

RULE: [Project #]_[Grantor's Name (in as few words as possible)]

1. Initial Project Naming Guide

A. Project #:

- i. Projects won't get an official # until closing, so all proposed, new, or ongoing projects will have the number "000" until they close (in LOCATE).
- ii. Fee owned properties get a project number when the deed to us has been recorded (even if we plan to immediately market the property for sale subject to an easement).

B. Grantor's Name:

- i. If grantor is an individual → use his/her last name.
 - a) Examples: 009_Sugg
321_Sevy
- ii. If there are multiple grantors (e.g. siblings or a married couple) → use the last name of the primary point of contact.
 - a) Examples: 327_Skelton (Melody's husband has different last name)
- iii. If the grantor is an organization/entity → use the organization's name in as few words as possible
 - a) **Use the first word of the org's name OR the two most descriptive words** in the name (i.e. those that make it clear the grantor is an *organization*, not an individual). Use common sense! Examples:
 - The Cumberland Heights Foundation, Inc. is shortened to: Cumberland Heights
 - Beaverdam Investment Company, L.P. is: Beaverdam
 - Leiper's Fork Title Holding Trust, LLC is: Leiper's LLC
 - Note: it is not "Leiper's Fork" because that would imply the town, not a company
 - Partners in Conservation, LLC is: Partners Conservation
- iv. If the grantor is actively working on more than one ongoing project → Use the same RULE but add a "-" after the grantor's name, followed by a descriptor that helps differentiate the individual project (e.g. road where the project is located). Examples:
046_Mossy Creek – Tarr Road
047_Mossy Creek – Flat Gap Road
- v. If there are two concurrent projects with different grantors who share a last name → use a first initial to distinguish between the projects. Examples:
001_A. Preston
002_C. Preston
- vi. If grantor is a trustee → use one word describing the name of trust (not the trustee) + the word "Trust." Example: If the grantor is "Diversified Trust Company, Inc., Trustee of the XYZ Living Trust established u/a dated December 5, 1995" then the project name should be "_XYZ Trust"
- vii. If grantor is an estate → use last name of the deceased (not the executor) + the word "Estate." Example: If the grantor is "Tammy Reitz-Lewis and Peter Whan, Co-

Executors of the Estate of Pamela Carol Westrick, Deceased” then the project name should be “_Westrick Estate”

- viii. **EXCEPTIONS:**
- a) If the project involves the protection of a public space, such that the name of the place is unlikely to ever change, use the public name instead of the grantor’s name. Example: 337_Lakeshore Park (*not: 337_City of Knoxville*)
 - b) If we are facilitating a project on behalf of another entity or organization, use the grantor’s name OR use the name the property will be called (assuming it will be open to the public at some point). If it will only be a portion of a larger public area, indicate this in the “public name” field, and use grantor for project name.
- C. USE THIS NAMING CONVENTION FOR ALL INTERNAL PROJECT MATERIALS going forward, however, leave the “Project #” portion of the name blank. Internal project materials include the following: the Preliminary Report, Initial Maps, Active Logs Spreadsheet, LOCATE, and Server File
- i. So active projects go by their last name only: Vatter, Heffner, Creasman, etc.
- D. For EXTERNAL facing materials (e.g. Baseline and Easement) → use good judgment!
- i. If the grantor is part of a group of individuals with different last names, ask how the group refers to the property and use that name if appropriate (e.g. Crossfire Ranch).

2. LOCATE Record Naming Guide

- A. In general, the same RULE applies (see above). Start there.
 - B. For the “CE/FT” record page specifically: the RULE applies, but the CE/FT name will be added to over time:
 - i. When the property transfers to a new owner → include the new current owner’s last name in parenthesis following the original name. Examples:
 - 041_Porter (Jackson)
 - 027_South Cumberland (University South)
 - Note: The core name (project #_original grantor) will stay the same forever. However, the name in parenthesis will change over time according to ownership.
 - b) If the property is transferred to a new owner who bears the same name as the grantor, distinguish the new owner by adding a first name initial. Example:
 - 052_Olson (M. Olson)
 - ii. When the property is subdivided → add lowercase letters to the project number: “a” will indicate the original core property, while “b”, “c”, etc. will be the property that’s been subdivided off, and presumably, there will also be a new owner. Examples:
 - 024a_Oak Grove
 - 024b_Oak Grove (Conrad Powers)
 - Note: there’s no “,” or “.” in “LLC”
 - iii. Note: Use the rules above for adding to the project file name on the Server too.
- C. For the “Property” record page:
- i. Use the same project # as always, but shorten the grantor’s name to just one word if possible. Generally, this word will be the last name of the grantor.
 - a) Note: it does not matter that some projects share a name even where the grantor is not the same person, because each has its own unique project #. The “property” record name is only for use in LOCATE and is simply shorthand.

- D. For the “Public Name” field in both record types:
 - i. For older projects → we’ve entered the name of the project as it was named on the server and/or baseline binder
 - ii. For projects going forward → only use this field where the property has a name that is distinct from the grantor’s name.
 - Examples: Tenebo, Sweet Easy Farm, Windy Acres, Spring Mount Farm
 - iii. Note: Not all projects will have a “public name”
- E. For “Active” Projects → use “000” as the project number
 - i. This will make it extremely easy to pull up all active projects (just search “000”)
- F. For “Declined” or “Withdrawn” Projects → do not use a project number (just a name)