Appendix XX:
Baseline Inventory Documentation Guidance



BASELINE INVENTORY DOCUMENTATION REQUIREMENTS

The Private Forest Accord (PFA) Grant Program requires Land Acquisition Grantees to prepare comprehensive Baseline Inventory Documentation (the "Baseline") for all properties in which PFA Grant Funds are invested. The Baseline is a legally binding record that is incorporated by reference directly into the final, recorded Conservation Easement Deed. This requirement applies to permanent conservation easements purchased from private landowners.

1. Purpose and Function of the Baseline

The primary function of the Baseline is to establish an objective, certified record of the property's existing physical, biological, and human-made conditions at the exact time the conservation easement is executed. This document serves as the legal benchmark for annual monitoring and future programmatic enforcement.

2. Requirements for Restoration Projects

When the PFA Grant Program awards funding for a property interest that requires significant ecological restoration, the Baseline must expand beyond current conditions to include a technical "Description of Restored Conditions". This section must detail the specific, intended habitat outcomes and future conservation targets agreed upon by the Applicant and the Department. Applicants pursuing projects with significant restoration components must consult the PFA Conservation Easement Guidance, which is accessible via the Land Acquisition Grants portal on the official agency website at PFAGrants.com

3. Review and Minimum Standards

The specific contents of each Baseline depend on the individual terms of the conservation easement, the distinct riparian or aquatic features of the tract, and the biological conservation objectives for which the funding was awarded. To secure mandatory Department approval prior to closing, the Baseline must meet all minimum technical standards established by the PFA Grant Program.

Additionally, Grantees are solely responsible for ensuring that the final Baseline incorporates any supplementary information necessary to comply with federal regulatory standards, including Federal Treasury requirements where applicable.

Use of Baseline

The Private Forest Accord (PFA) Grant Program utilizes the Baseline Inventory Documentation as the primary administrative tool for monitoring properties encumbered by PFA grant investments. The Baseline serves as a critical regulatory mechanism for detecting changes in conservation values, assessing property modifications, determining legal compliance with the Conservation Easement Deed, and evaluating long-term project outcomes.

1. Monitoring Protocols and Compliance

- Change Detection: The Department relies on the Baseline to establish a precise physical and biological benchmark, allowing contract monitors to isolate and analyze shifts in the property's ecological condition over time.
- Compliance Assessments: Annual monitoring evaluations will cross-reference current ground conditions directly against the data recorded in the Baseline to confirm adherence to all restricted and prohibited use provisions.

- Methodological Consistency: To maximize the efficiency of tracking habitat trends, the Department recommends that Grantees execute their internal monitoring using the exact methodologies established during the baseline compilation. Consistent technical methods ensure data compatibility, streamline the detection of variations, and accelerate the deployment of adaptive management strategies.

2. Project Budgeting and Eligible Costs

- Stewardship Tool: While the Baseline functions as a state regulatory record, it simultaneously serves as a foundational management tool for the Grantee's long term property stewardship obligations.
- Funding Eligibility: Applicants are strongly encouraged to account for the technical costs of baseline preparation within their proposed project budget at the time of application submission.
- Resource Sufficiency: Including these professional services in the Contracted Services category ensures that adequate grant resources are allocated to produce a high-quality, data-dense document that satisfies both Department compliance standards and the Grantee's operational tracking needs.

Minimum Baseline Requirements

Grantees may use the assistance of project partners and other parties to complete the Baseline. However, the grantee must be the author or co-author of the Baseline, is responsible for working directly with PFA GRANTS for review and approval of the Baseline, and is required to sign the document.

The information in the Baseline must clearly differentiate the conservation easement area from the property when the conservation easement does not encumber the entire property. Where necessary for context and completeness, the Baseline should include information about both the easement area and the property, when the two differ

I. General Contents

- Purpose of the conservation easement
- Date Baseline was prepared
- Date of Baseline site visit and photographs, if different than Baseline preparation date
- Baseline authorship and authorship qualifications
- Landowner contact information (name, address, phone numbers)
- Land manager contact information, if different than landowner
- Physical address of the property, including the county
- Directions to the property from the nearest town or major highway

II. Property Description and Data

- Acreage
- Township, Range, Section, tax lot numbers, and legal description
- Physical setting – a general description of the area surrounding the property, including adjacent land uses
- Historical ownership and use – a description of the history of the property, including past land uses such as agriculture, forest management, wildlife management, and residential
- Present land use – a description of the property's current zoning and uses such as agriculture, forest management, wildlife management, and residential
- Appurtenances, including any access easements and water rights that benefit the property
- Encumbrances on the property's title, with descriptions linked to document recording numbers or

book and page numbers if document recording numbers were not assigned. This information may be arranged in a table if desired.

- **Existing development** – a description of human modifications of the property, such as structures, roads, trails, ditches, fences, and utility lines
- **Conservation values** – a description of the ecological features and conditions that will be protected by the conservation easement. PFA GRANTS priority ecological systems, plant communities, and species, and acreages if applicable, must be documented and consistent with those stated in the PFA GRANTS grant application and conservation easement. The conservation values must be described in objective and specific terms, using quantitative information collected onsite (e.g., biological survey data) as appropriate for tracking changes in conditions over time.
    - A description of any observed threats to the conservation values, such as invasive species, evidence of trespass, and erosion. The information should be presented in objective, specific terms, including quantitative data as appropriate for tracking changes in conditions over time.
    - In this guidance, an invasive plant refers to any plant, non-native or native, that may degrade the property's conservation values. Invasive plants must be mapped as described in the Maps section below. An estimate of the abundance of each species must be provided, either as density (number of plants per area) or percent cover of each species per mapped polygon. Abundance estimates assist in detecting and responding to an increase in invasive plants.
- Survey and GPS data (e.g., invasive plant surveys, boundary data).
- If a prior assessment of the property (e.g., rangeland assessment, invasive plant survey, wetland delineation) is being relied on as Baseline information, the assessment must be:
    - **Prepared no more than 18 months before the Baseline;**
    - Appended to the Baseline; or at a minimum, incorporated into the Baseline by reference and a statement that the assessment will be kept together with the Baseline (see Baseline Format, below); and
    - Confirmed by a subject matter expert as accurately portraying the property's conditions at the time of the Baseline. The subject matter expert must inspect the property at the time of the Baseline and render an opinion free of bias or conflicts of interest.

III. Photographs and Drone Images

- Photographs of property features, including all the following as applicable: houses; barns; other structures; fences; roads; utility lines; trails; areas of potential restoration or future land use change (e.g., site of allowed future kiosk construction); threats or impacts present at the time of the Baseline (e.g., an unauthorized trail used by trespassers or a dumping area); and priority ecological systems, plant communities, and other features identified as conservation values in the grant application and conservation easement.
- Photographs must be taken at a distance that is appropriate for clearly depicting the features and conditions at the photo point.
- Photographs must be accompanied by directional notations and a label that describes what the photos depict.
- Photographs must be taken in the four cardinal and four ordinal directions when documenting 360-degree conditions.
- All photographs must be accompanied by GPS coordinates and the location of the photographs must be depicted on a map.
- The amount of photo documentation that is appropriate for the property depends on the size and features of the property. For example, a large property that contains extensive infrastructure and ecological variation will require more photographs than a small property that lacks infrastructure and is

ecologically homogenous. Grantees should consult with PFA GRANTS regarding a plan to photograph the property's features. The goal will be to reach agreement on the extent of photographs that is necessary for monitoring conservation easement compliance and ecological changes.

- Grantees should consult with PFA GRANTS regarding organization of the Baseline's photographs. For a large property with numerous photographs, the Grants team may request that photographs be grouped by type or by zones or areas of the property, with a map of photo points for each grouping. The goal will be to ensure that the photographs are clearly linked to photo points on a map and the scale allows the map to be easily read.
- Drone images may be included in the Baseline, with the following conditions:
    - The Baseline for conservation easement projects must include the landowner's agreement to all future drone use that is necessary to replicate drone images (see Baseline Acceptance and Acknowledgement, below).
    - Drone images no more than one year old must be provided to PFA GRANTS upon request. PFA GRANTS may request the images once every five years.
    - Drone images alone are not adequate for documenting all features of a property. Ground photographs must be used for features that can only be clearly depicted on the ground, including but not limited to structures, property boundaries such as entrances where trespassing is most likely to occur, instream habitat structures, site conditions under dense canopy cover, and any threats visible only at ground level. Drone-based photos may be appropriate for capturing conditions at the landscape scale (e.g., juniper thinning, floodplain inundation).
    - Drone images must be still images. Videos are not accepted.
    - The spatial resolution of drone images must be sufficient to clearly depict features required by this guidance.
    - Drone images must be accompanied by a repeatable flight plan that includes GPS points. A screenshot of the flight plan with flight altitude above ground (e.g., 200 feet), photo numbers, and the direction of view of each photo must be included in the Baseline. A map of the property showing the location of each flight plan must also be provided to locate each flight plan relative to the rest of the property. Drone software must be used to document the path, angle, elevation and other important aspects of the drone flight and photography, so that images are repeatable. The grantee must have the capability to store drone images and metadata so flights can be replicated.
    - All drone images must include captions that describe site features captured by each photo.
    - The grantee's stewardship fund must include funds to obtain drone images, such as the cost of a drone contractor, or the cost of the drone, drone-related software, staff technical expertise, time required for flights and post-flight image analysis, time required for staff to complete the FAA Remote Pilot Certification process to be legally allowed to fly a drone, and the cost of providing drone images to PFA GRANTS every five years. If the stewardship calculator provided with the grant application does not include these expenses, the grantee must update the calculator to incorporate the expenses and secure additional stewardship funds to ensure adequate resources for drone images over time.
    - Use of drones requires grantees follow Federal Aviation Administration (FAA) Guidance on Drones and comply with any state, county, local, or Tribal laws and regulations related to the use of drones.
- Non-drone aerial images (e.g., satellite and fixed wing airplane images) are not accepted currently.

Maps

- General location map
- An aerial-photo-based map of the property, depicting property boundaries, easement boundaries if different than the property boundaries, and property features, including encumbrances, described in the Baseline text. Multiple years of aerial photos are useful, but not required, for understanding the property's history.
    - If property features or encumbrances are numerous, more than one map may be necessary for legibility. Encumbrances must be labeled by document recording number, or book and page numbers if a document recording number was not assigned.
- Map(s) depicting the location of photo points
- If drone images are included in the Baseline, include a map of the property showing the location of each flight plan, to locate each flight plan in the context of the property
- Map of conservation easement zones or other easement areas with special allowances or restrictions, if applicable
- Topographical map
- Soils map
- Map depicting the location and extent (polygons) of priority ecological systems and plant communities, as determined by GPS
- Map depicting the location and extent (polygons) of invasive plants as determined by GPS

Baseline Acceptance and Acknowledgment

The Baseline must include a statement of acceptance and acknowledgement, signed by the parties to the conservation easement. The statement will also be an exhibit to the conservation easement. Refer to PFA GRANTS's conservation easement for the wording of the acceptance statement.

Include the landowner's agreement to future drone use if the Baseline includes drone images for a conservation easement project.

Baseline Format

The Baseline should consist of a single PDF file, with all maps and photographs incorporated as appendices. A single PDF file eliminates the need to ensure that multiple Baseline files are organized and kept together as a unified document.

PFA GRANTS will only accept a Baseline consisting of more than one PDF file if photographs or drone images are too large to include in a single PDF file. In that case, the grantee must minimize the number of additional files, to enable the information to be easily accessed during monitoring. The Baseline must contain a statement identifying and incorporating all other files by reference, for example:

"A total of 50 images were captured from photo points 1 through 10 on May 1, 2024. The images, which are incorporated into the Baseline by this reference, are contained in the PDF file named 'NorthwestPreserveBaselinePhotos.PDF' which is stored together with this signed document."

Specific Examples Requiring a Description of Restored Conditions

The Private Forest Accord (PFA) Grant Program requires the Baseline Inventory Documentation to include a formal Description of Restored Conditions when a property requires substantial ecological modification to achieve the targeted aquatic or amphibian habitat outcomes that form the basis of the grant award.

The following examples illustrate the types of riparian and aquatic restoration projects that require Applicants to submit a highly detailed Description of Restored Conditions:

Example 1: Riparian Fish Passage Restoration (Culvert and Barrier Removal)

A private forest property contains a fish-bearing stream where a legacy logging road culvert completely blocks upstream migration for native salmonids and covered amphibian species. The surrounding riparian zone is physically degraded due to historical vehicle staging. The grant application states that the property interest is being acquired to remove the blocking structure, install a fully compliant fish-passage bridge, and re-engineer the stream banks. The property does not meet prioritization standards in its current state; it only achieves priority status because of the Applicant's explicit intent to restore natural hydrologic connectivity and fish passage capacity under ODFW standards.

Example 2: Conifer Stream Buffer Restoration (Legacy Hardwood Conversion)

A property encompasses a perennial stream corridor that was historically clear-cut and has since been dominated by a dense, monotypic stand of invasive reed canary grass and promotional alder brush. The current canopy lacks the structural diversity and conifer component necessary to provide long-term stream shading, stream bank stability, and future large woody debris recruitment. The application specifies that the tract is being acquired to systematically clear the invasive vegetation and establish a diverse, native conifer-dominated riparian buffer. Because the existing habitat does not currently provide high-quality conditions for covered PFA species, a Description of Restored Conditions is mandatory to outline the multi-year trajectory toward a functioning conifer buffer system.

Example 3: Instream Habitat Complexity Enhancement (Large Woody Debris Placement)

A property contains a highly simplified, incised stream channel that has been historically cleared of all wood and boulders to facilitate downstream log drives. The channel lacks the pools, spawning gravels, and side-channel alcoves essential for stream-dwelling amphibians and juvenile salmonid rearing. The application outlines a comprehensive restoration strategy to place large woody debris complexes and engineered log jams using heavy machinery within the active channel. A Description of Restored Conditions is required to contrast the current degraded, high-velocity channel metrics against the intended complex, low-velocity rearing habitats that the project will actively construct.

PFA GRANTS recognizes that Baselines are signed before or at the time of a property purchase, whereas acquisition grantees typically develop detailed restoration plans for a property only after its purchase. The Description of Restored Conditions does not need to be highly detailed, but should include best-available information, in narrative and map form, about the type, extent, and quality of ecological systems that will exist upon completion of restoration activities.