

**Southern Wisconsin Bird Alliance, Inc.  
Land Project Assessment Form**

The *Land Project Assessment Form* is required as part of the initial screening process when SoWBA considers the acceptance of a land or easement donation or land purchase. Projects shall follow the process described in the *Land and Easement Acquisition Policy*, Section III.A. Project Approval Process.

**I. PROPERTY SUMMARY**

A. **Project/Property name:**

B. **Acres:**

C. **County:**

D. **Is the property within SoWBA chapter boundaries?**     Yes         No

E. **Location: *Township:*                      *Range:*                      *Section:***

F. **Tax Parcel #(s):**

G. **Landowner:**

H. **Contact Information:**

I. **Date of initial contact with landowner:**

J. **Staff member handling initial contact:**

K. **Details of how contact made:**

L. **Project acquisition type:**

a. **Choose one:**     Easement         Fee title ownership

b. **Choose one:**     Donation         Purchase

c. Add additional comments, if necessary:

M. **Landowner's intentions (if any), details about negotiations, restrictions, timing issues, any facts about the landowner and the land:**

N. **Conflict of Interest (real or perceived), if any, and plans to manage the possible conflict:**

O. **Project Description (discuss overall quality of parcel, conservation values in general terms):**

**P. Is property enrolled in a government program or any other management type programs (for example, Managed Forest Law, Conservation Reserve Program, Wetland Reserve Easement program)?**

Yes       No

If yes, describe:

**Q. Map or Photos attached?**  Yes    No

**R. Site Inspection Form Completed?**  Yes    No

## **II. PROJECT SELECTION CRITERIA ASSESSMENT**

**A. How will the project restore, protect or preserve habitat?**

**B. Is the property in a natural state or does it contain rare or significant natural features, wildlife habitat, or natural communities (e.g., prairie, savanna, wetlands)?**

Yes       No

If yes, describe:

**C. Does the property contain species that are federal or state endangered or threatened, or “species of concern” as defined by Wisconsin DNR?**

Yes       No

If yes, list species:

**D. Does the property provide a connection or land corridor that is important for movement of wildlife between habitats?**

Yes       No

If yes, describe:

**E. Will the project restore, protect or preserve water or geological resources?**

Yes       No

If yes, describe:

**F. Will the project benefit a larger regional conservation goal (e.g., WDNR’s Glacial Heritage Area, Important Bird Area, State Natural Area)?**

Yes       No

If yes, describe:

**G. Is the property within an existing sanctuary boundary, or located adjacent to or in the immediate vicinity of lands already under protection by Southern Wisconsin Bird alliance, any other non-profit or land trust, or county, state, or federal agency?**

Yes       No

If yes, describe:

**H. Does the project have aesthetic, archeological, cultural, or historical value?**

Yes       No

If yes, describe:

**I. Will the property be accessible for public use?**

Yes       No

If yes, describe anticipated permitted/prohibited public uses activities:

**J. Is the property adjacent to other public lands?**

Yes       No

If yes, list those properties and include any permitted/prohibited activities:

**K. Will the project provide opportunities for research?**

Yes       No

If yes, describe:

**L. Will the project provide opportunities for environmental education (e.g., public, interns, school groups)?**

Yes       No

If yes, describe:

**M. Will the project provide opportunities for recreational use (e.g., bird watching, hiking, photography)?**

Yes       No

If yes, describe:

**N. How will the project provide opportunities for public outreach/awareness, including opportunities to create a greater awareness of the benefits of habitat restoration, protection and preservation?**

**O. Will the project enhance local and regional eco-tourism and/or economic opportunities?**

Yes       No

If yes, describe:

**P. For transactions benefitting from tax deductions, IRS regulations require that at least one of the following must apply to the land in question. Check all that apply. If #3 only applies, SoWBA staff are required to review the public good benefit.**

1. The project will provide for land areas for outdoor recreation by, or the education of, the general public;

2. The project will protect a relatively natural habitat of fish, wildlife, or plants, or

similar ecosystem;

3. The project will preserve of open space (including farmland and forest land) where such preservation is a) for the scenic enjoyment of the general public, or b) pursuant to a clearly delineated federal, state, or local governmental conservation policy, and will yield a significant benefit;

4. The project will preserve a historically important land area or a certified historic structure.

**Q. Does the project carry undue risks or known threats?**

Yes       No

If yes, describe and include documentation:

**III. PRELIMINARY FINANCIAL ASSESSMENT**

**A. Does this project involve a donation or partial donation by the landowner?**

Yes       No

**B. If this project involves a purchase:**

What is the estimated purchase price: \$

Detail of the funding status for this project:

Check all the grand funding sources that apply:

Stewardship Fund     NAWCA     Other:

Other than grants, explain any potential funding or income sources and funding strategies for this project:

**C. Other than purchase price, what are the estimated costs to the organization with regards to completing this project?**

- Appraisal: \$
- Survey: \$
- Legal fees: \$
- Title Insurance \$
- Transfer fee: \$
- Closing fee: \$
- Staff time: \$
- Baseline docs: \$
- One-time stewardship costs: \$
- Annual stewardship costs: \$
- Other: \$

**Total organizational costs (including estimated purchase price): \$**

***SoWBA Acquisition and Management Calculator worksheet attached (required)***

**IV. OTHER CONSIDERATIONS**

**A. What is the potential impact of this acquisition on SoWBA's public image?**

**B. Are there any other organizations, units of government, mechanisms or programs that may be better suited for the protection of this property?**

Yes       No

Comments:

**C. Does the landowner appear to be motivated by dubious financial benefits?**

Yes       No

Comments:

**D. Is there reason to believe that the land would be unusually difficult to manage? (i.e., incidence of destructive trespassing, prescribed burn challenges, herbicide drift)**

Yes       No

Comments:

**E. Is there a reasonable possibility that the property's conservation or scenic integrity would be significantly eroded by future development activities on adjacent lands?**

Yes       No       Unknown

Comments:

**F. Describe any formal and informal agreements for use of the land by third parties such as leases, severed mineral rights, right-of-ways, easements, informal understandings etc.**

**V. RECOMMENDATION**

- Sanctuaries/Land Protection Committee has passed a motion and recommends the project for consideration by the board
- Sanctuaries/Land Protection Committee DOES NOT recommend the project for consideration by the board

Summary of Recommendation:

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*Land Project Assessment Form Approved by the Board of Directors on April 3, 2017.*