Commonwealth of Massachusetts
EOEEA Restriction Baseline Documentation Report Specifications for the Forest Legacy Program Revised September 12, 2017

I. Definition, Purpose, and Objectives

A Baseline Documentation Report ("BDR") consists of maps, narratives and photographs, which portray the condition of a restricted property at the time of the BDR. The purpose of the BDR is to provide a baseline from which future changes to the property, whether natural or human-caused, can be measured. These changes could be allowable under the terms of the Restriction or in violation. The Baseline Documentation Report is a critical instrument for ensuring that the terms of the Restriction are honored in perpetuity. It is the primary reference used during subsequent monitoring visits, and provides important evidence to defend the Restriction in the event of a violation.

The Restriction drives the contents of the Baseline Documentation Report. Each Baseline Documentation Report must be tailored to the specific purposes, prohibitions, and reserved rights in each Restriction.

The objectives of a Baseline Documentation Report are to:

- Objectively and accurately document the natural and/or agricultural resources, physical features, improvements, condition, and uses of the property as they relate to the purposes and prohibited and permitted uses in the Restriction;
- Provide information to the landowner about their land, the Restriction, and resource values that merit protection;
- Guide future monitoring activities;
- Establish a starting point to measure compliance with the Restriction;
- Foster positive landowner-agency relationships.

The BDR Report Author may be a contractor, Agency staff, or volunteer. Section II, below, applies only to contractors.

In these Specifications, "the Agency" refers to the Department of Agricultural Resources (DAR), the Department of Fish and Game (DFG), or the Department of Conservation and Recreation (DCR), or a Municipality. The term "Restriction" refers to a Conservation Restriction (typically held by DFG, DCR, or a Municipality), Agricultural Preservation Restriction (typically held by DAR), or Watershed Preservation Restriction (held by DCR Division of Water Supply Protection).

II. Important Information for Contractors

A. Agency Approval of BDR Author

In cases where the Contractor is a partnership, firm or corporation, you shall identify, in advance of any work being initiated, the individual(s) who will perform the inspection and write the report, and who are substantially responsible for report coordination and assembly. The Agency has the option of approving said individual(s) as the service provider(s) or requesting that you indicate another individual. If you and the Agency cannot agree on an individual to perform the service then the Agency may select another Contractor to perform the service. The individual(s) agreed upon for inspection and report writing shall be the principal researcher and principal author of the report and shall sign the Letter of Transmittal (p. 16) and the Baseline Preparer Affidavit (p. 39).

B. Liability

You must understand and accept that completion of a BDR site inspection may involve foot travel to remote areas, and you accept responsibility for your personal safety in this regard.

C. Confidentiality

Contents of BDR shall be considered confidential. Do not discuss conditions observed on the property or contents of the completed BDR with anyone other than Agency personnel, the landowner, or the landowner's agents.

D. Timeliness

You must respond in a timely manner to any inquiries by the Agency regarding BDR status.

E. Pre-Work Meeting

The Agency may require a pre-work meeting to review the project-specific scope of work and provide for any special requirements. The meeting may be held in-person at a location selected by the Agency, or it may be conducted by phone. If a pre-work meeting is required, it will be stated in the project-specific scope of work, and you should include your attendance at this meeting when preparing your bid.

III. Prior to the site visit

A. Agency or Forest Legacy Program (FLP) Partner Supplied Data

The Agency or FLP Partner will supply the following information:

- Name and contact information for the Agency/Forest Legacy Liaison (contact person).
- Access to Agency or FLP Partner files for the Contractor to review at the pre-work meeting and/or as necessary during BDR preparation.
- Agency-Designated Restriction Name (provided by Forest Legacy Program).
- Agency-Designated Restriction ID Number (provided by Forest Legacy Program).
- GIS shapefile of property boundary, with a note as to whether the Agency or FLP Partner considers the shapefile to be provisional or well-researched.
- Waypoints shapefile template.
- Landowner's contact information.
- Copy of the Recorded Restriction and Assignment, Coholder, Amendment, Release, and any other relevant recorded documents (unless available online).
- Information about easements and rights of way on the property (copied from title examination), for inclusion in the Restriction Information Summary (p. 18).
- Forest Management Records, i.e. Forest Management Plans, Forest Stewardship Plans, and Forest Cutting Plans (when available and applicable), for inclusion in BDR Appendix "Management Plans."

- Natural Heritage Program Rare Species Information (when applicable), for inclusion in BDR Appendix "Natural Heritage Program Rare Species Information". (refer to: "Section VI: Appendices", page 44).
- Restriction History & Chronology information (when available), for inclusion in BDR Appendix "Restriction History and Chronology."
- Baseline Samples file.

B. Ownership Verification

Verify landowner contact information supplied by the Agency or FLP Partner in order to contact the landowner and report the landowner contact information in the Restriction Information Summary (p. 18). Also check whether the property has been subdivided, including, as applicable, Registry of Deeds records, Assessor's records, personal interviews, and/or internet research.

C. Landowner Contact

Notify property owner in writing of your assignment to prepare a Baseline Documentation Report and your need to meet with them and visit their property. A sample Landowner Letter is included in the Baseline Samples file provided by the Agency. Make a reasonable effort to meet in person with the landowner, or the primary contact, to ask the Landowner Questions included in Part A of the Site Visit Report (p. 30) and to get them to sign the Acknowledgment of Baseline Conditions (p. 41). The landowner may or may not opt to walk the site with you. Although meeting in person is not a requirement at any specific point in the process, it is expected that you will meet with the landowner at least once unless the landowner is not available to do so. Document all contact in the BDR Appendix "Landowner Contact Log" and include copies of written documents and emails in the BDR Appendix "Landowner Correspondence."

D. Forest Management Information

The Agency/Forest Legacy Liaison or FLP Partner will supply you with available Forest Management Records, i.e. Forest Management Plans, Forest Stewardship Plans, and Forest Cutting Plans., when available and applicable. In addition, ask the landowner whether they have any of these documents. You do not have to get copies directly from the DCR State Service Foresters. Forest Management Records from the last 10 years should be included in the BDR Appendix "Management Plans."

Recent, current, or planned forestry activity should be reported in the Site Visit Report (p. 30), as it is relevant to the terms of the Restriction.

E. Read the Restriction Document

Read the Restriction and familiarize yourself with its terms. Everything you look for on the site visit and report on in the BDR will be based on the terms of the Restriction. You may wish to summarize them for your own use prior to going out on the property. Contact the Agency/Forest Legacy Liaison if you have any questions about the terms of the Restriction.

F. Review Required BDR Contents and Deliverables

Much of the information required for the BDR will be gathered during the property site visit. Review the required BDR contents and forms (see Specifications Section VII, p. 14) as well as the deliverables required by the Agency (see Specifications Section VI, p.12).

G. Boundary Research and Shapefile Drafting

The Agency/Forest Legacy Liaison or FLP Partner will supply you with a GIS shapefile of the property boundary, with a note as to whether the shapefile is provisional or well-researched. If the shapefile is provisional, you should consult additional sources such as the boundary description in the Restriction, the boundary description in the property deed, property survey or exhibit plan, abutters' deeds, abutters' surveys, the landowner, neighbors, Agency file information, assessor's maps (digital and/or paper), MassGIS Open Space data, MassGIS orthophotos, and MassGIS roads information to further refine the property boundary shapefile. If you are given a well-researched shapefile, you only need to double check it against the survey or exhibit plan and the boundary description in the Restriction. For both types of shapefiles, you should also make notes for your own use about boundary markers to look for when walking in the field (i.e. look if a survey calls for iron pins).

H. Begin Drafting the BDR

It is useful to begin drafting some of the required BDR contents, particularly BDR Section I: Restriction Information Summary (p. 18) and BDR Section II: Maps (p. 23) prior to the site visit.

IV. Site Visit

A. Purpose, Results, Tasks

The purpose of the site visit is to inspect the condition of the property with respect to the terms of the Restriction. Depending on the property, weather conditions, and landowner availability, it is possible that a "site visit" might take place over several days.

Please be aware of safety on the site visit. Treat abutting properties with respect when walking and photographing boundaries.

Several tasks should be completed during the site visit:

- Meeting with the landowner to ask the Landowner Questions included in Part A of the Site Visit Report (p. 30). The Agency/Forest Legacy Liaison will direct you as to whether you are required to walk the property with the landowner. If you do walk the property with the landowner, be cautious when asked to interpret prohibited/allowable uses. Refer them to the Agency. Do not make comments to the landowner that reflects judgments or determinations about whether the observed conditions are in compliance with or in violation of the terms of the Restriction. Refer them to the Agency/Forest Legacy Liaison if they have questions (see "Suspected Conflicts with Restriction Terms" section, below, for more about interactions with the landowner).
- Walking the boundary and portions of the interior (see below).
- Taking waypoints (see "Waypoints" and "Waypoints Shapefile" sections, below).
- Taking photographs (see "Photography" section, below).
- Making notes about the boundary markings, natural and man-made features for the Monitoring Map (p. 27) and Site Visit Report (p. 30).

On the site visit, **the entire boundary** of the Restriction should be walked, except for portions that are impassible or impossible to locate. While walking the boundary, you should check your GIS shapefile of the boundary against markings on the ground and make notes about the boundary markings for the Monitoring Map and Site Visit Report.

Walk **portions of the property interior**, focusing on:

- The **purposes and values** listed in the Restriction. For example, if watershed preservation is a purpose, each stream and wetland on the property should be visited.
- The **permitted and prohibited uses** listed in the Restriction. For example, if no new trails are permitted, all currently existing trails should be inspected.

- **Areas of possible future encroachment**, such as along public roads, where woods roads and trails enter the property, and where an abutting property is actively used up to or near the boundary.

Using GPS, record the approximate route traveled during the site visit as a line on the Waypoint and Route Map (p. 35). Describe the site visit in narrative form in the Site Visit Report (p. 30). You may wish to use the Sample Field Notes Form included in the Baseline Samples file provided by the Agency.

B. Photography

The purpose of baseline photography is to show the current visual condition of the property with respect to the Restriction, so that future changes can be measured against them. Be thoughtful when composing photos and choosing their locations; keep in mind lighting, clarity, composition, and efficiency (e.g., try to capture more than one subject in a single photo). Include subject-specific photos as well as overview photos. As described below, record waypoints at each location from which a photograph is taken. Thus, when taking a photograph, the photographer should stand at a permanent or semi-permanent landmark whenever possible. The photographs should be clear and identifiable.

At the conclusion of the site visit, all photographs taken at the property must be downloaded, unaltered, to a folder which will be included in the digital deliverables as described in Specifications Section VI. C. (p. 12). Photographs selected to be printed in the report will be included in BDR Section IV: Waypoints and Photographs (p. 34). In most cases, all photographs taken on the site visit will be used, although photographs that do not show the condition of the property (blurry photographs, for example), or are plainly redundant, should not be printed in the BDR. Identifying numbers assigned by the camera for each printed photograph must be included in the Photo File Name column in the List of Waypoints and Documentary Photographs (p. 36).

Photography of the Restriction Terms

Take a sufficient number of photos to document:

- **The purposes and values listed in the Restriction.** Every purpose and value listed in the Restriction should have at least one associated photograph, but not every single landscape feature related to the purposes and values needs to be photographed. For example, if agricultural preservation is a purpose, there should be representative photographs of active and inactive agricultural fields.
- **The permitted and prohibited uses listed in the Restriction**. Each permitted and prohibited use should have at least one associated photograph, unless there is nothing on the ground related to that use. For example, if structures are prohibited, every structure on the property should be photographed. If there are no structures on the Restriction, there would be no photographs related to that prohibition.

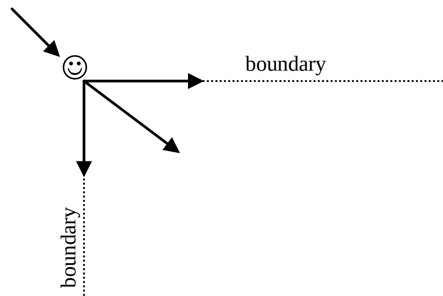
Overview Photographs

Take a reasonable number of photographs from locations such as hills or field edges that allow a good view of large portions of the property, if such locations exist on the property.

Photography of the Boundary

- **Boundaries - Areas of possible future encroachment**. Photographs should be taken wherever woods roads and trails enter the property and where an abutting property is actively used up to or near the boundary. Representative views along public roads should be photographed.

- **Corners – General property conditions**. In addition to the above photographs, take a total of no more than about 30 photographs from property corners, to represent the general condition of the property. Corners are a good place to take these pictures because they are permanent landmarks, generally marked by iron pins, intersections of stone walls, etc. Corner photographs should also show a representation of boundary markings, so that future monitors will know what to look for when attempting to follow the boundary. For a smaller property without many boundary corners, this may mean taking up to 4 photographs at each corner (one photograph looking back along the boundary line, one photograph looking forward along the property line, one photograph looking into the property, and one photograph of the corner markings themselves). For larger properties or those with more complicated boundaries, photographs should be taken only at strategic corners that are geographically dispersed and show the range of conditions on the property.



C. Waypoints

A waypoint is a specific physical location on the property that is pertinent to future monitoring of the Restriction. To the extent possible, waypoints should be recorded using GPS at permanent or semi-permanent landmarks that can be easily identified in the field (property corners, edges of buildings, utility poles, rock outcrops, stone walls, fence corners, etc.). A waypoint must be recorded for all photographs at the point at which the photographer is standing. Waypoints should also be recorded for marked boundary corners (a corner with an iron pin, sign, intersection of stone walls, etc.), even if a photograph is not taken at that boundary corner. Thus, every photograph will have a waypoint, but not every waypoint will have a photograph.

Waypoints should be recorded using GPS unless it is impossible to get a GPS reading for a certain point (for example, due to topography, satellite conditions, and/or heavy vegetation). When recording a waypoint using GPS, enable averaging if possible, with 60 positions collected for each waypoint to improve accuracy. Whether or not a GPS point is recorded, for each waypoint you must: a.) fill out the information for the waypoint in the List of Waypoints and Documentary Photographs (p. 36), b.) include the waypoint on the Waypoint and Route Map (p. 35), and c.) include the waypoint in the GIS waypoints shapefile on the BDR CD/DVD (see Specifications Section VI.C., p. 12).

D. Waypoints Shapefile

The following waypoint information shall be gathered during the site visit and delivered in shapefile format on the BDR CD/DVD (see Specifications Section VI.C., p. 12) and in printed form as BDR Appendix "Waypoints Attribute Table". A waypoints shapefile template will be provided by the Agency. Be sure to include at least three "control waypoints," taken at locations clearly visible on an aerial photo, e.g. road or stream junction on or near the Restriction property. Identify each of them as a "control waypoint" in the comments field of the waypoints shapefile.

Document the following for each waypoint (in the waypoints shapefile):

- Date
- Waypoint number
- GPS accuracy
- Number of photographs taken
- Property boundary code
- Boundary certainty
- Natural feature code
- Cultural feature code
- Land use code
- Road feature code
- Potential issues
- Comments

These codes are to help the Agencies standardize and store the data collected by baseline contractors. The codes are not a list of items to find on the property. Not all codes will be filled in for each waypoint. When there is no applicable code, leave the field blank. Further explanations for each of the items are below.

Date
This should be the date on which the waypoint was recorded.

Waypoint number
This should be the same as the waypoint number in the List of Waypoints and Documentary Photographs (p. 37), allowing the shapefile to be matched to the list. Record the number as an integer without any alphabetical characters.

GPS accuracy
This is a measurement of the estimated positional error and should be given in meters. It is displayed in many commercial GPS units as the accuracy of a given point. If the GPS unit does not display an accuracy value but instead allows the user to set a PDOP mask, please use that value instead.

Number of photographs taken
This should be the number of photographs taken at each waypoint. It should be recorded as "0" for waypoints at which no photographs were taken. The count of photographs should include all photographs taken, even if the photo is not printed (because it does not accurately depict property conditions).

Property boundary code
These codes are used to describe boundary markings. If the waypoint is taken at a property boundary that has an iron pin, blaze, and stone wall, use the code that describes the marker of greatest legal standing. If the waypoint is not on a boundary, this field should be left blank.

Boundary Code	**Boundary Code Description**
bz	Blaze
dh	Drill Hole
fe	Fence (Can be made of barbed wire or other material)
fc	Fence Corner

fr	Fence Remains
fl	Flagging
hf	Hydrography Feature (river, stream, pond, lake, shoreline)
ip	Pin - Iron Pipe/rebar/Gun Barrel set in the ground
rd	Road
si	Sign - Agency or landowner boundary sign
nm	Stone Monument (a natural stone set upright into the ground)
sp	Stone Pile (stones piled on top of the ground -stake may or may not be present)
vr	Stone piles - Virginia Rail (small stone piles set in a zig-zag pattern that formerly supported a wooden fence line)
cw	Stone Wall - Corner of
ew	Stone Wall - End of
ow	Stone Wall - Opening in
sw	Stone Wall - Point along wall
jw	Stone Walls - Junction of
sm	Stone/Concrete Monument (e.g., a manufactured item like a granite or concrete post set in the ground)
su	Survey Monument (eg. Land Court or USGS disc set by surveyor) – note in comment field
tm	Town/State Line Monument
tr	Tree - Boundary (tree as monument called in deed or plan)
um	Un-monumented (no monument observed, whether or not called in deed or plan)
ot	Other boundary feature (eg. Ledge called in deed) – note in comment field

Boundary certainty
Certainty is the confidence that a boundary waypoint is in fact the actual boundary. Certainty should be reported as "high", "medium", or "low". For example, an observer encounters a stone wall in the vicinity where the property boundary is shown on the field maps. If there is no blazing, painting, signage, or flagging along this wall, the observer cannot be certain that it actually represents the property boundary. In such a case, the certainty should be medium or low. If the waypoint is not on a boundary, this field should be left blank.

Natural feature code
These codes are used to describe the natural features at a waypoint. If there are no notable natural features at the waypoint, this field should be left blank.

Natural Feature Code	Natural Feature Code Description
be	Beaver Dam
in	Invasive Plant
se	Seep/Spring
vp	Vernal Pool
wt	Wetland Boundary
hf	Hydrography Feature (river, stream, pond, lake, shoreline)
ot	Other Natural Feature (See comments)

Cultural feature code
These codes are used to describe the cultural features at a waypoint. Cultural features are evidence left from historic human activity. Boundary monuments not located on the Restriction

perimeter (ie. interior bounds) should be coded as Cultural features. If there are no notable cultural features at the waypoint, this field should be left blank.

Cultural Feature Code	Cultural Feature Code Description
ew	End of stone wall
jw	Junction of stone walls
vr	Virginia Rail (small stone piles set in a zig-zag pattern that formerly supported a wooden fence line)
nm	Stone Monument (a natural stone set upup rightupright into the ground)
sm	Stone/Concrete Monument (e.g., a manufactured item like a granite or concrete post set in the ground)
sp	Stone Pile (stones piled on top of the ground)
hm	Historic Mill Site
hf	Historic Foundation
sd	Stone Dam
wl	Well
cm	Cemetery
ot	Other Cultural Feature (See comments)

Land use code
These codes are used to describe the land use features at a waypoint. Land use is evidence left from relatively current human activity. If there are no notable land use features at the waypoint, this field should be left blank.

Land Use Code	Land Use Code Description
bd	Building (i.e. house, barn, garage)
st	Structure (i.e. shed, lean-to, tent platform)
wl	Well
hv	Forest Harvest
ut	Utility or Telecommunications Delivery System
ss	Septic System or Leach Field
ex	Excavation
dm	Dumped/Stored Materials
dv	Dumped/Stored Equipment or Vehicles
dg	Dumped/Stored Rubbish or Garbage
do	Dumped/Stored Organic Material or Compost
ag	Agricultural Activity, Tillage
lv	Livestock
da	Domestic Animal
co	Commercial Use
ks	Kiosk/Sign (not a boundary sign)
ot	Other Land Use (See comments)

Road feature code
These codes are used to describe the road features at a waypoint. If there are no roads or trails at the waypoint, this field should be left blank.

Road Feature Code	Road Feature Code Description
br	Bridge
cu	Culvert
er	Erosion Site
fo	Ford (stream crossing with no bridge or poles)
jr	Junction of Roads
pr	Road – Paved (asphalt or other impervious surface)
gr	Road – Gravel (surface graded and gravel or other pervious material added)
dr	Road - Unimproved (dirt / leaf litter surface)
sk	Skid Road > 6' w/obstacles (evidence of past skidder use but stones and / or deep ruts)
at	Trail - ATV / Snowmobile > 3’
tr	Trail - Hiking/Pedal Bike < 3'
pl	Parking lot
gt	Gates
ot	Other Road Feature (See comments)

Potential Issues
This field is used to flag any potential issues or violations. Fill in “yes” if the waypoint is at the location of a potential issue on the property. Otherwise, leave the field blank.

Comments
This field is for any associated comments at the waypoint. If “other” is selected in any field, the comments field should be used to define what was seen. The comments field should also be used to define the “control waypoints.”

E. Boundary Shapefile Generation and Reporting

Compare the property boundary shapefile provided by the Agency with the waypoints and other information gathered during the site visit as well as with any other boundary research you have done (see Specifications Section III.G., p. 3, for more information). If you believe that the Agency-provided property boundary shapefile is significantly inaccurate, generate a new boundary shapefile based on your boundary research and GPS information from the site visit. Generating a new boundary shapefile is more likely to be necessary if you have been given a provisional shapefile rather than a well-researched shapefile.

If you produce a new boundary shapefile, email it to your Agency/Forest Legacy Liaison along with the Agency-provided boundary shapefile and your GPS waypoint shapefile prior to making the maps in Section II of the BDR (p. 23). The Agency will respond in one of three ways:

1) The Agency will ask you to use the boundary shapefile they provided originally.
2) The Agency will ask you to use the new boundary shapefile you created.
3) The Agency will modify the new boundary shapefile you created and send it back to you for use in the maps.

Use the resulting boundary shapefile to create the maps in Section II of the BDR. Discrepancies between this new boundary shapefile and the boundary shapefile originally provided by the Agency should be reported on in the Boundary Discrepancy Data CD/DVD (see Specifications Section VI.C., p. 12).

F. Suspected Conflicts with Restriction Terms

If you observe a situation on the property that potentially conflicts with the terms of the Restriction, gather as much information as possible. You may inquire about any such conditions of the landowner or landowner's representatives, but **do not make any representations to the landowner about whether a violation has occurred or discuss possible Agency response to a suspected violation**. Notify the Agency/Forest Legacy Liaison immediately, in the manner specified by the Agency Liaison. Any questions from the landowner should be referred to the Agency Liaison.

V. Writing the BDR

A. Baseline Documentation Report Outline

The Baseline Documentation Report contains the following sections, headers, and appendices:

Cover Page

Letter of Transmittal

Table of Contents

Section I: Restriction Information
Restriction Information Summary
Copy of Recorded Restriction

Section II: Maps
Locus Map
Color USGS Topo Map
Color Ortho Photo
Assessor's Map
Driving Directions Map
Survey Map (if available)
Resource Map(s)
Monitoring Map

Section III: Site Visit Report
Part A – General Information
Part B – Current Property Conditions
Part C – Boundary Conditions

Section IV: Waypoints and Photographs
WaypointWaypoint and Route Map
List of Waypoints and Documentary Photographs
Documentary Photographs

Section V: Affidavits
Baseline Preparer Affidavit
Baseline Photographer Affidavit
Acknowledgment of Baseline Conditions

Section VI: Appendices
Contractor's Qualifications
Restriction History and Chronology (if provided by Agency Liaison)
Property Deed Copy
Landowner Contact Log
Landowner Correspondence
Waypoints Attribute Table
Management Plans (if provided or approved by Agency Liaison)
Natural Heritage Program Rare Species Information (if applicable)

BDR forms and form instructions are included as Section VII of the Specifications (p. 14). A sample BDR is provided by the Agency as a separate file.

B. BDR Page Numbering and Page Layout

- Use the BDR Cover Page form (p. 15) to create the cover page for each required copy.
- On each page of the report, include a header that states the Agency-Designated Restriction Name and the Agency-Designated Restriction ID Number.
- Number pages of the report consecutively, beginning with **Restriction Information Summary.**

VI. Finalizing the BDR and Deliverables

A. Work Review Requirements

All completed BDRs are subject to review for compliance with these Specifications. You may be required to submit a draft BDR to the Agency/Forest Legacy Liaison prior to report finalization. You may also be required to give the landowner an opportunity to review the draft BDR. Ask the Agency/Forest Legacy Liaison whether review by the Agency and/or the landowner will be required and how the review will be conducted.

B. Signature and Final BDR Delivery

Prior to delivering the final reports to the Agency Liaison, you may be required to obtain the landowner's signature and the Agency's signature (by its appointed signatory) on the Acknowledgment of Baseline Conditions (p. 41). Ask the Agency/Forest Legacy Liaison which signatures will be required. Signatures should be in **blue ballpoint pen**. The digital and printed copies of the BDR delivered to the Agency must contain these signatures.

If signatures cannot be obtained in a timely fashion, contact the Agency/Forest Legacy Liaison for guidance. All efforts to contact the landowner should be described in the BDR Appendix "Landowner Contact Log."

Deliver all BDR Deliverables (listed below) to the Agency Liaison.

C. BDR Deliverables

Unless otherwise requested by the Agency, the Contractor shall provide the Agency/Forest Legacy Liaison with:

Printed Deliverables:
Final printed BDR copies shall be delivered durably bound, in a manner specified by the Agency Liaison, and shall be printed on 8.5" by 11" white, premium acid-free paper. Print pages 2-sided when feasible.

Five Printed Report Copies:

- Five(5) printed copies of the final BDR, titled as follows:
  - Agency Permanent Archive Copy (as coil bound with 44+/- holes)
  - Landowner Copy (as coil bound with 44+/- holes)
  - Agency File Copy (as coil bound with 44+/- holes)
  - Field Office Copy (as 3 ring binder with acid free sheet protectors)
  - Forest Legacy Program Copy (as coil bound with 44+/- holes)

  The Agency Permanent Archive Copy, Landowner Copy, Agency File Copy, and Forest Legacy Program Copy shall have original signatures on:
  - the BDR "Letter of Transmittal" and
  - the Acknowledgment of Baseline Conditions (p. 41)

  And shall have original, notarized signatures on
  - the Baseline Preparer Affidavit (p. 39) and
  - Baseline Photographer Affidavit (p. 40).

Digital Deliverables:
Digital deliverables shall be on non-rewriteable CDs or DVDs.

Three BDR CD/DVD Copies:
One copy of the BDR CD or DVD should be securely inserted in the Agency Permanent Archive Copy. The other two (2) should be placed in a jewel case, one for the Agency and one for the Forest Legacy Program, to store separately. **The** CDs or DVDs should be labeled with the Agency-Designated Restriction Name and Agency-Designated Restriction ID Number, signed by the photographer(s) and dated. This information should either be written with a felt-tipped pen or laser scribed into the CDs/DVDs (ballpoint pens can damage CDs/DVDs).

Each copy of the CD or DVD will include:

- A digital copy in PDF format of the complete report, including photographs and all required notarizations and signatures (if no landowner signature is obtained prior to delivery, include that page unsigned).
- A folder labeled "photographs" containing the original, unaltered JPEG files for every photo taken on the site visit (even if it was not selected to be included in the printed report).
- The written portions of the BDR in editable format (i.e. MS Word).
- The tables from the BDR in editable format (i.e. Excel).
- GIS shapefiles for waypoints (from the template provided), the route traveled on the site visit, the boundary shapefile used in the BDR maps, and any other GIS shapefile generated for use in the BDR.

One Boundary Discrepancy Data CD/DVD (if necessary):
If you, in consultation with the Agency, used a modified boundary that differed from the original boundary provided by the Agency, include a map in JPEG format showing the original boundary information provided by the Agency and the new boundary shapefile you generated in consultation with the Agency. Also include a short narrative (in MS Word or similar) describing

the discrepancies in acreage and location between the boundary description in the Restriction, the original boundary information provided by the Agency, and the modified boundary shapefile used for the BDR maps The narrative should describe why and how changes were made, including the boundary research you did.

VII. Baseline Documentation Report Forms and Instructions

The following section contains example forms required to write the BDR and detailed instructions on how to complete each form. A sample BDR is provided as a separate file.

Codes for form instructions:

- Form text and form fields are in **bold**
- Notes that provide guidance or clarification on how to complete a form field are in *italics.* Do not include these notes in the final BDR.

Although not shown in these sample forms, please remember that the appropriate page header must be included on each page of the BDR (see Specifications Section V.B., p. 12).

BDR Cover Page

Conservation Restriction or Watershed Preservation Restriction or Agricultural Preservation Restriction

Choose the appropriate type of Restriction from the list or write in another type

Baseline Documentation Report

Insert iconic picture of the property, chosen from pictures taken on site visit.

Restriction ID Number(s): *Provided by Agency.*

Restriction Name: *Provided by Agency.*

Restriction Closing Date: *Date when the Restriction was recorded.*

Prepared for: *Agency name, address, and seal if provided.*

In cooperation with the
USDA Forest Service, Forest Legacy Program
(Award # XX-XX-XXXXXXXX-XX)
and
The Department of Conservation & Recreation / Bureau of Forestry

Prepared by: *Report author name and company name. Use a font consistent with the rest of the page. Do not include a logo on this page.*

Date of Report: *The site visit date. If the site visit was over multiple days, use the last day of the site visit.*

Property Location: *Property address if there is one, otherwise a description of the location.*

Acreage: *From Restriction Information Summary (p. 18)*

Copy Designation: Landowner Copy/ Agency Permanent Archive Copy/Agency File Copy/ Field Office Copy / Forest Legacy Program Copy

Choose one of the above, for each copy printed. Or, you may leave this field blank and fill it in by hand after printing.

Letter of Transmittal

Letter of Transmittal addressed to Agency Liaison, referencing:

- *Contract to prepare report by RFR number or other applicable reference; identify if source of contract or payment is other than Agency;*
- *Title and Date of Report Specifications;*
- *Identify any authorized departure from specifications not otherwise noted in Agency Specific Addendum (ie. as indicated in request for project specific bid);*
- *Agency-Designated Restriction ID Number;*
- *Manufacturer and product number of papers used in the report.*

Lindsay Nystrom
MA Forest Legacy Program Coordinator
DCR/ Bureau of Forestry
355 West Boylston Street
Clinton, MA 01510

Month, Day, 201X

Dear Ms. Nystrom,

On, [INSERT DATE or DATES], I visited the [INSERT LANDOWNER's NAME / TRACT #X, / RESTRICTION ID#s] [INSERT APPROPRIATE TYPE of RESTRICTION] in [INSERT NAME of TOWN/CITY] and conducted a baseline survey.

This Baseline Documentation Report was prepared by me under contract to the Massachusetts Department of Conservation and Recreation for use and in conformity with the terms of the USDA Forest Service, Forest Legacy Program (Award #XX-XX-XXXXXXXX-XXX). The USDA Forest Service, Forest Legacy Program funded [in-part?] the acquisition of the Conservation Restriction for this property that is to be held by the [TOWN/CITY] of [INSERT NAME of TOWN/CITY].

This Baseline Documentation Report follows the Commonwealth of Massachusetts, Department of Conservation & Recreation and Department of Fish & Game Conservation Restriction Baseline Report Specifications for the Forest Legacy Program, Revised September 12, 2017.

The pages contained within this report (original and copies) have been printed on acid free, archival quality paper (list manufacturer and item/stock #).

Sincerely,

Name
Company Name
Street Address
Town/City, MA ZIP
Email:
Phone:

Table of Contents

<u>Section I:</u>
<u>Restriction Information Summary</u>

Agency-Designated Restriction ID Number(s):
Provided by Forest Legacy Program.

Agency-Designated Restriction Name:
Provided by Forest Legacy Program.

Other names for property, if applicable:
Agency/Forest Legacy Liaison may inform contractor of other names. If you know of other names by which the property is locally known, write them here. If it is not applicable, write "not applicable" – leave no blanks.

Restriction Type: Conservation Restriction / Watershed Preservation Restriction / Agricultural Preservation Restriction
Choose the one that matches what the Restriction recorded document is called. If it is called something other than the given options, write that instead.

Instrument Type: Deed / Taking
Choose the one that matches what the Restriction recorded document is called. If it is called something other than the given options, write that instead.

Property location/address:
Property address if there is one, otherwise a description of the location.

Restriction acreage by Restriction legal description/ survey / deed legal description/ GIS calculation:
The options above are in the preferred order. If the Restriction lists the number of acres, delete the other options and put the number of acres listed in the Restriction after the colon. If it does not, look at the survey. If there is no survey, look at the deed legal description, and so on, down the list. Whichever option you use, <u>cite the source</u>. Only use one option. There is no need to highlight the discrepancies among the sources.

<u>Contact Information</u>

Restriction grantor:
The original grantor of the Restriction.

Mailing address:
Telephone number:
Email address:

Note – for every entity listed in this sheet, contact information should be provided if known. If contact information is not known, write "not known". If contact information is the same as for an entity previously listed, write "same as above".

Current fee owner:

Mailing address:
Telephone number:
Email address:

Generally, this will be the same as above, so write "same" after "fee owner" and delete the contact information fields below. However, if the property has changed hands, write the new owner and their contact information.

Primary contact name:

Relationship to landowner:
Mailing address:
Telephone number:
Email address:

If same as fee owner, write "same" for contact name and delete the relationship and contact information fields below. If the legal owner is not the person who should be contacted about the property, write who should be and their relationship to the legal owner. (For example, an absentee landowner might designate the property caretaker as the primary contact.) If the fee owner is a corporation or other entity, include title as well as other contact information.

Secondary contact name:

Relationship to landowner:
Mailing address:
Telephone number:
Email address:

If there is no secondary contact, this section can be deleted.

Restriction co-holder contact name:

Relationship to co-holder:
Mailing address:
Telephone number:
Email address:

If there is no co-holder, this section can be deleted.

<u>Assessor and Registry Information</u>

Assessor's map and parcel numbers:
If there is more than one map and parcel number, write them all. If the Restriction is only on part of a parcel, explain that as well.

Restriction Registry Information

Date Recorded:
Registry:
Book:
Page:

This information should be stamped on the recorded Restriction provided by the Agency. If not, search on masslandrecords.com.

Assignment Registry Information

Date Recorded:
Registry:
Book:
Page:

This information should be stamped on the recorded Assignment provided by the Agency. If not, search on masslandrecords.com. If no Assignment was provided by the Agency, delete all of the bold above. (APRs may have an associated assignment. CRs and WPRs generally do not).

Co-holder Registry Information

Date Recorded:
Registry:
Book:
Page:

This information should be stamped on the recorded Co-holder document provided by the Agency. If not, search on masslandrecords.com. If no Co-holder document was provided by the Agency, delete all of the bold above. (APRs may have an associated Co-holder document. CRs and WPRs generally do not).

Amendment Registry Information

Date Recorded:
Registry:
Book:
Page:

This information should be stamped on the recorded Amendment document provided by the Agency. If not, search on masslandrecords.com. If no Amendment document was provided by the Agency, delete all of the bold above. (Generally, APRs have an associated Amendment. CRs and WPRs do not).

Release Registry Information

Date Recorded:
Registry:
Book:
Page:

This information should be stamped on the recorded Release document provided by the Agency. If not, search on masslandrecords.com. If no Release document was provided by the Agency, delete all of the bold above. (Generally, WPRs have an associated release document. CRs and APRs do not).

Underlying Fee Interest Registry Information

From:
To:

Date Recorded:
Registry:
Book:
Page:

This section is intended to show the deed(s) which grants title to the current owner of the underlying fee. The deed information for the grantor of the Restriction is usually recited in the document. If different than the current owner, trace title back to the deed which granted title to the grantor of the Restriction. Copy the fields above as many times as necessary, ordering the deeds by date, beginning with the most recent. If there is more than one deed of conveyance to cover the entire property, write a note below each deed's registry information explaining which part of the property is covered by the deed and any other applicable comment.

Property Description Registry Information: *Where is the metes and bounds description of the property found? If it is found in the Restriction or one of the deeds above, write "found in Restriction" or "found in deed from X to Y." If it is found in a deed not listed above, copy the fields from above and fill them in. If a metes and bounds description cannot be found, write "metes and bounds property description not found."*

Survey Registry Information
Date Recorded:
Prepared for:
Registry:
Plan Book:
Plan:

Surveys are very useful. The contractor should reference any recorded surveys of the property (or portions thereof) here, including abutter's surveys if found. Copy and paste the fields above as many times as necessary. Write a note under each block of registry information explaining what part of the property the survey covers and any other applicable information. If there is an unrecorded survey, or a survey which is included as an exhibit or appendix to a deed, note it here as well.

Are there any easements or rights of way on or over the property?
For example: a utility right of way. This information may come from deeds or plans of the property, or mentioned in the title report in Agency files. If you are not aware of any, write "none known" and delete the fields below. If there are several easements on the property, the page from the title report describing the easements can be inserted at this point instead of writing out all the details.
Details: *provide details*
From:
To:
Date Recorded:
Registry:
Book:
Page:

Copy of Recorded Restriction

Insert copy of recorded Restriction here, showing Book & Page numbers and "end of instrument" designation (such as "Attest" by Registrar).

If any Amendments to the Restriction have been recorded, include them here as well, in the same format.

Co-holders, Assignments, and Releases should not be included here.

Section II:
Maps

Map Composition:
The BDR maps will likely be photocopied in grayscale or printed in black and white from less than ideal printers. Keep this in mind when designing a map in order to keep the data represented as simple and straightforward as possible. Less is more as too much detail will not effectively communicate what the monitor needs to know. Below are some suggestions:

- Use common and easy to read typefaces
- Scale bars should be at regular intervals (ie. 50 feet, 100 feet, 1 mile)
- Use primarily black, grey and white in composing map colors
- Use simple symbols (circle, triangle, square) at different scales
- Avoid transparencies, they often do not copy or print well.

LOCUS MAP

*The purpose of the **locus map** is to show the property in the context of the surrounding landscape. It should be at a scale of around 1:50,000, as appropriate.*

This map should contain the following data layers:

- *Restriction property boundary.*
- *Other information from MassGIS or other sources:*
    - *Other protected open space (indicate property ownership)*
    - *Major Roads*
    - *Town boundaries*
    - *Water features*

Map should have:

- *Title*
- *Scale*
- *Legend*
- *List of the data source(s) for each layer*
- *Disclaimer stating, "This map is for planning purposes only, with specific points subject to verification on the ground. It is not to be used by itself for legal boundary definition."*

COLOR USGS TOPO MAP

*The purpose of the **topo map** is to show details of the property, its immediate surroundings and its topography. It should be at a scale such that the property's boundaries are near the margins of the page. If that scale is too large to show the details, the property should be shown on two or more separate pages.*

This map should contain the following data layers:

- *Restriction property boundary.*

- *Boundaries of exclusion and other adjacent unrestricted land owned by Restriction landowner. Note: boundaries that are not shared with Restriction can be approximated.*
- *Other protected open space from MassGIS Open Space layer (label with property ownership).*
- *USGS Topographic Map*

Map should have:
- *Title*
- *Scale*
- *Legend*
- *List of the data source(s) for each layer*
- *Disclaimer stating, "This map is for planning purposes only, with specific points subject to verification on the ground. It is not to be used by itself for legal boundary definition."*

COLOR ORTHO PHOTO

The purpose of the ***ortho photo map*** *is to show details of what is on the property and its immediate surroundings, including structures and tree cover. It should be at a scale such that the property's boundaries are near the margins of the page. If that scale is too large to show the details, the property should be shown on two or more separate pages.*

This map should contain the following data layers:
- *Restriction property boundary.*
- *Boundaries of exclusion and other adjacent unrestricted land owned by Restriction landowner. Note: boundaries that are not shared with Restriction can be approximated.*
- *Other protected open space from MassGIS Open Space layer (label with property ownership).*
- *Most recent Color Ortho Photo (from MassGIS).*

Map should have:
- *Title*
- *Scale*
- *Legend*
- *List of the data source(s) for each layer****, including the year of the Ortho Photo***
- *Disclaimer stating, "This map is for planning purposes only, with specific points subject to verification on the ground. It is not to be used by itself for legal boundary definition."*

ASSESSOR'S MAP

*The purpose of the **assessor's map** is to show the approximate parcel boundaries of surrounding parcels. It should be at a scale such that the property takes up about half the map and surrounding parcel lines are visible. If that scale is too large to show the details, the property should be shown on two or more separate pages.*

Note: If parcel data is unavailable in GIS form, this map can be drawn on a photocopied version of the Assessor's map from the town assessor's office.

This map should contain the following data layers:
- *Restriction property boundary.*
- *Boundaries of exclusion and other adjacent unrestricted land owned by Restriction landowner. Note: boundaries that are not shared with Restriction can be approximated.*
- *Assessor's Parcels, labeled with Map and Parcel Number.*

Map should have:
- *Title*
- *Scale*
- *Legend*
- *List of the data source(s) for each layer. If parcel data from MassGIS is used, state whether the data is Level 0, Level 2, or Level 3.*
- *Disclaimer stating, "This map is for planning purposes only, with specific points subject to verification on the ground. It is not to be used by itself for legal boundary definition."*

DRIVING DIRECTIONS MAP

*The purpose of the **driving directions map** is to allow future monitors to easily locate the property. It should show roads surrounding the property, at an appropriate scale to allow someone to follow the map. It should contain driving directions from the nearest major road or town. These driving directions should include notes about landmarks used to find the property.*

Map should have:
- *Title*
- *Indication of the source of the data.*
- *Notes about practical monitoring matters, such as the location of the property in relation to the landowner's house, where to park a vehicle, and whether the property is accessible in winter.*
- *Disclaimer stating, "This map is for planning purposes only, with specific points subject to verification on the ground. It is not to be used by itself for legal boundary definition."*

SURVEY MAP

*If **surveys** of the property are available, they should be included in the BDR here. If surveys are not available, include a page stating that no survey is available for the property.*

RESOURCE MAP(S)

*The purpose of the **resource map(s)** is to show the conditions of the property and surroundings with respect to the purposes of the Restriction. It should be at an appropriate scale to illustrate the relevant resources. If the resources cannot be shown clearly on one map, the map should be two or more separate pages. The number of maps depends on the purposes of the Restriction.*

Note: A hand-drawn map is acceptable for this map if it meets the above goals and contains the information listed below.

This map should contain the following data:

- *Restriction property boundary.*
- *Data appropriate to illustrating the purposes of the Restriction. The data layers can be obtained from MassGIS in many cases, but in some cases will need to be created. For example:*
    - *If a purpose of the Restriction is protecting habitat for rare and endangered species, Natural Heritage and Endangered Species Program data layers should be used.*
    - *If a purpose of the Restriction is protecting agricultural soils, soils data layers should be used.*
    - *If a purpose of the Restriction is protecting scenic views, a data layer showing the location of scenic views should be created and used.*

Map should have:

- *Title*
- *Scale*
- *Legend*
- *List of the data source(s) for each layer*
- *Disclaimer stating, "This map is for planning purposes only, with specific points subject to verification on the ground. It is not to be used by itself for legal boundary definition."*

MONITORING MAP

*The purpose of the **monitoring map** is to show the conditions of the property relevant to the Prohibited Uses and Reserved Rights sections of the Restriction. It should be at a scale such that the property's boundaries are near the margins of the page. If that scale* *is too large to clearly show the details, the property should be shown on two or more separate pages.*

Note: A hand-drawn map is acceptable for this map if it meets the above goals and contains the information listed below.

This map should contain data appropriate to illustrating the Prohibited Uses and Reserved Rights sections of the Restriction. You will most likely need to create this data based on the site visit, but you may be able to find some information in management plans, surveys, or MassGIS data. For example:

- *If the Restriction prohibits new structures, all existing structures should be mapped.*
- *If the Restriction prohibits new trails, all existing trails should be mapped.*
- *If the Restriction prohibits motorized vehicles, potential entrance points for motorized vehicles should be mapped.*
- *If the Restriction allows the construction of a new parking lot in a certain area, that area should be mapped.*

This map should also show whether and how the boundary is marked on the ground. Show corner markings such as iron pipes, concrete monument, and flagged trees as well as markings along the line such as blazing, stone walls, or fences.

Map should have:

- *Title*
- *Scale*
- *Legend*
- *List of the data source(s) for each layer*
- *Disclaimer stating, "This map is for planning purposes only, with specific points subject to verification on the ground. It is not to be used by itself for legal boundary definition."*

Section III:
Site Visit Report

<u>Site Visit Report</u>

*The **Site Visit Report** is a detailed, narrative description of the condition of the Restriction property as it relates to the Purposes, Prohibited Activities and Reserved Rights in the Restriction. This is the core of the BDR, and should be several pages long. **The Site Visit Report**, **Photo Documentation**, and **Maps** go hand-in-hand. Your role is to observe current property conditions on the ground. Your narrative detail should not reflect judgments or determinations about whether the observed conditions are in compliance with or in violation of the terms of the Restriction.*

When writing the Site Visit Report:
- *Be specific when describing the conditions.*
- *Use common terms, not industry-specific jargon.*
- *Reference relevant maps and photographs.*

Make sure to properly attribute the sources of your information, which may be:
- *Personal observation on the site visit.*
- *Information provided by the Agency.*
- *Landowner interview.*
- *Recorded documents.*
- *Maps, including information from MassGIS.*
- *Management plans.*

Part A: General Information

Date of inspection:

Time spent on property:

Who was present on the site visit? What was their association with the property?
List name and affiliation of all present, including contractor, Agency personnel, landowner, landowner's representatives, etc.

Questions for the landowner/representative:	**Yes**	**No**	**N/A**
Have there been any changes on the property since the Restriction was recorded?			
Do you plan to make any changes on the property in the near future?			
Are you aware of any encroachments on your property?			
Do you have any questions regarding the Restriction on your land?			
If public access is allowed under terms of the Restriction, have you encountered any difficulties?			

Describe when the landowner questions were asked:
E.g. on the phone, on site, during site visit walk.

Comments on any of the landowner's answers to the above questions or any other questions or concerns the landowner had:

Part B: Current Property Conditions

Note: This section may summarize some provisions of the Restriction. The entire Restriction must be read in order to understand its terms.

1. Conditions of the property relevant to the Restriction Purposes:

Look at the purposes in the Restriction. Describe the property subject to the Restriction with regard to these purposes, referencing relevant maps and photographs. Cite paragraph and section of the Restriction for each purpose.

For example

- *If the purpose is water supply protection, what are the water resources on the property? Reference photographs of the water resources and the map(s) that show the water resources.*
- *If the purpose is rare species protection, what are the NHESP rare species on the property? Where is their habitat? What is its condition? Reference photographs of the habitat and the map(s) that show the habitat.*
- *If the purpose is to retain the property in its "natural, scenic & open condition for habitat protection and associated public passive recreation" etc., address the public benefits cited in the Purposes section, including any relevant observations noted on the site visit.*
- *If agriculture is a purpose, what are the soils on the property? What agricultural activity has taken place in the past? What activity takes place currently? What are the plans for the future? Reference photographs of the agricultural activity and map(s) that show the location of agricultural activity and/or soils.*

2. Conditions of the property relevant to the Restriction's Prohibited and Permitted Uses:

Look at the prohibited and permitted uses in the Restriction. Describe the current condition and use of the property with regard to these uses, referencing relevant maps and photographs. Cite paragraph and section of the Restriction for each use.

For example,

- *If new roads are prohibited in the Restriction, describe any roads that exist on the property and reference photographs of the roads as well as the map that shows the road. Cite the paragraph(s) and section(s) of the Restriction that relates to roads.*

- *If new construction is prohibited or limited in the Restriction, describe the size, type, use and condition of existing buildings, structures, and improvements included within the Restriction area, including houses, sheds, towers, docks, barns, man-made ponds, roads, utilities, etc. Reference photographs of these structures and the map that shows these structures. Cite the If commercial cultivation and harvest of forest products is a reserved right, describe the forest in a general sense, including any evidence observed of past or planned harvests, and refer to management and forest cutting plans found in the appendix (if any)*
- *If any management plans are required as a condition of exercising a reserved right, comment on status of plans and include copy in appendix if available.*

3. Conditions of the Property relevant to public use:

Describe whether you saw any sign or had any reports that the public is using the property. Cite any relevant photographs or maps. Also describe what the Restriction states about public access, citing the relevant paragraph(s) and section(s), if any. To clarify, there is no need to report what the Restriction states about access by the Agency to monitor, enforce, or manage the Restriction.

4. Additional remarks regarding the present condition of the property:

If a land management issue is noted which is not relevant to the terms of the Restriction, it can be recorded in this section. For example, an infestation of an invasive species might be of interest to the Agency, even if the Restriction does not mention invasive species. It is fine to just write, "No additional remarks." *Do not leave any section blank.*

5. Recommended areas to note on future monitoring visits:

In this section, summarize in bullet form areas that should be monitored in future years. For example:
- *Roads, trails, and structures.*
- *Areas vulnerable to future encroachment (written about in more detail in Section C, below).*
- *Vulnerable natural resources noted in purposes section.*
- *Reserved rights that landowner plans to exercise in the near future.*

Part C: Boundary Conditions

1. Did the boundaries on the ground match the property boundary GIS shapefile provided by the Agency? If not, how did you locate the property boundary?

If you were given a well-researched property boundary shapefile, it is likely that the answer is a simple "yes." If you were given a provisional shapefile or a well-researched shapefile that turned out to be inaccurate, describe the additional *research you did to determine the boundary (see Specifications Section III.G. (p. 3) for more information about boundary research).*

2. Are portions of the property that are excluded from the Restriction marked or otherwise evident on the ground?

3. Describe the condition of the boundary markings at all other points (i.e. stone wall, flagged, signed, unmarked):

4. Describe the use of abutting properties, focusing on uses close to the boundary line:

5. Any other comments on boundaries?

Section IV:
Waypoints and Photographs

Waypoint and Route Map

*The purpose of the **Waypoint Location and Route Map** is to show where the Contractor walked during the site visit and the location of waypoints created. It should be at a scale such that the property's boundaries are near the margins of the page. If that scale is too large to show the details (i.e. waypoints are on top of each other), the property should be shown on two or more separate pages.*

This map should contain the following data layers:

- *Waypoints from the site visit. Waypoints at which photographs were taken should be shown with a different symbol from Waypoints at which no photographs were taken, in order to differentiate them. Waypoints at which no GPS reading was taken should still be shown on the map.*
- *Route traveled on the site visit, ideally as recorded by GPS.*
- *Restriction property boundary.*
- *A background map that shows the relevant features of the property. This could be the monitoring map, topo map, ortho photo, or other map. A hand-drawn map is an acceptable background map if it meets the above goals and contains the information listed below.*

Map should have:

- *Title*
- *Scale*
- *Legend*
- *List of the data source(s) for each layer*
- *Disclaimer stating, "This map is for planning purposes only, with specific points subject to verification on the ground. It is not to be used by itself for legal boundary definition."*

List of Waypoints and Documentary Photographs

Camera Make and Model: GPS Make and Model:
Photo Resolution (Pixels): GPS Operator:
Photographer:

Date	Waypoint Number	Photo Number	Photo File Name	Location Description	Cardinal Direction	Description of Photo Subject

The fields in the form should be filled out as follows:

- *<u>Date</u>: Date on which the photograph was taken. If no photograph was taken at this waypoint, this field should be marked N/A.*
- *<u>Waypoint Number</u>: Waypoints should begin at #1 and count up. If a GPS reading was impossible for a waypoint, it still has a waypoint number. Waypoint numbers in the chart should match the waypoint numbers on the WaypointWaypoint and Route Map and in the waypoints shapefile.*
- *<u>Photo Number</u>: Similar to the Waypoint numbers, photo number should begin at #1 and count up. These photo numbers are provided for ease of reference only. If no photograph was taken at this waypoint or if the photo taken is not to be printed (because it was taken in error), this field should be marked N/A.*
- *<u>Photo File Name</u>: This is the file name assigned to the photograph by the camera and referenced in the Baseline Photographer Affidavit. For legal reasons, the photo file name should never be rewritten, as that would be an alteration of the photograph. If no photograph was taken at this waypoint, this field should be marked N/A.*
- *<u>Location Description</u>: This is a description of the location at which the waypoint was taken, which should be a permanent or semi-permanent landmark. For example, "NW corner, intersection of stone walls.", or "20' east of intersection of stone walls." Multiple photos may be taken at a single waypoint. Any taken within +/- 30' of a single waypoint should include a reference to that waypoint in the Description of the Photo Subject (i.e. center of woods road, 30' east of waypoint 7). Beyond +/- 30' a new waypoint should be taken with associated photos referenced to it.*
- *<u>Cardinal Direction</u>: This is the direction in which the photographer was facing when the photograph was taken - N, NE, E, SE, S, SW, W, NW. If no photograph was taken at this waypoint, this field should be marked N/A.*
- *<u>Description of Photo Subject</u>: This is a written description of what is visible in the photograph. For example, "Looking forward along northern line (stone wall). Restricted area on left, neighbor's property on right." If no photograph was taken at this waypoint, this field should be marked N/A. If the photo taken is not used in the report, write "photo not used" in this column.*

Documentary Photographs

Photographs should be printed no more than 2 photos per page and captioned with the following information from the List of Waypoints and Documentary Photographs:

- *Waypoint Number*
- *Photo Number*
- *Location Description*
- *Cardinal Direction*
- *Description of Photo Subject*

Each page of printed photographs should have a heading that includes the photographer's name and the date on which the photographs were taken.

Photographs that do not show the condition of the property (blurry photographs, for example) should not be included in this section of the BDR. However, all photographs should be included, unaltered, on the BDR CD/DVD (see Specifications Sections IV.B., p. 5 and VI.C., p. 12).

Section V: Affidavits

BASELINE PREPARER AFFIDAVIT

The undersigned hereby certifies 1) that acting in my capacity as [employee/contractor] *pick one* of *Agency Name* I prepared the accompanying Baseline Documentation Report dated *Date of site visit*, describing the *Restriction Name* Property located in *Town* 2) that the Report describes and documents the natural and other resources of the Property protected under a [Watershed Preservation/Agricultural Preservation/Conservation Restriction] *pick one* recorded in the ________ County Registry of Deeds in Book _____ at Page _____ on *Recording Date*, and 3) that based on all the information cited in said Report and to the best of my knowledge and belief, the Report is an accurate representation of the Property and its condition as of the date of the Report.

Notwithstanding the above, the undersigned agrees that the conditions documented in the Report do not necessarily constitute the entirety of conditions of the Property allowed or required by the [Watershed Preservation/Agricultural Preservation/Conservation Restriction] *pick one*, and that *Agency Name* in no way waives any rights, in law or equity, to enforce any provisions of the [Watershed Preservation/Agricultural Preservation/Conservation Restriction] *pick one*, whether or not directly addressed in this Report.

Signed and sealed under the pains and penalties of perjury this ___ day of _____, 20__

By:________________________________

Name

On this __________ day of _____________, 20___, before me, the undersigned notary public, personally appeared *name of the document signer*, proved to me through satisfactory evidence of identification, which were *type of ID presented*, to be the person who signed the preceding or attached document in my presence, and who swore or affirmed to me that the contents of the document are truthful and accurate to the best of [his/her]*pick one* knowledge and belief.

SEAL

____

Signature of Notary Public

____

Printed name of Notary Public

My Commission expires: ________________

BASELINE PHOTOGRAPHER AFFIDAVIT

The undersigned hereby certifies that acting in my capacity as [employee/contractor]*pick one* of *Agency Name* on *Date of site visit*, I visited the *Restriction Name* Property located in *Town* and took documentary ground photographs ("the Photographs"), with photo file names, ____ through ____ , and 2) that the Photographs, attached hereto, together with accompanying descriptions, List of Waypoints and Documentary Photographs, and WaypointWaypoint and Route Map, fairly and accurately depict the property as it appeared on the date the photographs were taken.

Signed and sealed under the pains and penalties of perjury this ___ day of _____, 20__

By:________________________________
Name

On this __________ day of _____________, 20___, before me, the undersigned notary public, personally appeared *name of the document signer*, proved to me through satisfactory evidence of identification, which were *type of ID presented*, to be the person who signed the preceding or attached document in my presence, and who swore or affirmed to me that the contents of the document are truthful and accurate to the best of [his/her] *pick one* knowledge and belief.

SEAL

____
Signature of Notary Public

____
Printed name of Notary Public
My Commission expires: _________________

ACKNOWLEDGMENT OF BASELINE CONDITIONS

The undersigned, being the [grantor/successor] *pick one* [owner/owners] *pick one* of the *Restriction Name* Property located in *Town*, subject to a [Watershed Preservation/Agricultural Preservation/Conservation Restriction] *pick one* recorded in the ________ County Registry of Deeds in Book _____ at Page _____ on *Recording Date*, hereby [certify/certifies] *pick one* to *Agency Name* that the accompanying Baseline Documentation Report, dated *site visit Date* is, to the best of [my/our] *pick one* knowledge and belief, an accurate representation of the Property and its condition on this date.

Notwithstanding the above, the undersigned [agree/agrees] *pick one* that the conditions documented in said Report do not necessarily constitute the entirety of conditions of the Property allowed or required by the [Watershed Preservation/Agricultural Preservation/Conservation Restriction] *pick one*, and that *Agency Name* in no way waives any rights, in law or equity, to enforce any provisions of the Watershed Preservation Restriction, whether or not directly addressed in this Report.

Executed under seal this ___ day of _____, 20__

By: _______________________________
Signature of [Grantor/Successor] *pick one*

____
Print Name

Add as many signature lines as there are owners. Add "Title" line for corporate or other entity owner

Acknowledged by:
Agency Name

By: _______________________________
Signature of Agency Representative

____
Print Name and Job Title

Section VI:
Appendices

Note: Include only the relevant appendices, listing them in the table of contents with correspondingcorresponding page numbers. Each appendix included should have a heading with the title of the appendix. Appendices should appear in the following order:

Contractor's Qualifications

Clearly identify author(s). Note lead author and what roles each person performed. List each contributor's qualifications. A resume or CV can be inserted at this point.

If the BDR Author was an Agency employee, this Appendix should not be included.

Restriction History and Chronology

As provided by Agency/ Forest Legacy Liaison or FLP Partner.

Property Deed Copy

Most recent deed as of date of report delivery showing current fee owner as grantee – use copy downloaded or obtained at Registry showing Book & Page numbers and "end of instrument" designation.

Landowner Contact Log

Record all contact with the landowner. For each contact, include:

- *Date*
- *Method of Contact (i.e. phone, email, in person)*
- *Person Contacting (e.g.. contractor, landowner, landowner's agent)*
- *Person Contacted (e.g. contractor landowner, landowner's agent)*
- *Summary of Contact (e.g. Landowner Letter sent)*

The following form can be used:

Date	Method	Person Contacting	Person Contacted	Summary of Contact

Landowner Correspondence

Include copies of correspondence and emails with landowner and/or landowner's agent that are directly relevant to the preparation of the baseline report.

Waypoints Attribute Table

Printed from the waypoints shapefile. This is the .dbf file from the shapefile.

Management Plans

As relevant to the provisions of the Restriction, include copies of management plans for the property. See Specifications Section III.D. (p. 3) for instructions on obtaining management plans. The appendix should describe contact with relevant Agency personnel and landowners that led to obtaining or not obtaining management plans.

Examples of management plans:

- *Forest Stewardship Plan*
- *Forest Management Plan*
- *Forest Cutting Plan*
- *NRCS Farm Conservation Plan*

If no management plans were provided or found; or management plans are not relevant to the purposes of the Restriction, the Appendix should consist of a note as to why no management plan is included. This Appendix is never omitted.

Natural Heritage Program Rare Species Information

Will be provided by Agency or FLP Partner, if relevant to the purposes of the Restriction. The "MA FLP BDR NHESP form" completed by the NHESP must included in the BDR in order for the BDR to be considered complete. Please see blank MA FLP BDR NHESP form posted on the MA DCR Forest Legacy Program web page.