charitable Contributions); told that Conserv. Biologist will be contacting him/her; asked to sign attached publicity release; and given honorary 1-year HC membership) <b>(To be completed w/in 48 hours after closing)</b>			
Publicity release received back from Landowner			
Endowment check received at closing and forwarded to VP Finance OR Pledge form executed and copied to VP Finance & VP Advancement			

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<b>Closing</b>			
HC lead brings: 1) agreement of sale 2) DCNR deed restrictions, covenant w/county, CE 3) check 4) board resolution authorizing acquisition 5) board approval authorizing signature			
Legal documents signed and notarized at closing			
Baseline documentation accuracy statement signed by both parties at closing and attached to baseline report (if not part of Easement)			
<b>Post-Closing</b>			
Executed legal document (CE/Deed) recorded by _____, stamped duplicate obtained showing book and page information where recorded			
Director of Property Mngmt. calls insurance agent to add property (if owned)			
Original executed document showing stamped recording information obtained from courthouse			
Resource Protection Admin. Asst. gives original CE/Deed to VP Finance for storage in safe deposit box .			
Copy of executed legal document made for file (becomes Master Copy)			
HC lead sends VP-Finance: 1) copy of settlement sheet 2) copy of Deed for owned properties 3) Copy of appraisal page(s) showing value			
HC lead notifies Dir. of Advancement of closing			
<b>Transfer to Property Stewardship</b>			
<b>Within two weeks after closing.</b> HC lead convenes meeting with Conserv. Biologist, Resource Protection Admin. Asst., VP Finance, Dir. of Property Mngmt., and Advancement staff (Grants, Communications, Major Gifts) to review property issues, turn over file, and complete this checklist			
<b>Director of Property Mngmt. prints copy of checklist for President to sign for file</b>			
Monitoring schedule established at meeting			
Development staff enters pertinent Landowner information into database			
Press release distributed by Dir. of Advancement			
Dir. of Property Mngmt. assigns site a property #; informs VP Finance			

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Resource Protection Admin. Asst. ensures file is complete and 1) marks Master Copy in red ink 2) makes extra, stamped copies and marks them as File Copies 3) makes 3 copies of maps; and 4) notes and dates final (vs. draft) versions of documents and maps			
HC lead arranges for property information to be entered in HC Property & Easement database by Conserv. Biologist			
Draft summary sheet printed out from database by Conserv. Biologist and given to HC lead for review			
Conserv. Biologist adds finalized summary sheet to hard copy book and sends copy to Dir. of Advancement			
Application for property tax exemption pursued by VP Finance/General Counsel (if appropriate)			
Conservation Biologist send letters to Landowners both before and after annual site visit			
<b>Follow-Up</b>			
VP Advancement arranges press conference (if appropriate)			
Dir. of Prop. Mngmt. obtains written Landowner approval to erect HC sign			
"Property Protected" sign erected at site by Prop. Management Dept.			
Pledge and other monies monitored by VP Finance			
Landowner's neighbors contacted by Advancement Dept. (optional)			
President's Signature			