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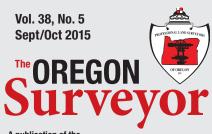


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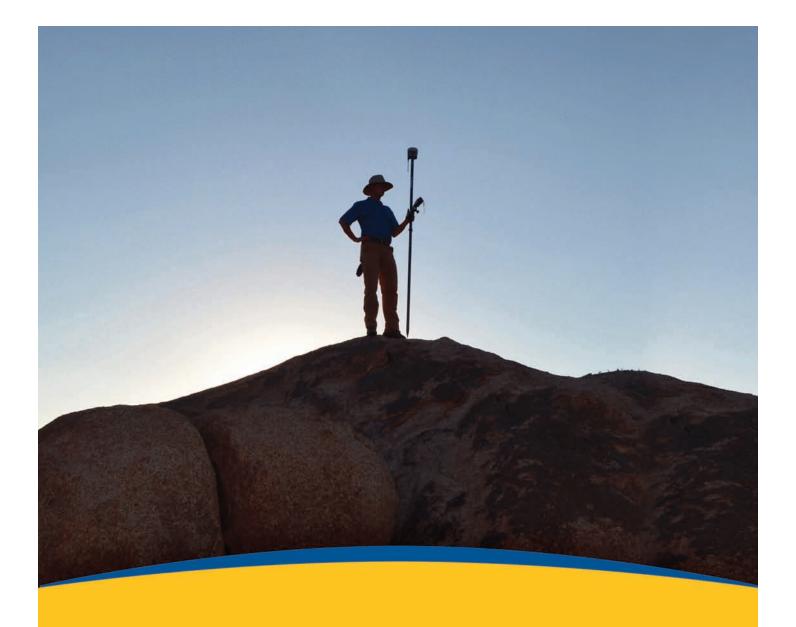
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## Seasoned

■ Greg Crites, PLS

ll, the picture of the GLO bearing tree from 1872 that graces our cover brought a smile to my face. Throughout my lengthy career, I've had many opportunities to find old bearing trees, though the most memorable ones involved a great deal more scrutiny to verify their origin and antiquity. The subject of bearing trees always brings a flood of memories into my head—some better than others—but thanks to Aimee, she threw me a curve that I simply had to swing at. Though I was unaware that we're in the home stretch toward the World Series until last Sunday and haven't watched one minute of baseball this year, Aimee's comments served up a fertile field of ideas for my editorial.

Thanks, Aimee!

You see, I'm now considered a "seasoned" member of our profession. Yep, just like that old tree on the cover, a little gnarly, a little twisted, some decay, a bit lumpy, some evidence of physical injury and a lot of history. There is one inalienable fact about me though that no one can take away. All those "stripes" have given me enough ammunition to write a few things about our profession, drawing entirely

from personal experience. The reader will very likely notice that there is so much content in this

If you want to capture the interest of a young "sapling" who is considering coming into this profession, tell them a story.

issue that can be directly attributed to me that it wouldn't be a big stretch to say that this is *my* issue! Half of that isn't my fault so if you wish to point fingers, just remember that at least three of yours are pointing back at you! If you want to know the entire story about why so much of my writing appears in this issue, you can take it up with Lisa Switalla if and when you see her at the conference in January. If you wish to complain, I'd suggest you write your own article for publication so that when this magazine needs content, we can draw from a multitude of sources!

Now, back to the old bearing tree. If you want to capture the interest of a young "sapling" who is considering coming into this profession, tell them a story. Don't tell them about the ebb and flow of opportunities for work in our field because that's not going to change until we do something to convince the consuming public that the work we do should not be commoditized and has a great deal more importance than any of them have been led to

believe. My article on title insurance is meant to bring up this concern as it relates to an industry that could rely a lot more on our services to

that could rely a lot more on our services than they do, more so now than in the past.

The popularity of first person shooter video games should be some indication of how we might appeal to those considering surveying as a career path. I know I'm dating myself but one of my all time favorite games was Turok on our old Nintendo 64! The basic premise of the game involved moving around in a digital world hunting dinosaurs. As you accumulate experience, study the geography of each level, figure out the locations of special weapons and learn how to respond to the different sounds indicating the approach of predators, your skills increase while you advance and kill more fearsome dinosaurs and ultimately other enemies who appear to be some imagined variation on indigenous people. The fallacy of all this is that it's unlikely that homo sapiens and dinosaurs could coexist, ergo why are they extinct and we're here (at least so far)? The horror of "Jurassic Park" should tell you that!

The parallels with our profession are striking. As you move along the career path you become more adept at interpreting evidence, understanding the nuances of property descriptions, recognizing the strengths and weaknesses of records of survey filed by others, the value of narratives and so on. What we need to do is transmit the enthusiasm these skills instill in us to those considering land surveying—the question is how to package the product in a way that promises the potential candidate a view beyond the hurdles of acquiring the education and experience and focuses on the outcomes. After all, most of you who have had the experience can attest to the deep satisfaction derived from solving a complicated boundary resolution that results in the discovery of irrefutable original evidence! •

The views expressed herein are mine and mine alone and in no way should be construed as representing ANY opinions shared by our membership or a stance on political issues by this organization.

## Eugene or bust

■ John Thatcher, PLS; 2015 State Chair

To t's time to mark calendars and plan for the 2016 PLSO Conference. We have a theme, logo, venue, keynote speaker and presenters, and we have our fabulous vendors. Much of this accomplishment is because we have a dedicated, hardworking Conference Committee. Having attended several of the committee meetings, I can only stand in awe before this gang and the work they do to put the conference together. A thankless job? Not quite. Let me publicly and loudly thank our Conference Committee right here and now. Now get back to work.

Speaking of conferences, I may be attending another one in 2016. The Western Federation of Professional Surveyors (WFPS) is negotiating an MOU (memorandum of understanding) with the Nevada society (NALS) for a joint conference. There will be a WFPS board meeting to attend, and as a PLSO delegate to WFPS, I will be in town. So I might as well stick around an extra day or two, represent PLSO, rub elbows with Nevadans and pick up a few PDHs.

On the Cover • Pat Gaylord, PLS





This Oak Bearing Tree near Tygh Valley, Oregon, was scribed in September 1872 during the survey of T3S R12E, W.M. The tree was 28" in diameter and noted as a White Oak at the time it was scribed by William Campbell. In October 1965 this tree was recovered by James Jelly\* during the remonumentation of this corner and was noted as a 29" Oak with an open decayed blaze with no marks visible. Today the tree is dead and hollow, but still standing as a monument to the corner for Sections 20-21-29-28. What a great example of our history.

\*Editor's note: James Jelly, is also known as Jake Jelly, the same man that PLSO member, Bob Taylor repeatedly refers to in his series of published articles, "Cadastral Tales." Bob and Jake worked on a crew for Al White in their early career! Serendipity?

I attended an interesting meeting on Sept. 30 at the state Capitol. The meeting, coordinated by the House Committee on Business and Labor,



was an informal work group to explore the possibility of requiring hydrographers practicing in Oregon to be registered through OSBEELS. PLSO was represented by Legislative Committee Chair Dave Williams, Past Chair Lee Spurgeon, Exec. Secretary Aimee McAuliffe (via teleconference), Lobbyist Darrell Fuller and myself. Others attending included four OSBEELS board members, ACEC, Rep. Paul Holvey and, of course, hydrographers. The photogrammetry industry was also represented, as one of the OSBEELS board members is a photogrammetrist. That was fortunate because he provided insight into the process of getting a profession recognized and registered with OSBEELS. I came away from the meeting with two main impressions. One, many hydrographers feel that there is no designated path to professional status and that the job leads to a dead end professionally. They are in favor of regulation but aren't interested in boundaries and being required to become a PLS. However, they do desire to be recognized as professionals. Two, there is disagreement among hydrographers (and a lively debate among professional surveyors) as to whether hydrographers should also be professional surveyors, or at least do their work under the supervision of a PLS. This is not the place to expound on the issues, though there are many. It may be the beginning of a long journey for hydrographers in Oregon, with national and international repercussions. I will be watching with interest as this story unfolds.

The next PLSO Board Meeting is Nov. 21, and in some ways, it's crunch time. New chapter officers need to be in place, nominees need to be identified so the board can vote in the next chair-elect and nominations for awards need to be turned in beforehand. Read Aimee McAuliffe's message in this issue for insight into volunteering. Concerning awards, Aimee has made it a snap to download the fillable PDF from the PLSO website. So scan through this year's *Oregon Surveyor* magazines and nominate an Article of the Year. Look around at your next chapter meeting and nominate a brush cutter, someone with a hidden talent, that guy or gal who makes you laugh, the one with a bright idea, the team player, etc. Have fun with it. Send your nominations to Awards Committee Chair John Voorheis at johnvoorheis@grantspass.com.

See you in Eugene. •

SAVE THE DATE

2016 PLSO Conference • January 20–22 • Hilton Eugene

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## Member driven management

■ Aimee McAuliffe, PLSO Exec. Secretary

i'm assuming it's not a secret, but just in case—PLSO is a member driven association. What does that mean? It means we are run by a volunteer leadership board—Board of Directors—which consists of each Chapter's President and President-elect. It means we have committees that

prioritize projects that answer to the mission of the organization. It means decisions regarding what, how or when PLSO contributes and participates in its professional community is up to its volunteers.

It means, I don't act alone on anything. I work with the Chairman of the

Board. I attend committee meetings and try to provide "the big picture" for

to provide "the big picture" for committee members to make a decision.

So what happens when people stop volunteering? I'm assuming that's not a secret, but just in case—PLSO can't exist without its volunteers. It means we stop actively participating in our professional community. It means we no longer have a collective voice to be heard above all other voices.

Right now, we need your voice. PLSO is at a pivotal time. We strive to find a balance between serving the needs of our more seasoned members with those of the upcoming generation. Both have different expectations in regards to communication, volunteerism and networking. It would be easy for one side to casually dismiss the other. However that's not ideal for our community. For one, the seasoned workforce needs to hire well-qualified entry-level employees with a full grasp of changing technology. Student and associate members should be able to see PLSO as a way to meet potential employers face-to-face. But that's really a given isn't it?

Without knowing how to react and respond to future members, we will become obsolete. Where PLSO is falling short is getting younger members involved in governance. Where does it say that one has to be a department director or owner to volunteer? What is required is motivation and enthusiasm. You aren't required to have all the answers—only that you ask the question and not be afraid to present new ideas. Some may say, "But that's not how we've always done it." Innovation isn't always seen as being particularly innovative by others until it works. But if you don't try, how will you have the opportunity to say, "I told you so."

» continues on page 7



Q: What's just as important to a surveyor as technical accuracy?

A: Quality professional liability insurance to cover potential inaccuracy

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## Western Federation of Professional Surveyors MEETING REPORT: October 10, 2015 • Sea-Tac, WA

#### WFPS AREAS OF FOCUS:

#### **Developing and Maintaining Programs to Promote the Profession**

WFPS is committed to promoting the land surveying profession. To that end, WFPS is currently developing the following programs:

#### • Youth Outreach—Land Surveying as a Career

- ✓ WFPS has budgeted funds to developing an after school/ community program. The program will include 10 hours of curriculum that can be used by state associations and their chapters to promote land surveying as a career. The initial outline of the program is complete. More information will be available regarding this program in January. If you are interested in serving on the committee that is developing this program, please contact the WFPS Executive Office at (707) 578-1130 or admin@wfps.org.
- ✓ Continuance of the Teaching with Spatial Technology (TwiST) program which provides teachers with resources to promote land surveying within their classroom. All state associations are welcome to participate in this once a year event. The 2016 TwiST program will be held the third week in June. All state associations are welcome to sponsor teachers to this training. Deadline for registration is March 31, 2016.

#### • Public Awareness—Elevator Pitch Contest

✓ An Elevator Pitch is a short summary (no more than 45 seconds) used to spark interest in the profession. WFPS

#### » MEMBER DRIVEN MANAGEMENT, from page 6

If you are a supervisor, please take a moment to ask how you will get the younger generation involved in making decisions about their professional community. How are you helping make PLSO home to new people? If you're a student or associate member, ask yourself how to lend your voice to help cultivate the future.

On Nov. 21, the PLSO Board will meet in Salem for its Fall Quarter meeting. We are discussing outreach and scholarship, voting on award recognition for the 2016 Conference in Eugene this coming January, as well as selecting a PLSO Chair-Elect. Chapters are currently looking to fill their leadership roles before this meeting. Please contact me, John Thatcher or your local chapter president (emails are conveniently located on the inside cover of this magazine) and tell us how you want to be involved. What do *you* want to see happen? I promise, there *is* a place for you.  $\circ$ 

is running a contest for the best elevator pitch to engage a member of the public and quickly educate them on "What is a Land Surveyor" and "How a Land Surveyor Serves the Public." Be creative and submit your pitch to admin@wfps.org by April 30, 2016. The winner will receive a \$100 Visa card.

#### **Providing Resources to Benefit State Associations**

WFPS is dedicated to providing resources to state associations. Following are a few of the resources currently being developed:

#### 1. Speakers Bureau

This new resource developed by WFPS will provide state associations the ability to search for a speaker by name, geographic location, or by topic. The database will include a photo of the speaker, a bio, price range, and testimonials. State associations are currently in the process of sending in their recommendations for speakers.

#### 2. Quarterly Book Reviews

Looking for content for your magazine or newsletter? WFPS will be providing a quarterly book review that state associations can publish.

#### Serving as a Regional Voice

WFPS serves as a regional voice for the surveying profession. WFPS has a long history of assisting state associations by providing support on legislative issues. This includes letters of support and resolutions for topics such as continuing education, four-year degree, and definition of surveying.

At the October Board of Directors meeting, WFPS took the following action to assist state associations with specific needs:

- ✓ At the request of Washington delegates, WFPS will write a letter of support to maintain the survey program at Clark College.
- ✓ At the request of Colorado delegates, WFPS will write a letter of support to maintain the position of County Surveyor in Colorado.
- ✓ As some states do not have a recordation law, WFPS
  Board of Directors adopted the attached resolution in
  support of survey recordation requirements.

#### **NALS-WFPS Western Regional Conference**

WFPS will co-sponsor a western regional conference with the Nevada Association of Land Surveyors. The conference will be held April 16–19, 2016 at the Golden Nugget in Las Vegas, NV. Featured speakers include: Gary Kent, Jeff Lucas, and Jan VanSickle.

As PLSO is an affiliate of WFPS, all members of PLSO receive member pricing. More information regarding the conference will be available soon. •

## You Can't Get There from Here... or Where has Deed Research Gone?

■ Greg Crites, PLS

critical part of the business of land surveying (in Oregon at least) involves research. Of course, there's the office of the County Surveyor, local Public Works departments, ODOT and other public agencies—both local and national—for researching survey/public records, but as most of you know, that's only part of the process involved in resolving the boundaries of a parcel of land. Our job pretty much starts with a deed.

A typical scenario can be found in any office of a surveying sole proprietorship. It starts once you hear the ringtone on your phone or a notification pops up in your email system that someone is seeking your services for a land survey. The initial conversation revolves around factfinding. "Do you have a copy of your tax statement? Can you read me the assessor's parcel number? Street address?" I'm sure you can recall all the possible permutations of how you get to the point of determining where their property lies so you can begin the process of researching records.

Back when I started in this business, researching deed records was a simple process. Once I gained the trust of the Assessor (if you know me at all, don't bother to ask how I did that), which was, of course, absolutely necessary to insure I wasn't someone intent on burning the courthouse down, then my work pretty much involved going into the basement of the county courthouse, gaining access to the vault where all the old deed books were stored and thumbing through the pages until you found what you were looking for. If you wanted a copy of the instrument, you carefully broke the old ledger apart, took the required original documents up to the clerk's desk and requested to make copies. (Yes, remember the term "mimeograph?") If you were faced with a particularly complicated deed, or there were elements of the description that left a hint of some ambiguity, then you would need to dig deeper.

Abstracting title (or chaining, though I don't think either term is used much anymore) involved plowing through the grantor/grantee or grantee/grantor indices to track down predecessors in title to the current owner. If you ever looked through these old books and labored through the differences in handwriting styles of the various scriveners, then you understand how difficult this process was, how time consuming it could be, and how easy it was to overlook some branch of the conveyancing trail that lead you to the source of a scrivener's error or omission.

Explaining to an anxious client about why your research took so long or was so complicated always seemed to draw a blank stare.

To a surveyor however, this was where the hunt began, where the understanding of the game gained clarity and where the pieces of the puzzle started to fall into place. This likely seems abstract to anyone other than a land surveyor, but hey, one of those "ah ha" moments that come with finally figuring out what happened can be one of the most gratifying feelings of your career. For me, a complicated deed record was something akin to catching the scent of a bull elk in the rut (I used to be a bow hunter, and that's all you need to know) while traipsing through the woods in an area where you knew there should be elk but you just hadn't crossed their trail as yet. The hair on the back of your neck stands up, your senses become instantly more acute and your normally suppressed hunter instincts surface. Sadly, it seems that this hunt for information has been supplanted by someone who you very likely have never met and have no idea of their qualifications.

This then is where my story really begins.

Lately, I've been working on a transmission line project spanning a distance of slightly more than 80 miles. The planned route crosses more than 150 parcels. A few are concentrated into large tracts owned by industrial forestry companies, but the bulk is small landowners, just like me. A project of this magnitude relies on a title insurance company to prepare preliminary title reports on every parcel that may be impacted by this line. It's not hard to imagine how completely unrealistic (or cost effective for that matter) it is to think that anyone has the budget to turn a surveyor loose to develop title abstracts on every parcel by researching the deed record. Instead, a project of this size requires reliance on title reports prepared by a title company. Those reports generally consist of an abstract of the descriptive words of conveyance (commonly referred to as the deed), some reporting on the status of the tax account and the ever present "Schedule B." If the title company has done an "adequate" job, the abstract should regurgitate the descriptive words of conveyance from the recorded deed verbatim (though I fail to see why that is necessary, as simply citing the recorded instrument and including a *legible* copy of it in the supporting documentation should suffice). The Schedule B should

have an exhaustive listing of all the possible encumbrances on the individual parcels.

Are you starting to get the picture?

There are numerous opportunities for errors when receiving a title report from a title plant that has been prepared by some unknown employee. There is no way you can know their qualifications, schooling, nationality (yep, there I said it, because cultural differences and a thorough grasp of the importance of every nuance of the English language do make a difference in how a person sees the world from a real property point of view) or experience. If you were to ask me why I don't think chaining title can be outsourced, go through a condemnation proceeding and see how quickly some savvy states attorney will shred you for relying on unproven researchers to undergird your decisions on the resolution of a complicated, contested boundary that is being crossed by this route survey. A survey that may have strong opposition from the ranks of the rural communities it affects (does the word "fracking" come to mind?).

Okay, drawing from personal experience, here's a list of possible errors:

- The title officer did a less than adequate job of preparing the abstract, e.g. typographical errors, key omissions, poetic license. As you know, this isn't the exclusive provenance of title companies. How many times have you received correspondence from a member of the bar that is a clear admission that they are practicing outside their area of expertise?
- There are omitted encumbrances in the Schedule "B." Some may have limited or no effect on the considered transaction, but then again...(see the case citation at the end of this article!)
- When the title chain is critically important to arriving at some understanding of how a particularly confounding ambiguity arose through the conveyancing trail, an incomplete record can be, not just frustrating but a fatal flaw. I can't tell you the number of times I've been faced with having to explain to an escrow officer (or whatever a title company uses for the title of a person who may be doing the chaining for you) what a title chain is and why it is critically important that they discover every document in the conveyancing record, without gaps. From my "old school" perspective, it's awfully frustrating to have to explain this process to someone else when you know *exactly* what you need and where to get it, assuming you have the luxury of time to do so.
- Erroneous citations of recorded instruments within the Schedule "B." Sorting out these obvious "dead-ends" can not only be time consuming, but frustratingly annoying. It's probably important to note here that the person/

- persons interested in the Schedule "B" may have differing needs regarding its contents and in defense of title companies, they are in the business of anticipating *all* the needs of those who may be interested.
- The time it takes to get all/any of the above resolved and produce a "revised" title report. Think about this in terms of timelines. From personal experience, the title report comes through my client via someone in the real property division. They log it into the document trail, review it for sufficiency, assign a tracking number to it, then send it on. It arrives at my desk through several intermediaries, most likely months after it has been received. I review it, discover some critical errors that need revision and then return it, only to begin the whole cycle again. If you were preparing an ALTA survey for a commercial real estate transaction, do you think any of the parties involved would understand a process like this, let alone not chafe under it?

It is not my intention to throw brickbats at the title insurance field, only to point out a major opportunity within our profession to perform outreach. There may be numerous answers regarding how this can be done, only that the need is there. This discussion within the land surveying profession has been heard many times. Numerous articles have been published within our profession regarding the question of our relevancy. I hear the term dinosaurs batted around and that we've lost sight of that relevancy. We're now faced with GIS folks, general contractors and other manipulators of geospatial data taking measurement away from us, using tools that produce results without the need to understand them. Google would be happy to do that as well! You know what? I don't care. In my macroeconomic theory class back when I was in college, they used the often-heard Latin term, "caveat emptor!" Let the buyer beware!

Our role here is to educate people about the importance of what we do in terms of our subject matter expertise. It seems there is a tremendous opportunity (and need?) to get in front of title companies, real estate professionals, attorneys and yes, even the public, and talk about what it is within the conveyancing world that is important to us and how much better the system could be if more of our professional expertise were used to influence it. Complaints about this arena have been heard since I began in this profession. We need to work toward resolving a situation that I consider to be completely unwarranted.

What prompted me to write this article? I received a copy of an appellate court decision out of Multnomah County, filed June 11, 2014, *Jeffrey Kraft and Angela Schmiede*, plaintiffs-appellants, *vs. Estate of John Ronald Cooper, Sr.; et al*, defendants, and Chicago Title Insurance Company of

» continues on page 10

Oregon, defendant-respondent (see 263 Or App 420 (2014). Summarizing, this case hinges on the sufficiency of a title report, the expectations by the plaintiffs regarding what title insurance provides and the poor counsel plaintiffs received regarding which things should be specified in the purchase and sales agreement that insured the transaction would not go through unless the outcome satisfied the expectations by the plaintiffs for the use of the property.

The case hinged on an apparently critical error within the legal description prepared by Chicago Title of a public dedication for an additional 10-foot strip of road right-of-way along the front of the parcel to the City of Portland in 1924. In a nutshell, the original north/south dimension of the property was 151.88 feet *prior* to the dedication of the 10-foot strip. This dimension should have been amended to read 141.88 feet! Why was this 10-foot reduction in width so important? The property was listed as having the potential for the development of 6 lots. Without the 10-foot strip, this wasn't possible. The plaintiffs felt that they were entitled to some recompense for this significant oversight, but the court did not agree.

It seems that the legal description prepared by Chicago Title (which in fact was the same description used in the warranty deed), though containing the factual error of the 10-foot dimensional excess, did contain additional qualifying language that covered their mistake. In essence, the erroneous dimension in the description was further limited by the additional terms, "151.88 feet, more or less, to the North line of NE U.S. Grant Place, as now laid out and established (emphasis added)." The plaintiffs relied on the erroneous dimension (the court considered this to be ambiguous), though it wasn't discovered until they had a proper survey performed after (my emphasis) completing the purchase! Yes, I said after! Of course the completion of this survey should have been a condition of the purchase and sales agreement before (my emphasis) completion of the sale, stipulating that should this survey disclose material defects in the property that prevented the plaintiffs from realizing their development objectives, then the sale would not occur.

Of course you realize that the standard boiler plate within the Schedule "B" of the title policy expressly excepted from coverage any loss or damage "which arise by reason of discrepancies, conflicts in boundary lines, shortage in area, encroachments or other facts which a correct survey would disclose." In this particular instance, a citation referencing the dedication of the 10-foot strip to the City of Portland was omitted. *That* doesn't matter. After all, how many of us ask "what benefit does title insurance provide?" Certainly there appears to be, based upon the issues at trial in this case, a clear misunderstanding of that issue! What is more interesting is, had a "proper" survey

been performed prior to closing, this whole debacle could have been avoided. Obviously, there is some finger pointing that could be done based upon questions I might ask of the interested parties in this case:

- Why didn't the purchaser's real estate professional alert his/her client to the land mine laying in wait for the unsuspecting plaintiffs prior to the sale? Where was their legal counsel? Certainly the location of this property (if you know anything about real estate values within the City of Portland) should hint at how much this parcel(s) would have been valued. Not to mention the fact that as this case went all the way to the appellate courts then there is some indication of the wherewithal of the purchasers.
- Why didn't the purchasers real estate professional advise the purchasers to obtain a "proper" survey? I'm curious whether they surrendered their commission because of this outcome!
- Why didn't someone review the title insurance policy for factual omissions prior to its acceptance (did I hear you say, where was the surveyor in all of this?")? I might add here that at least for me, standard practice is to meticulously scrutinize all Schedule "B" exceptions within the title policy to ascertain their applicability, not to mention reviewing other sources of spatial data pertaining to a particular parcel to spot discrepancies (yes, there are times when simply looking at an Assessor's map may hint at a "hidden" encumbrance).

So, back to my original premise. Do surveyors have a relevant role to play in the geospatial community? You bet they do as the foregoing discussion should illustrate, though perhaps only in some small way. I can't begin to emphasize enough the importance of obtaining subject matter expertise in the conveyancing arena. I consider surveyors to be those individuals who have the most training and expertise, if for no other reason than we're the ones who are called upon to perform "proper" surveys.

I don't need to tell you what constitutes a "proper" survey, but certainly deed research, the ferreting out and understanding of patent/latent ambiguities, the importance of words in describing the intent of the parties to a transaction (when that isn't clear on the face of a deed) and a clear understanding of the value of educating the public regarding "the single most important financial transaction most of them will make in their lives," to name a few. Sitting back and relegating measurements to the nontechnically trained members of the geospatial community is one thing, but when it comes to understanding the nuances of issues like those addressed in *Kraft vs. The Estate of John Robt. Cooper Sr.*; et. al., "Who ya gonna call?" •

## Young Surveyor Gets Plastic Surgery

■ Linda Rigutto, PLS

or over a year now, Owen Anderson (age three) has helped Grandma (Maxine Hertel) deliver surveys to the Washington County Survey Office. Each Wednesday, Owen starts his work day with a delivery of the maps—each in a square plastic tube-to Rex Russell and Linda Rigutto. After the delivery, it is not uncommon for little Owen to slide the tubes over his arms and wave them around. That was fine until his visit on July 1, 2015. That day was a hot one and Owen's arms were moist. So, when he slid the tubes over his arms, they got stuck...really stuck. Linda first tried some baby powder, but she couldn't get the powder down the tube far enough. So, after a brief photo shoot, Rex got out the scissors and cut the plastic tubes off his arms. •

Note: No grandsons were injured in the operation on the plastic tubes.

Clockwise from top right:
Jim Elam, County Surveyor; Rex Russell;
Tyler Anderson; and Maxine Hertel look on
as Owen Anderson (center) shows off the
plastic tubes stuck on his arms.

Photo by Linda Rigutto



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## The Case for Carrying E & O Insurance

■ Greg Crites, PLS

Editor's note: When this article ran in our July/August issue, a few paragraphs were omitted. We are republishing the article in its entirety. We apologize for the error.

oing without Errors and Omissions insurance (commonly known as professional liability) is much like playing Russian roulette. The consequences of having to ante up a ton of money to remedy a mistake may not result in your own demise, but almost certainly may end in the demise of your sole proprietorship. You know, that business you labored so hard to build for so many years, sacrificing time with your children, grandchildren, your significant other and probably many social connections that required your physical presence to nurture.

I have to insert some disclaimers before I paint this picture. First, I have no affiliation with any insurance carrier so don't expect any information regarding the costs of this type of coverage or who the providers might be. Second, the decision to carry E & O insurance is yours and yours alone, made from an informed position shared with the carrier of your choice. Finally, the case I'm about to make is mostly fictitious, but does represent a collection of my perspectives based on more than 40 years of land surveying experience.

#### The call

It's about 3:00 pm on a Friday afternoon. The phone rings and of course you're looking for more work to pay for that orthodontia your nearly teenage daughter simply must have. You pick up the receiver (sorry, now it's more likely your cell phone but I did mention how long I've been in practice) and offer your usual business greeting, shortly discovering that this distraught female caller has waited about three months beyond the limits of her patience before making the call. She has endured months of harassment at the hands of her neighbor over a disagreement regarding the location of their common boundary. What you don't know at this early phase of negotiations is that this woman is a transplanted Californian and her hostile neighbor, who looks upon Californians as aliens, bought his property nearly 40 years ago.

The property she purchased last year is in a rural, unincorporated area of the county; she has lots of money and is willing to pay someone well if the results of their work meet her high (though perhaps unreasonable) expectations. This woman is used to getting her way after many years as a successful actress in Hollywood and therefore possesses a sense of entitlement that you are unprepared for. She has decided to raise a very exotic type of farm animal, an animal whose fur is highly regarded by boutique clothing manufacturers (who of course will pay a premium for this fur) and is so well connected and such a natural salesperson that her farm output is contractually backlogged for more than five years. Almost immediately after closing on the sale of the property, she needed to build some extremely sturdy fences to contain her animals (fences that

wouldn't really blend with the forest environment within which they'd be built), so she hired a local surveyor to set stakes along her boundaries in advance of the fencing contractor whom she'd retained for their construction. The hostile neighbor waited until the fence-building project was completed and land clearing was well under way before voicing his disagreement over the location of the fences. Due to the wishes of his client, the local surveyor that did the layout for the fences never talked with this seemingly unfriendly neighbor.

#### The research

After getting the distraught woman to calm down, you find out that she obtained your name from her attorney (do you hear any warning bells yet?) and that you were highly recommended for the work. Of course, she wants to know how much she'll have to pay for your services, but you've made it a standard practice to do your research before preparing an "informed" estimate. Giving her assurances that you will call her back, you make it clear that you must do some research first. To expedite your research, you ask her if she has a copy of the deed (she does), whether she has a copy of her title report (assuming she paid for one) and if she has done research of her own in the public records to see if any surveys have been performed in the vicinity of her property (she has not). You request that she mail you a copy of the deed and the title report. Almost as an afterthought, you ask her to include a copy of the recorded survey prepared for the fencing contractor. A brief silence ensues, after which she remarks that the fencing surveyor did not record a survey as no permanent monuments were set (obviously his words, he merely set wooden form stakes for the fencing contractor to follow). She could, however, provide a copy of his work map. You tell her that once you receive the information you've requested and have had time to conduct a little research within the public record, you will call her back with your decision whether to take on the job and, if so, how much it will cost. Of course, she wants to know how long that

A copy of the deed shows up in the following week and things appear simple (do you hear another warning bell?). The property is a metes and bounds description of a ten-acre tract (the section, township and range don't matter at this point) with one exception: the point of beginning (POB) is defined as the NE 1/16 section corner! Interestingly, the bearings of the out bounds of the 10-acre tract are recorded to the nearest second and the distances along each course are shown to the nearest one-hundredth of a foot (there are those warning bells again)!

The local surveyor performed a legitimate subdivision of the section to arrive at the location of the POB and computed the location of the fence lines to be built based on aliquot parts (as

there was no reference in the deed to the basis of bearing), relying on previous work he'd done in the area to help reduce his price. On the face of it, things look uncluttered. There was one oddity on the copy of the work map: the map showed found iron pipes near each of the fence corner stakes and they varied in distance from the to-be-staked fence corners by anywhere from three to fifteen feet away. However, all were galvanized iron and sizes ranged from ½ inch to a full one inch inside diameter. Now that was at least one more red flag! Where did they come from and, once you started thinking about it, a flood of other questions popped into your head when confronted with found monuments in the vicinity of the computed locations of the corners of the aliquot parcel? Now the surveyor in you and all your experience kicks in. It's called a puzzle, a geospatial and historical research puzzle, but one that just naturally starts you thinking of how to solve this mystery.

Using the work map as a basis, you compute the exterior dimensions of the parcel as if the found monuments defined it. Coincidentally or not, the area defined by the found iron pipes is nearly 10 acres! The angular relationships between these same exteriors, though not entirely conforming to the deed record relationships, seem to indicate that those iron pipes were established by someone with a knowledge of surveying. They could be construed to accurately depict the boundaries of the 10-acre parcel if the, as yet unknown, surveyor had performed a boundary survey over 40 years ago using the tools then available and prior to the purchase of the adjoining parcel by the hostile neighbor! The concept of standards of practice in effect at the time of a survey done 40 years ago (or more) can't help but make you wonder.

#### The puzzle

Your first thought after analyzing the deed and dissecting the work map was that talking to the hostile neighbor was necessary, just to find out what he knows. Of course, you couldn't let the prospective client know what you were up to, but since you don't have a signed contract as yet, you're under no "loyalty" agreement to an unknown woman who hasn't paid you a dime. Contacting a friend who just happened to live a few miles from the property, you ask him if he knows the hostile neighbor and if so, whether he could dredge up a telephone number in hopes of setting up a meeting to discuss the issues. Interestingly, he does and, as a courtesy, he'll arrange it for you, as his rapport with this particular gentleman may save you from a confrontation that might not help over the course of doing the work.

It still wasn't too late to contact the neighbor and it wasn't around dinner time, so you take a chance and call. His wife answers the phone and after a brief "cold call" introduction to gain an audience, she yells through the house to her husband that he has a call from some surveyor and please pick up the phone. So much for telephone manners and so much for having to start the conversation in a courteous and respectful manner because based upon the relationship this person has not developed with his Californian neighbor, you are perceived as an enemy before you get a chance to open your mouth!

After the expected hostile greeting, you steer the conversation away from the emotions surrounding the issue and state very clearly and forcefully that you are not under contract with this woman. Now, you are merely trying to discern some additional background and would it be possible to come by their home to sit down man-to-man and discuss the issues, talk about the history of their ownership and any other salient information that may help you understand this apparent dispute. Reluctantly, the neighbor agrees and you set up a time to meet a couple of days hence. Meanwhile, you take some time the following morning to do further research of the deed and survey records, focusing on the descriptions of the adjoining parcels. The thought occurs to you that all the descriptions were prepared by the same scrivener, as all bearing calls are to the nearest second and distances to the hundredth of a foot. Not surprisingly, adjoining lines all show the same bearings and equal distances, so at the very least, someone had made sure to pay attention to previously recorded instruments, or maybe there was something else, such as an unrecorded rural subdivision!

The most puzzling result of the research is a record of survey, filed some 30 years previously, just after the recording act passed in Oregon. It happens to fall in the southwest quarter of the same section and it too is a ten-acre tract though nearly one-half mile away from the parcel you're researching. You recognize the name of the land surveyor that recorded the map. His name leaves a sinking feeling in your stomach. From personal experience, you know this gentleman was a timber cruiser by trade and worked for a large industrial forestry company in the heyday of the Oregon logging industry. He had a reputed history of borrowing equipment from his employer, primarily consisting of a staff compass and chain! It's a scary thought, but hey, back in the day when this survey was done, logged over rural land was being auctioned to recover back taxes to the tune of \$1.50 per acre, so doing a "top notch" survey apparently wasn't warranted considering the value of the real estate.

As a courtesy, the following morning and armed with your research, you make a call to the fenceline surveyor to let him know what you're doing and to find out if he has any misgivings. He completely understands and seems a bit relieved to be shed (apparently) of the highly annoying client. You tell him that you still haven't accepted the job and ask if he would, as a courtesy, not disclose the fact that the two of you have talked about his former client and her situation.

#### The meeting with the hostile neighbor

You arrive a few minutes early, project folder tucked under your arm. The hostile neighbor is sitting in an old rocker on the porch waiting for your arrival, requisite hound lying comfortably at his feet. After the customary introductions, you notice this person also has a folder lying beside his rocker. You get right down to business and offer to show him the research you've completed so far and to characterize the problem from the context of his neighbor who is trying to retain your services. His response is an odd smile and a gleam in his eye, one that you've seen before, that "I know something you don't" look, as if he's about to perform some feat of magic that will surely leave you speechless. He's very interested in the copy of the work map made by the fenceline surveyor (as he hasn't seen it), particularly with regard to the found iron pipes noted thereon.

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"I told that surveyor that I had some information which might prove valuable to him, but he just looked at me like I was from another planet! Let me show you what I was perfectly willing to share." He bends over and extracts a yellowed sheet of paper from the folder lying on the porch. Unfolding it, you can see it's an old, blue-line reproduction of a survey map. Upon closer inspection, two things catch your eye. First, it is definitely a copy of a subdivision plat. Though primitive, it shows iron pipes set at the corners of each ten-acre tract within the section (type and size are omitted, but there is a symbol noted in the legend for set monuments, and that symbol is drawn in at every parcel corner). Second, you immediately notice that the bearings and distances match those shown on the recorded deeds! The damning evidence is the surveyor's seal. It's the same surveyor whose stamp was on the old record of survey you'd already found, the old timber cruiser who has a historical reputation of not doing very high quality work!

Trying your best not to disclose your excitement at seeing this map, you ask the hostile neighbor if you can borrow it to make a copy for your records and for recording with the County Surveyor. Of course, he's reluctant to do so, but you tell him that had this map been a part of the public record prior to the adjoining purchase by his new Californian neighbor, this whole situation may have been avoided. That seems to get his attention. You promise to get the map back to him the following afternoon, shake hands and leave, thinking that you may have gained yet another modicum of respect for your professional standing from an unexpected corner of the state!

After recording this map with the County Surveyor, you call the potential client from California and explain to her that your research has uncovered some interesting information that you feel compelled to share and could you meet to discuss the situation considering your results. Naturally, you've galvanized her interest and she wants to meet as soon as possible. You set up a meeting for the following afternoon.

#### The meeting

You shake hands and, to put you at ease, she graciously offers coffee and cookies before you sit down to discuss your findings. It's obvious this woman has a great deal of money as you can't help noticing the original artwork hanging on the walls, the tastefully appointed furnishings and the complete absence of disorder, likely indicating the services of housekeepers. Accepting the coffee but avoiding the cookies, you spread your research out on her expansive table. You begin by explaining your conclusions drawn from the deed records, your curiosity regarding the found iron pipes shown on the work map, and finally, unrolling the copy of the now recorded subdivision plat representing all the 10-acre tracts within her section. You specifically emphasize the abundance of iron pipes set to define the boundaries of each parcel. Interestingly, each one of the 10-acre tracts on the formerly unrecorded subdivision shows a lot number, something that has been conspicuously omitted from the deed records!

Clearly, the original intent was to monument the boundaries of each 10-acre tract and these monuments would serve to delineate the boundaries prior to sale. You tell the California

lady that had the fenceline surveyor seen this survey plat prior to commencing his work, he would most likely have arrived at a different conclusion regarding the location of her boundaries and would have held the found iron pipes as the basis for marking the lines for the construction of her fences! Such a posture might have avoided any disputes with her neighbor. Considering her neighbor had been living on his property for more than four decades and knew of the existence of these iron pipes, he had accepted their existence as defining his boundaries. He had attempted to raise his concerns with her fenceline surveyor (who happened to be reluctant to talk with him due to the already evident tensions over the boundaries) without success. You remark that it would be unlikely if the outcome of any quiet title action would result in a decision in her favor. The cost of litigating a resolution would likely far exceed the cost of moving the fences to the more defensible location based upon the old plat record, and would result in virtually no change in the area she purchased.

Without further thought, she says she wants you to perform the survey to rectify the situation and as far as she's concerned, the fenceline surveyor is terminated. You explain that this will require removing the new fences and placing them in their proper position. As a courtesy, you must contact the fenceline surveyor and explain what you've been contracted to do. She understands and states unequivocally that she doesn't like the situation but just wants to be done with the conflict so she can move on to the business of breeding and raising her animals.

Concluding your discussion, you tell her you'll draw up a contract and get back to her in a couple of days with the price. She thanks you and wants to know when you can start? You can't help but wonder whether she'd pay whatever price you quote, recognizing that this could represent an opportunity to recoup some of the losses you've incurred on other projects that suffered overruns, but that is only a fleeting thought. Better to take the high road, preparing an accurate and fair estimate. This woman seems like just the type who, if wronged, might come back to haunt you in ways you never imagined. You set up another meeting and deliver the proposed contract together with your fee. The California lady wants a day to have her attorney review the contract but assures you that there's no problem with the fee! How often have you heard that? You wonder, "What did I miss?"

Strangely, the phone never rings the next day, or even the next. Instead, a certified letter arrives in the mail several days later, return receipt requested. You immediately recognize that it's from an attorney, apparently *her* attorney. After regurgitating the salient facts as you related them to this prospective client, you see your fee go up in smoke. The attorney has advised his client that the fenceline surveyor is responsible for rectifying his mistakes without additional cost (at least not to the California client). If he is unwilling to do so, then litigation will follow. Because you know this fenceline surveyor and can make some suppositions regarding how he runs his business, you imagine that it's unlikely he carries E & O insurance. You can't help but think the cost of resolving this mess could approach tens of thousands of dollars (if not more if a civil suit ensues that awards punitive damages for the emotional trauma along with all costs

incurred to correct the "mistake"). Maybe this outcome wasn't so bad after all.

This wouldn't be the first time all your efforts at research go uncompensated, nor will it be the last! You actually breathe a big sigh of relief, thinking that this California lady would likely be the source of numerous headaches and unwarranted demands, not to mention further tension arising between the neighbors that would undoubtedly rub off as additional irritants.

From a professional liability perspective, where has the exposure occurred? Following a conversation with Laura Ledbetter, account manager for Hall and Company on the potential situation, we discussed the following:

• In this scenario, claims exposure may arise because the fenceline surveyor can be shown to have "exhibited a standard of care that is below what is usual and customary" for other surveyors practicing in the area. The law holds professionals to a distinct level of care. A standard of care provision in a contract has proven to decrease exposures that could lead to a claim. A well-written standard of care provision should conform to the prevailing definition for professional negligence in the jurisdiction of the project. For example a common standard of care provision might contain the following language:

The Surveyor shall perform its services consistent with the professional skill and care ordinarily provided by Surveyors practicing in the same or similar locality under the same or similar circumstances. The Surveyor shall perform its services as expeditiously as is consistent with such professional skill and care and the orderly progress of the Project.

- Further, in the absence of a written contract, the likelihood for claims exposure increases as the contract would have spelled out the scope of services and could also include disclaimers regarding any unwarranted conclusions that the client might draw from the results. A well-written contract is the best first step a Surveyor can take to significantly manage the risk of a claim against their firm.
- As a general rule there are four broad issues that at a minimum should be expressly addressed in every contract:
  - 1. Description of the project
  - 2. Surveyor's scope of services
  - 3. Surveyor's professional fees
  - 4. "Legal" requirements such as indemnification and hold harmless, insurance requirements, copyright & document ownership, right of assignment, site safety, and dispute resolution, to name a few...
- In this scenario, an approximate corner was set so that the fencing contractor could do their portion of the job. The establishment of "approximate corners" or temporary stakes may cause "a misunderstanding by clients and the public resulting in unfulfilled expectations," increasing the risk of liability claims exposure. "There is a certain element of detrimental reliance by the client anytime a professional performs a service." Setting temporary stakes seem intended to connote something less than an accurate location of the boundaries, "but that does not prevent the client from

bringing a claim for additional cost, loss or damage if there is a subsequent property dispute!"

From my own perspective, attempting to avoid the statutory requirement for filing a record of survey by setting "non-permanent" marks and thereby reducing costs does a terrible disservice to the public and creates a ripple effect that radiates back through the public record by creating "color of title" that is unwarranted. This sort of behavior is unprofessional and does nothing to create the kind of perceptions of our profession that we desire.

How many times have you encountered fences in the field that fall within close proximity to the boundary you've been asked to resolve? How many times have you wondered how they got there and under what circumstances? How many times have such fences been in existence for longer than the statutory period required to raise the specter of an adverse claim? The same is true for monuments established by long-absent surveyors who never recorded a survey or left behind their records after they were gone.

I can't stress enough the importance of doing a *thorough* job of research. When faced with a particularly complicated boundary resolution where the intentions of parties is virtually lost through the passage of time, get creative in thinking about where land records might be found. From my own experience, there are several sources of information that you may not have considered:

- The offices of the City Engineer or City Surveyor in metropolitan areas.
- Living relatives of now deceased licensed land surveyors.
- Heirs, assignees or relatives of property owners who once lived in the area around the time that original conveyances were created! How many times have you watched "Antiques Roadshow" and seen firsthand some of the family memorabilia that has been saved over many generations?
- State or local historical societies.
- · Local museums.
- The oldest living resident who has resided in the area the longest.

There may be other sources of information specific to a particularly difficult survey. These sources may best be discovered through networking within the local surveying community. As stated in one of my previous articles, doing a *thorough* job of research means you have "left no stone unturned."

The devastating financial impact to your business resulting from an outcome similar to the "fictional" scenario just illustrated should send you on a direct path to your insurance carrier or at the very least to begin investigating coverages and rates. The NSPS website may be a great place to start. If you already carry general liability, vehicle and equipment insurance, it might also be worthwhile to check with your present carrier (assuming you haven't already done so) to obtain more specific information. Just as title insurance is a hedge against the likelihood that any claims against your property may arise resulting in the loss of title to it, carrying E & O insurance is a far better "hedge" than playing roulette without it!



# Teaching with Spatial Technology

■ Timothy A. Kent, PLS



uring the last week of June, sixteen K–12 teachers were on the Clark College campus in Vancouver to immerse themselves in surveying, global positioning systems (GPS), and geographic information systems (GIS). The program, Teaching with Spatial Technology (TwiST), is sponsored by Oregon Technical Institute and is taught by three professors from that institution: Mason Marker, John Ritter, and Tim Kent.

The impetus of the program is to have high school teachers become aware of and utilize knowledge in spatial technology so that they can expose their students to these somewhat unknown employment fields. This information can be used to help guide the students to look at post high school education and hopefully enroll in colleges that teach these technologies.

These K–12 teachers were from most of the western states and teach math, history, and related sciences at their schools. They were provided a number of teaching tools including software and hardware that they could then incorporate into their curriculum.

The teachers were in the classroom in the morning and roving around campus most afternoons, collecting data

with their new GPS units, measuring their pace, and using their new hand compasses in a variety of exercises. It was great to watch them in their many "aha" moments as it all began to come together. The spatial data gathered with the GPS units was then downloaded into ArcGIS software for further analysis and use in-lab sessions.

A huge thank you is due to the efforts of the state surveying societies and the Board at NCEES in offering monetary support to the teachers. They provided funds for their registration fee along with most of their travel costs. Of course this training would not have been possible without the excellent support and instruction from my colleagues at Oregon Tech, Professors Marker and Ritter. I am indebted to them for their effort with TwiST.

Be ready to recruit teachers to attend the 2016 event at Clark College in Vancouver. Support this effort by identifying teachers that you believe would benefit from attending this training. Remember, the students they teach can become the professional surveyors of tomorrow. •

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The impetus of the program is to have high school teachers become aware of and utilize knowledge in spatial technology so that they can expose their students to these somewhat unknown employment fields.





#### **Ouestion:**

Can you identify the location of this educational Oregon roadside attraction?

If you have ever "Imagined Being a Surveyor" you should check it out.

More on that in the answer to this question.

> n a recent visit I found that the center contains a small exhibit titled "Imagine Being a Surveyor!," but the signage appears more like there used to be surveyors rather than that we are still a thriving and integral profession in the modern world. While I understand that the exhibit is centered on capturing the history of the forest and the Tillamook Burn, it seems this would be a great project for PLSO to take on. With the proper sales pitch to the facility managers and without redoing their entire exhibit, it would seem that some small changes in verbiage and maybe a couple then and now pictures on the sign would show we still exist and what we look like today. It could become a small beacon for our profession that is seen by thousands each year.

The exhibit also contains a small mapping exhibit on the history of transportation routes through the forest and once again by improving some signage this could add volumes to what people know about surveying. I found nothing that tied the mapping exhibit to the surveying

Answer: The next time you travel Highway 6 from Portland to Tillamook be sure and stop at the Tillamook Forest Center. It is located at 45500 Wilson River Highway just west of Jones Creek and the Smith Homestead Day Use area.

Tanox Forest Center

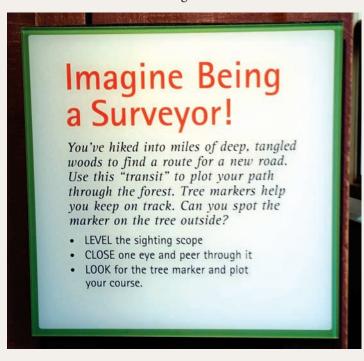
To find the second of t

exhibit that was literally less than 10 feet away around the corner. (See photos on page 20.)

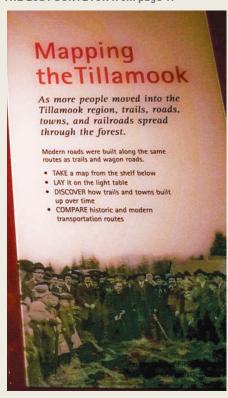
Also nearby is an exhibit with a staff compass explaining how surveyors in the 1940s (during the time of the Tillamook Burn) established "quick and dirty" lines through the rugged terrain. While those "quick and dirty lines" may be true, I think with only a few additional pieces of information there could be a valuable comparison to how we do things today.

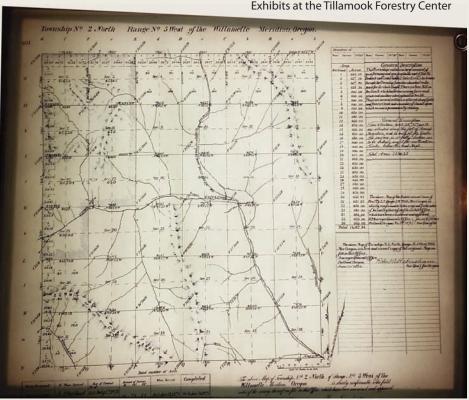
The Tillamook Forest Center is well worth the stop on the way to or from Tillamook. It is extremely well done and informative for all Oregonians. There is also an opportunity here for PLSO to make a valuable contribution to this popular location and to our profession. For minimal expense and with a little effort, PLSO could help the public to have a better understanding of the contributions we have

made and what we do today. As an additional challenge, the grounds around the Tillamook Forest Center are expansive and could easily support a small outdoor surveying exhibit sponsored by PLSO, but that is a larger project that would need to be introduced to the facility for approval and then further developed if it was possible. •









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Political Action Committee (PAC)

**US Congress** 

**Federal Agencies** 

Assistance on state specific matters (if requested)

Other geospatial organizations

International Federation of Surveyors (FIG)

Coalition of Geospatial Organizations (COGO)

#### **Education**

ABET-Lead Society for surveying/geomatics program

evaluation for accreditation

Scholarship Program – 15 annual awards

#### Licensing/Standards

NCEES - Participating Organizations Liaisons Council (POLC)

ALTA/ACSM Land Title Survey Requirements

**NSPS Model Standards** 

#### **Outreach Opportunities**

Trig-Star

Boys Scouts Surveying Merit Badge

National Surveyors Week

#### **Certification Programs**

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