Post-Closing Checklist: Conservation Projects

To be used upon closing a project by the Project Manager and Conservation & Stewardship Coordinator

Project Name:

Project Manager Checklist:

- ☐ Scan ALL recorded documents to the project folder and file appropriately.
  - ☐ For easements: Print two copies of recorded docs – one for the office baseline binder and one to be sent with CWA to the Grantor. If applicable, print another copy of recorded docs and Baseline for Grantor's CPA, Attorney or Appraiser.
- ☐ Scan the entire baseline binder so there is a complete and accurate representation of the baseline as it will be archived. File with other Final Documents
- ☐ Clean up the project folder on the server (see Land Projects Folder Guidelines document)
  - ☐ Make sure project file is named correctly (see Naming Convention) and properly organized (see Folder Contents Guideline).
  - ☐ Make sure the *final* CE Summary (as approved by the Board or Exec Committee) is included in the Board Approval folder.
  - ☐ Make sure the Project Selection Criteria is a complete and accurate record of the project at the time it was given preliminary approval.
  - ☐ Move project folder from "active" to "closed"
  - ☐ Make sure all relevant emails are included in the "Correspondence" folder. This includes any external or internal emails that could provide future insight for Stewardship staff in interpreting and understanding the easement and project.
  - ☐ Add a "Post Closing" folder to project file and related sub-folders (see Folder Guidelines)
    - Include a copy of the Title Review Memo in the Archive folder.
  - ☐ Add a FINAL DOCUMENTS folder to project file (see Guideline) and save scanned recorded documents within said folder
- ☐ Update Critical Correspondence folder to ensure relevant email correspondence, <u>in chronological order</u>, is included along with:
  - ☐ The "final approval" email/letter from LTTN counsel (ask TD to send if you weren't cc'd)
  - ☐ Critical easement/project negotiation correspondence (ask TD as well)
  - ☐ Any correspondence relating to tax benefits (other than post-approval packet)
- ☐ CWA documentation (for easements and bargain sales)
  - ☐ Draft CWA (for Liz to sign) and CWA Cover Letter (for you to sign)
  - ☐ Scan BOTH SIGNED LETTERS to the project folder on the server
  - ☐ Mail out both <u>along with</u> copies of all recorded documents
- ☐ Update MONDAY's "Active Projects" and "Closed Projects" board.
- ☐ Pass the project off to Conservation & Stewardship Coordinator and make sure s/he has all the *original* documents (including the Engagement Letter) for archiving purposes.
  - ☐ Inform Coordinator of all parties associated with the project (this includes attorneys, CPAs, partners unnamed as grantors, property managers, etc.).
  - ☐ Ensure Coordinator has the property's correct "Primary Contact" for stewardship/monitoring purposes as well as for Easement notice purposes.
  - ☐ Inform Coordinator of any special monitoring information (gate codes, unmarked driveways, access easement, pedestrian access only, etc.).
- ☐ Ask mapping specialist to add final property boundaries shape file to the Lands Protected by LTTN GIS layer.

- Email Kayla and Communications Manager with an update on the closing and 1-2 sentences about the project. Work with Communications Manager regarding press release or newsletter article as appropriate.
- Once you confirm all important photos and docs have been uploaded from the iPad, delete all project information from the device. Also delete all unnecessary files from Dropbox.
- For properties where LTTN takes title (e.g., donations of land/bequests/land purchases), send recorded deed plus any documentation of value (appraisal if applicable or CRS/assessed value documentation) to Finance Director so that property is included in financials.

Conservation & Stewardship Coordinator Checklist:

- Update LOCATE record:
  - Change status to “completed” and fill out approval, recording, and signing info.
  - Include all associated parties (as given to you by the project manager)
  - Double check parcel numbers, CVs, approval dates, etc.
  - Update CVs and Reserved Rights from the final Board approved CE Summary (not the baseline).
    - Atypical provisions must be pulled from the final Board approved CE Summary.
  - Complete title information (and appraisal information if available)
  - Update acreage breakdown in Locate; ask GIS Specialist to add to COR Metrics
  - Change CE/FT contact to “conservation easement donor” or otherwise applicable status.
  - Ensure you have the correct stewardship/monitoring contact listed.
  - Add Monitoring Information as provided by Baseline (e.g. directions, distance, travel time, etc.) and as provided by the Project Manager (e.g. contact, special notes, access/vehicle information, etc.)
- Complete the Archive Checklist
  - Include Title Review Memo in the archive package.
- Send email to Project Manager to do a final Locate record review
- Send email to Transaction Director to do a final review (leave Baseline office copy on their desk)