

Conservation Trust for Florida, Inc.

Easement Process

CTF prioritizes building relationships with landowners to reach its mission to protect the rural landscapes of Florida. Throughout the conservation easement process, landowners are informed of CTF's priority to support its mission and to follow a selection process that prioritizes land that represents values which support CTF in achieving its mission. Landowners will be contacted throughout the following process.

1. Initial landowner contact and completion of Landowner Questionnaire by landowner.
2. Site visit with CTF and landowner to document and inventory biological features and current conditions of property at time of easement (maps, technical description, et cetera); write Resource Evaluation Form and Easement Documentation Report. Send draft to landowner.
3. CTF staff and landowner discuss monitoring needs of property and Easement Stewardship Fund with voluntary cash contribution to endow the perpetual monitoring of the property.
4. Conditional approval by CTF Land Protection Committee and Board of Directors. Landowner is contacted with recommendations. It is estimated that the conservation easement can be completed approximately 180 days after this point.
5. Conduct Environmental Assessment and Preliminary Site Evaluation and complete all forms.
6. Conduct Title Search. Develop Conservation Management Plan- landowner, landowner's manager, forestry consultant, and CTF.
7. Negotiate legal easement constraints- CTF, landowner, and attorneys.
8. Prepare easement specific to the property and conservation values - attorneys, landowner, and CTF.
9. Finalize Easement Documentation Report with aerial photos, maps, baseline documentation.
10. Obtain Title Commitments and Title Insurance Policies
11. Conduct appraisal of property- landowner's appraiser (as necessary).
12. Conduct survey of proposed easement if necessary.
13. Final easement review by all parties.
14. CTF Land Protection Committee makes recommendation and summary of conservation easement to CTF Board of Directors

15. Final easement approved by CTF Board of Directors.
16. Signature of easement by all parties
17. Record easement in public records- landowner's attorney confirmed by staff. (Include cover letter to serve as "notice" if permitted by the Clerk of Court.)
18. CTF signs IRS Form 8283 prior to April 15.
19. Request payment for stewardship fund when tax benefits are realized by landowner.
20. Monitor easement condition annually in perpetuity- CTF and successor organization where applicable.
21. Landowner's phone, email and physical dwelling address and contact information is always kept up to date by contacting the landowner directly or by either of the three above named methods on a bi-annual basis.

Adopted by the Board of Directors of the Conservation Trust for Florida, Inc. on November 28, 2005. Revised by Board of Directors of the Conservation Trust for Florida, Inc. on September 27, 2006.