SAMPLE BASELINE REPORT TEMPLATE

BASELINE CONDITIONS REPORT TEMPLATE:

TITLE PAGE (Baseline Conditions Report/Name of Property, Preparer, and Date)……………… 1

TABLE OF CONTENTS pages (number of pages of text, photos and maps - numbered and cited in declaration by preparer to prevent additions at a later date)…………………………………………………………………………………………………… 2

DECLARATIONS1 (Preparer, Grantor and Grantee)……………………………………………………………3

ACKNOWLEDGEMENT OF CONDITION2 (Grantor/Grantee)………………………………………………...4

LOCATION OF ORIGINAL DOCUMENT (Permanent File location)……………..…………………………4

SUMMARY INFORMATION (of the size, location, contact info, APN #s etc.)……………………………..5

INTRODUCTION…………………………………………………………………………………………………………………………6

A. Purpose of Baseline Conditions Report (Sample Text: The purpose of this baseline report is to document the current physical condition of the Property. The scope of the report is confined to the Conservation Values, purposes, rights and prohibited uses as specified in the Deed of Conservation Easement. The report establishes the baseline condition of the Property and therefore will serve as the reference point for all land stewardship activities (e.g., easement monitoring) henceforth. Although this baseline report is intended to provide objective information that supports the Deed of Conservation Easement, this report is not intended to supersede the Deed of Conservation Easement. For a complete list of the rights and prohibitions, refer to the Deed of Conservation Easement.)

B. Historical Information (regarding the donation/acquisition)

C. Methodology and Date of Site Visit (Sample Text: As stated in the Deed of Conservation Easement, the Conservation Values of the Property are conserved and protected through the prohibition of specific activities while allowing other uses to occur. To guide our collection of data for the preparation of this baseline report, a checklist of prohibited land uses and reserved rights was prepared from the Conservation Easement. Henceforth, the enforcement of these restrictions is the responsibility of the Conservancy. A map of the Property was prepared using County Tax Assessor plat maps and mapping software (Arc Map ESRI™ 10.1 and a global positioning system (GPS) unit and Canon Powershot digital camera. Using the GPS unit (accuracy ± 50 feet), we walked and/or drove along portions of the perimeter of the Property, and inspected all roads, buildings and improvements. We established a series of point locations to photo-document the Property and to assist future land stewardship activities (e.g., easement monitoring). The coordinates (Degrees, minutes, and seconds) and projection (North American Datum 1983 feet, California Zone V) for all photo-point are provided in the Map of Photo Monitoring Points and photo descriptions are located in the Photo Index.

Where estimates of areas were needed, we calculated values using on Arc Map ESRI™ 10.1, and GPS coordinates. The estimates of acreage are reported herein and are plotted on appropriate maps. Building and Improvement descriptions were included from the Narrative Appraisal Summary Report prepared by XXXX.
The Maps were created using Arc Map ESRI™ 10.1, and are comprised of data created by XXX.

D. Acknowledgements (Persons who were involved in the preparation of the document along with baseline preparer’s qualifications and contact information)

PURPOSE OF THE CONSERVATION EASEMENT................................................................. 7
(Evidence of the significance of the protected property and support for conservation values)

GENERAL PROPERTY DESCRIPTION (Topo, features, current uses, surrounding land uses directions, nearby protected lands, easement, leases and other encumbrances on the property historical and current uses, and legal description etc.) 7

PROPERTY DESCRIPTION AND CONSERVATION VALUES........................................... 8

A. Conservation Values as relates to the IRS conservation purposes test and document public benefit according to the current land uses as applicable to the easement property’s conservation values listed in the easement.

i. Historic/Archaeological/Cultural Features (buildings/sites or historic uses) (For archaeological or historical features: document significance of historical structures or uses; document archaeological features; describe significance.)

ii. Natural Habitat: (a description of representative flora and fauna; extent and nature of natural communities, threatened or endangered or sensitive species; identify critical or significant habitat or migration corridors; narrative description of regional significance of biotic resources; attach data from qualified sources indicating significance of features such as state wildlife department maps or biologist report)

iii. Agricultural Features. (For agricultural lands: description of products, methods, grazing intensity, water rights and any agricultural plans in place (such as NRCS management plan) may be included with a copy attached, and the location of any prime or unique soils or soils of statewide interest indicated on a soils map.)

iv. Forestry lands: (description of forest cover and status, past harvest practices.)

v. Scenic Open Space (views from and of property) (For scenic resources: a narrative description of scenic qualities, discuss in detail from where does general public see the scenic features, identify whether the property is visible from: a public road, scenic byway, public lands, waterways, copies of any scenic inventories or other information supporting scenic importance of land.)

vi. Public Access (For public access/recreation: describe the nature of recreation and any existing or proposed public access and show on map.)

vii. Public Purposes Test: (Describe any local governmental policies that demonstrate the easement as furtherance of current and adopted local government conservation policies; copies of master plans or other existing government policies to be attached.)

B. Land Uses and Infrastructure and Improvements (describe existing conditions including manmade improvements that relate to the easement’s restrictions and reserved rights and data that would influence the exercise of reserved right)

SOURCES AND LITERATURE REVIEWED (All baselines will contain a list of sources used in preparing the materials, including the names of persons interviewed and other scientific materials)................................................................................................................. 11
PHOTOGRAPHIC DOCUMENTATION

A. Photo Index
B. Photographs – Onsite Monitoring Photos
C. Map of Photo Monitoring Points

MAPS

A. Regional Map – (Location of property in relation to nearby roads, protected lands and cities)
B. Topo Map- Section of USGS 7.5 minute Topographic Map
C. Natural Habitat and Infrastructure Map (map showing roads, buildings, fences, trails, power lines, etc. irrigated lands, waterways, wetlands, and riparian areas with accompanying narrative description)
D. Delineation of the Building Envelope and Intensive Farming Area (if applicable)
E. Soils Map – USDA soil types and classifications (if applicable)

1 DECLARATIONS OF ACCURACY

This Baseline Conditions Report (consisting of ___ pages of text including the Cover Page and Table of Contents, ____pages of maps, and ____ pages of photographs) is prepared to document the current status of the Beautiful Ranch referenced “the Property” with the Deed of Conservation Easement to be held by the Land Trust, a 501(c) (3), non-profit organization.

I declare that, in the preparation of this Baseline Conditions Report, I acted under and fulfilled my duty to gather and record the information contained herein accurately and in the regular course of the business of the Land Trust. Further, I declare that the information contained herein accurately reflects my personal knowledge gained by my field observations on ______________, 201X. I declare that the information contained herein was recorded at or near the time that the information was obtained and accurately describes the conditions of the physical features and uses of the Property.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration was executed on ________________, 201X.

______________________________
Director of Conservation Science

______________________________
Conservation Project Manager

DECLARATION OF RELIANCE AND CERTIFICATION OF RECORD

Acting as the Executive Director of the Land Trust and as its Custodian of Land Records, I declare that the Land Trust adopts, has relied upon, and will rely upon the information contained within this report to describe the condition of the Property. Further, I certify that the preparation of this document complies with our general procedures for creating and maintaining business records, and specifically with our procedures for the creation of Baseline Condition Reports. This document was prepared in the regular course of our business for the purpose of managing our conservation easement portfolio.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration was executed on ________________, 201X.

______________________________
Executive Director
ACKNOWLEDGMENT OF CONDITION

(Landowner) certifies that as Grantor, and (Executive Director or Board President), the Grantee of a Conservation Easement Deed on land located in XXXX County and known as the Beautiful Ranch, executed by the parties and recorded in the real property records of XXX County are familiar with the condition of the land subject to said Deed of Conservation Easement dated: _____, 2010 and do acknowledge and certify that this Baseline Conditions Report, and all of its inclusions, is an accurate representation of the condition of the Property as of the date of the Deed of Conservation Easement. It is the intention that this Baseline Conditions Report is suitable for IRS purposes pursuant to Treasury Regulation § 1.170A-14.

Grantor

Executive Director of Land Trust, representing the Grantee