



Annotated Baseline Documentation Report (BDR) Template for Natural Heritage Lands Owned by a Land Trust

This Annotated Baseline Documentation Report (BDR) Template was prepared by the request of the Ontario Land Trust Alliance (OLTA). This report was also prepared in conjunction with the Ontario Land Trust Assistance Program (OLTAP). Since 2002 OLTAP has granted tens of thousands of dollars to Ontario land trusts to help secure properties of ecological interest. This document has been reviewed by the OLTAP Committee and is being endorsed as a recommended approach to preparing Baseline Documentation Reports for land trust owned properties.

This report is intended to provide recommended guidelines to those applying for funds from the OLTAP program and may also suit the general needs of Ontario land trusts as the basis for a Baseline Documentation Report (BDR) for lands owned by land trusts. Annotated comments are included in text boxes and are intended to guide the user when filling out information data fields.

Disclaimer

This material is designed to provide accurate, authoritative information in regard to the subject matter covered. It is provided with the understanding that the Ontario Land Trust Alliance (OLTA) is not engaged in rendering legal, accounting, or other professional counsel. If legal advice or other expert assistance is required, the services of competent professionals should be sought.

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SECTION 1 Annotated Baseline Documentation Report (BDR) Template for Owned Properties

This Baseline Documentation Report has been developed as a guideline of recommended information fields for land trusts and conservation organizations to include. The text boxes under each section are there for formatting purposes and do not have to be kept in your working copy.

Property:

Name of Property

Date of Site Visit(s):

Month, day, year. May take multiple site visits.

BDR Prepared by:

Name of person(s) who prepared the BDR.

BDR Summary:

This is a helpful addition to the BDR, especially if the document ranges from 20-30 pages including maps, ground and aerial photographs. The summary can highlight the importance of the baseline report and the purpose of protecting the property i.e. the conservation values/natural features being protected on the property.

GENERAL PROPERTY INFORMATION

1. Property Information

Type of Agreement:

Indicate whether fee simple donation, purchase, split receipt, and whether the property is an Ecological Gift under Environment Canada's Ecological Gift Program and the assigned Ecological Gift Reference Number. Also indicate other details such as life interest or lease agreements.

Property Address:

The street address of the property

Legal Description:

A description of the property as indicated on the title deed. Lot and concession numbers etc;



Location (latitude, longitude):

UTM Reference:

Zone, Easting, Northing

Surface Area (acres and hectares):

Approximate or as noted by legal survey

Directions to the Property:

Provide driving directions to the property from nearest major centre.

Access Details for the Property:

Provide any information about point(s) of access to the property, whether by foot or car etc.

Aerial Photo Numbers:

Reference with Year – Roll – Flight Line – Numbers – Scale

Official Plan Land Use Designation(s):

Zoning of Property:

Maps:

National Topographic System (NTS) maps (1:50,000) and Ontario Base Maps (OBMs) (1:10,000) can be used here to illustrate where the property is situated in the context of the landscape. These maps typically show broad patterns of forest cover, rivers, streams, elevation, roads, buildings and other features. Information relating to property specific mapping will be discussed in subsequent sections of this report.

- *[National Topographic System Map from NRC]*
- *[Ontario Base Map from MNR]*

2. Site Description, Ecosystems and Habitats

Site Description:

Include a description of the property including topography and natural features as well as reasons why the property is being protected.

Site Designations :

Indicate whether the property has any ecological significance, and if the property is part of any special designations (e.g. local Environmentally Sensitive Areas (ESAs), Areas of Natural and Scientific Interest (ANSIs), Provincially Significant Wetlands (PSWs) or conservation planning initiatives that may be on a local, regional, provincial scale. If the property is donated through Environment Canada's Ecological Gift program, list Ecological Sensitivity Criteria as qualified by Environment Canada.



Habitat Characterization :

General vegetation communities, habitat types or natural area information can be listed here. For more detailed Vegetation see Section 1, Part.8.

Other Ecological or Heritage Values:

Include information on whether the property is a buffer, corridor, has archaeological or scenic value.

Land Uses:

Historic use:

What past uses have occurred on this property? This may lead into a more detailed environmental audit.

Adjacent land use:

Identify the land use of each adjoining property, indicated by direction. Indicate whether these lands or neighbouring uses pose any threat to the property.

Current use:

Specify land use by checking the following boxes and add description including whether activity is occurring with permission or via trespassing, details of how long the land use has been occurring and a description of any damage that it is causing. Include photos for documentation purposes and locate on property map.

Recreational:

Activity	Occurring (Y/N)	Details/Comments
Hiking/walking		
Berry Picking, Other Harvesting		
Bird Watching		
Picnicking		
Camping		
Agricultural		
Hunting		
Fishing		
Four-Wheel Driving		
ATV Use		
Trail Riding (horse)		
Snowmobiling		
Cross-country skiing		
Swimming		
Cycling		
Other(s):		



Additional detail:

Is public access allowed?

Y/N

Details:

<i>Is permission required before access? Who is the contact for permission? Where are the points of access?</i>

Scientific/Educational (research, nature study, etc.):

Habitat/Ecosystem Management or Preservation (planting, bird houses, etc.):

Residential (permanent or seasonal residences, mobile homes, etc.):

Agricultural (orchard, vineyard, garden, horse/cattle pasture, etc.):

Forestry (reforestation, harvesting, etc.):

Commercial (sales to the public, etc.):

Industrial (aggregate, mining, etc.):

Sections adapted from LTA BC, 2001 – Volunteer Guide to Stewardship Agreements



3. Property Structures, Developments and Constructed Features

Describe purposes of each and location on property, using a baseline map. Include photos for documentation purposes and locate on property map.

Buildings/Structures:

Trails & Roads:

Wells & Septic:

Fences:

Power lines:

Pipelines:

Other:



4. Disturbances & Potential Threats to Site

The following table lists disturbances already noted (o), as well as additional uses that can be anticipated to merit a particular management strategy (x) because of their nature or noted frequency of occurrence:

Vegetation /Animals	<input type="checkbox"/> o <input type="checkbox"/> x	Removal of Resources	<input type="checkbox"/> o <input type="checkbox"/> x	Vandalism/ Liability	<input type="checkbox"/> o <input type="checkbox"/> x	Trails/Roads/ Cutlines	<input type="checkbox"/> o <input type="checkbox"/> x	Natural Processes	<input type="checkbox"/> o <input type="checkbox"/> x
Tree Cutting		Sand		Garbage/litter		ATV/Snowmobiles Trails		Landslide	
Bark Stripping		Gravel		Signs or lack of		Roads		Flooding	
Collecting Plants/Animals		Peat		Structural damage or poor condition		Hiking Trails		Fire	
Hunting or Trapping Animals		Water		Campfires		Equestrian Trails		Other Disturbances (describe):	
Invasives		Other Disturbances (describe):		Swing Ropes (for diving, swimming, etc)		Cutlines/ Seismic			
Use of Pesticides or Herbicides				Steep Cliff Faces		Fence lines			
Grazing				Mountain Bike Jumps & Ramps		Pipelines/ Wellsite			
Tree Plantation				Other Disturbances (describe):		Power Lines			
Beaver Cutting/Flooding						Trail Erosion			
Other Disturbances (describe):						Drainage Ditches			
						Other Disturbances (describe):			

Table adapted from LTA BC, 2001 – Volunteer Guide to Stewardship Agreements

Additional detail:

Provide any additional detail, based on the table above, including details on frequency of event, severity etc.



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5. Water

Interior water course/body:

Identify any water features with name, type (e.g. pond, lake, stream, river, wetland type, vernal pool), approximate size or distance with directional description of its location within the property and direction of flow; whether location is upstream or downstream of other activities; whether ephemeral or year-round; specify if constructed or natural. Describe the condition of banks or shorelines. Are they stabilized? Vegetated?

Ecological Land Classification can be used as a designate for describing aquatic ecosites. For land trusts working in Southern Ontario, the ELC reference to use is the Ecological Land Classification for Southern Ontario (Lee et al., 1998). (See Section 1, Part 8 for more information on ELC).

6. Geology & Soils

Ecological Land Classification (ELC) for Southern Ontario (Lee et al., 1998) may be used to provide additional information on soil substrate types, moisture regimes, soil texture, rock type and soil drainage (see Section 1, Part 8 for more information on ELC).

a). Surficial & Bedrock Geology

Identify surface and underlying geology.

b). Soils

Identify soil series, soil survey and list significant soil properties – saline/nonsaline, texture, drainage, permeability, suitabilities. ELC may be referred to for additional information on soil substrate (see 1.9 Vegetation for more information on ELC).

7. Wildlife and Wildlife Habitat

Evidence of Wildlife:

Wildlife/Trees/Snags/General		Animal Tracks		Animal Scat	
Squirrel or Mast Caches		Types of Animal Tracks:		Types of Scat:	
Bird's Nests					
Feathers					
Burrows					
Browsed Vegetation					
Other:					

Table adapted from LTA BC, 2001 – Volunteer Guide to Stewardship Agreements

Additional detail:

Provide any additional detail, based on the table above.



General description of habitats and ecological systems:

Current habitat for what terrestrial/non-terrestrial species and groups? Habitat for migrating species?

Wildlife observed on property:

List below any wildlife that has been observed on the property and the date of observation. Note that this list does not replace having a detailed Bio-Physical Inventory of the property at a later date, if deemed necessary by the land trust.

List common name followed by scientific name of each.

Birds:

Mammals:

Reptiles/Amphibians:

Insects and Spiders:

Fish/Aquatic Invertebrates:

Endangered, threatened, rare and significant species:

Specify, if any, along with Biodiversity Rankings for each species

8. Vegetation

Description of habitats and ecological systems:

Describe current habitat types (vegetation community types) and ecological systems.

List below any observed species of trees, shrubs, forbs & grasses, including threatened, endangered, or rare species, invasive species as well as the date of observation. Note that this list does not replace having a detailed Bio-Physical Inventory of the property at a later date, if deemed necessary by the land trust.

Ecological Land Classification can be used as a designate for describing vegetation as it provides a classification system for identifying vegetation community types. Additional information is also provided on soil types and moisture regimes. For land trusts working in Southern Ontario, the ELC reference to use is the Ecological Land Classification for Southern Ontario (Lee et al., 1998).

Plants:

List common name followed by scientific name of each. Indicate which species are invasive or non-native.



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Trees =

Shrubs =

Forbs =

Forbs are non-woody or non-grass like plants.

Grass/Sedge =

Fungi =

Endangered, threatened, or rare species:

Specify, if any, along with Biodiversity Rankings for each species

9. Conservation Goals

Describe any conservation goals for the property or make reference to other reports, strategies that may be relevant (e.g. Managed Forest Plan, Species Recovery Plans etc).

10. Concluding Remarks and Recommendations

Conclude with any pertinent comments and indicate plans, timelines for any future work (stewardship or otherwise) which may add to or impact this report. Also, give recommendations for future visits such as monitoring for recreational use, prohibited activities to watch for, sensitive natural features, and the presence/distribution of invasive species.

11. Important Contacts

For each and where relevant identify a contact person's name, title, phone number and organization.

Municipality:

Conservation Authority:

Other Local Entities:



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Ministry of Natural Resources:

Other Provincial Entities:

Environment Canada:

Other Federal Entities:

Neighbours:

12. Lists of Potential Maps, Photos or Data Sheets Attached to Master Copy of Report

List below the attachments which can include, but may not be limited to the following. Ensure that these attachments are referenced in the report, as necessary, and in fact attached to the document.

Exhibit A: Registered Survey of the [NAME OF] Property

Exhibit B: Legal Description of the [NAME OF] Property

May want to attach a copy of the registered title deed

Exhibit C: Zoning Schedule for the [NAME OF] Property (from the Municipality)

Exhibit D: Ortho photography of the [NAME OF] Property

Photo should be labeled with date of imagery, scale, direction arrow and other pertinent information

Exhibit E: Ground Photos of the [NAME OF] Property

Each photo should be labeled with date, description of photo reference site including direction of photo (via compass and/or GPS coordinate), name of photographer, details of equipment used as well as a unique identifier so that in the future photos (digital, negatives and/or hardcopy) can be retrieved from files if necessary. It is also recommended to include a map of photo reference sites for future photo monitoring.



Exhibit F: Property Map Showing Natural Features & Description

A map of the property showing boundaries of ANSIs, ESAs, PSWs etc

**Exhibit G: Summary Life Science Checklist & Description or Natural Areas Report
(From MNR Natural Heritage Information Centre (NHIC) Website)**

Other Attachments as Necessary:

E.g. Surficial Geology Map, Soil Map, Highway Location Map, Tree Planting Plans, Management Agreements, Leases etc.



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