

# PAR

Property Analysis Record

## *“Planning for Conservation in Perpetuity”*

### **FOR EXAMPLE PURPOSES ONLY**

*This PAR Report has been prepared specifically to serve as an example of the output generated by CNLM’s PAR App. This is not based on any real property or preserve and the data do not reflect any actual costs or rates.*

*This is a fictitious PAR report and any resemblance to any actual real property is coincidental.*



Title: Serendipity Ranch PAR

Merced, California

PAR Code/ Internal Reference: P550

Prepared For: Land Trust of Central California

Prepared By: Rory Smith, M.S.

Land Trust of Central California

Date: August 9, 2018

Contents: The PAR report potentially contains 11 sections, from (I) Property Information to (XI) Labor and Contract Summary. Some sections, if not relevant, may not be included in this report.



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## I. Property Information

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**PAR Name:** Serendipity Ranch PAR

**Preserve Name:** Serendipity Ranch

**PAR Code:** P550

**Size of Conserved Area:** 500 acres

**Part of Larger Anticipated Preserve?** No

**County:** Merced

**City, State, Zip Code:** California

**APN(s):** 051-011-005

**Prepared For:** Land Trust of Central California

**Prepared By:** Rory Smith, M.S., Land Trust of Central California

**Date of Site Visit(s):** 05-21-2018

**Date PAR Initiated:** 08-07-2018

### **Purpose of Preservation**

**Preserve Type:** Non-mitigation

**Type:** Purchase

**Primary Purpose:** Endangered species

**Secondary Purpose:** Sensitive or protected habitat

## II. Project Structure

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Role	Contact	PAR Contact?
Regional Preserve Manager	Contact Person: Rory Smith Entity: LTCC Address: 343 Lost Lake Avenue, Merced, CA 95340 Phone: (555) 755-0000 Email: RSmith@LTCC.org	Yes
PAR Preparer	Contact Person: Jenna Mae Entity: LTCC Address: 343 Lost Lake Avenue, Merced, CA 95340 Phone: (555) 755-0000 Email: JMae@LTCC.org	
Endowment Manager - Stewardship	Contact Person: Erik R. Andersen Entity: LTCC Address: 343 Lost Lake Avenue, Merced, CA 95340 Phone: (555) 755-0010 Email: EAndersen@LTCC.org	

## III. Property Details

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### Title Report

Description	Status	Comments
Access Easement		PG&E access easement for line maintenance

### Tax and Fees

Description	Status	Relevant to PAR?	Included in PAR costs?	Number of years until exemption?	Comment
School		Yes	Yes		
Fire		Yes	Yes		
Ad Valorem (Property)		Yes	Yes	1	Expect to be exempt

## IV. Preserve Context

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### Adjacent Land Use

Type	Specific Description
High-speed rail	Potential high-speed rail in vicinity in future
Agriculture	Beef cattle grazing nearby

### Adjacent Developed Features

Type	Specific Description
Vertical Utility Structures (windmill, power transmission lines/poles, cell towers, etc.)	Transmission lines on site and nearby

### Hydrological and Geographic Context

Type	Specific Description/Source Classification
Ecoregion	California annual and perennial grassland

### Regional and Adjacent Protection

Type	Specific Description
Adjacent Protected Wetlands	Protected vernal pool preserve adjacent to property

## V. Site Features, Use, and Responsibilities

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### Site/Preserve Use and Responsibilities

Category	Description	Allowed?	Required?	Responsible Party or Entity	Comments
Fuel Modification	Fuel modification	No	No	Land owner	No onsite fuel modification zones
Education/Research	Education/Research	Yes	No	Land owner	Some educational and research use may be allowed; owner will review all requests and proposals for consistency with Preserve objectives and site sensitivity
Recreation	Hiking	Yes	No	Land owner	Trail to be developed onsite for hiking only

**Site/Preserve Features and Responsibilities**

No Site/Preserve Features and Responsibilities Data

**VI. Biological Assessment**

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**Animals**

Scientific Name	Common Name	Taxa	Listing Status	Occurrence Status	Comments
<i>Athene cunicularia</i>	Burrowing owl	Bird	State-Candidate;State-Species of Special Concern	Documented on site	
<i>Aquila chrysaetos</i>	Golden eagle	Bird	Other	Documented on site	Bird of Conservation Concern
<i>Vulpes macrotis mutica</i>	San Joaquin kit fox	Mammal	Federal-Endangered;State-Threatened	Documented in vicinity	
<i>Rana aurora draytonii</i> ( <i>Rana draytonii</i> )	California red-legged frog	Amphibian	Federal-Endangered	Potential	
<i>Ambystoma californiense</i>	California tiger salamander	Amphibian	Federal-Threatened; State-Threatened	Confirmed	

**Plants and Fungi**

Scientific Name	Common Name	Taxa	Listing Status	Occurrence	Comments
<i>California macrophylla</i>	Round-leaved filaree	Angiosperm	CNPS Rare Plant Rank (CRPR) 1B	Documented in vicinity	Three CNDDDB records within 5 miles of Property
<i>Caulanthus californicus</i>	California jewelflower	Angiosperm	Federal-Endangered	Potential	
<i>Caulanthus lemmonii</i>	Lemmon's jewelflower	Angiosperm	CNPS Rare Plant Rank (CRPR) 1B	Documented on site	

**Natural Communities**

Description	Alt Veg Classification	Area	Comments
Annual Grassland (AGS)		400 acres	
Blue Oak Woodland (BOW)		30 acres	
Mixed Chaparral (MCH)		35 acres	
Valley Foothill Riparian (VRI)		35 acres	

Source: California Department of Fish and Wildlife. California Interagency Wildlife Task Group. 2014. Sacramento, CA.

**Non-Natives**

Scientific Name	Common Name	Taxa	Impact	Comments
<i>Erodium</i> spp.	Non-native fillarees	Angiosperm		
<i>Avena</i> spp.	Clovers, oats	Angiosperm		
<i>Bromus</i> spp.	Bromes	Angiosperm		

Notes/Comments: Non-native plant species not necessarily threatening conservation values at present

**VII. Permits and Agreements**

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**Preserve Creation**

Agency Type	Regulatory Agency	Type of Permit	Available for Review?	Description/Date/Permit #
Federal	U.S. Fish and Wildlife Service	Biological Opinion	Yes	USFWS BO/Jan 26 2018/#12345

**Preserve Stewardship**

Agency Type	Regulatory Agency	Type of Permit	Comments
Federal	U.S. Fish and Wildlife Service	USFWS 10(a)(1)(A)	Required for monitoring listed species

**VIII. Documents List**

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Document Description	Author/Source	Date/Version	Comments
Recent Property Tax Bill		December 2017	
Preliminary Title Report	American Title	January 2018	
Hazardous Materials Evaluation		April 17, 2016	
Habitat Management Plan	Might Green Consultants, Inc.	July 29, 2017	Provides little detail; will require revision soon
Biological Opinion (USFWS)	USFWS /#12345	Jan 26, 2018	
Aerial Photographs		2016	

## IX. Tasks and Cost Analysis

### Initial and Capital

Task	Specific Description	Unit	# of Units	Cost per Unit	# of Years	Contin (%)	Subtotal	Admin (%)
<b>Biological Surveys</b>								
Monitoring	Vegetation, RDM, camera traps, etc.	L. Hours	360	\$62.50	3	8%	\$72,900.00	20%
<b>Data Management &amp; Reports</b>								
Management Plan	Initial Report	L. Hours	60	\$62.50	1	8%	\$4,050.00	20%
Annual reports, plans	Annual stewardship report, work plan, budget	L. Hours	28	\$62.50	3	8%	\$5,670.00	20%
Other reports, meetings	County pesticide reports, monthly reports, PM mtgs, etc.	L. Hours	3	\$62.50	3	8%	\$607.50	20%
<b>Habitat Maintenance &amp; Enhancement</b>								
Patrol	Site visit, general reconnaissance	L. Hours	130	\$62.50	3	8%	\$26,325.00	20%
Exotic invasives control	Herbicide application, etc.	L. Hours	40	\$62.50	3	8%	\$8,100.00	20%
Exotic Plant Control	Herbicide	Gallon	1	\$35.00	1	8%	\$37.80	20%
<b>Office Maintenance</b>								
Office equipment, services	Phone	Item	0.35	\$1,200.00	3	8%	\$1,360.80	20%
Computer	Laptop and Software	Item	0.35	\$1,000.00	1	8%	\$378.00	20%
<b>Operations</b>								
Training, professional development	Professional development	Item	1		3	8%	\$0.00	20%
Insurance	Liability/Fee	Annual	1	\$300.00	3	8%	\$972.00	20%
Staff training	Pesticide safety, prof development	L. Hours	8	\$62.50	3	8%	\$1,620.00	20%
Project Accounting	Setup and Maintain	Item	0	\$0.00		8%	\$0.00	20%
Professional dues, organization level	LTA, LTAC, CCLT fees	Unit	1	\$75.00	3	8%	\$243.00	20%
Property fees, taxes	District fees, taxes, assessments	Item	1	\$500.00	3	8%	\$1,620.00	20%
Coordination	With Onsite Manager & grazing lessee	L. Hours	45	\$62.50	3	8%	\$9,112.50	20%
Legal Fund	Establish Fund (% endow.)	% endow. - Legal	0	\$0.00		8%	\$26,477.83	20%
Insurance	Liability/Fee	Acre	500	\$0.40	3	8%	\$648.00	20%
Building insurance	Insurance for Manager house	Item	1	\$400.00	3	8%	\$1,296.00	20%
Research and Development Fund	Establish Fund (% endow.)	% endow. - R&D	1	\$0.00		8%	\$26,477.83	20%
Decision support, report review	Oversight, support	L. Hours	20	\$85.00	3	8%	\$5,508.00	20%
<b>Public Services</b>								
Outreach	Public/NGO tours, research requests, etc.	L. Hours	40	\$62.50	3	8%	\$8,100.00	20%

Task	Specific Description	Unit	# of Units	Cost per Unit	# of Years	Contin (%)	Subtotal	Admin (%)
<b>Site Construction &amp; Maintenance</b>								
Signs	Boundary Signs	Item	25	\$10.00	1	8%	\$270.00	20%
Lock	Padlock	Item	6	\$10.00	1	8%	\$64.80	20%
Fence	Perimeter fence replacement/ re-investment	Lin. Ft.	115420	\$4.50		8%	\$0.00	20%
Fence, repair	Materials	Item	1	\$150.00	3	8%	\$486.00	20%
Fence, Repair	Labor	L. Hours	15	\$62.50	3	8%	\$3,037.50	20%
Gate	Vehicle access to pastures	Item	4	\$200.00	1	8%	\$864.00	20%
Road maintenance	Road maintenance	Contract	0			8%	\$0.00	20%
Housing restoration and maintenance	Preparation of Boss House for PM use	Item	1	\$1,500.00	3	8%	\$4,860.00	20%
<b>Vehicle &amp; Field Equipment</b>								
Travel, mileage	Roundtrip site visits, plus onsite	Mile	4000	\$1.18	3	8%	\$15,292.80	20%
PM vehicle	Percent contribution to additional vehicle	Item	0.35	\$30,000.00	1	8%	\$11,340.00	20%
Tools and small equipment	Misc. Tools	Item	1	\$150.00	1	8%	\$162.00	20%
<b>Water Management</b>								
		Item	0			8%	\$0.00	20%
			0			8%	\$0.00	20%

**Subtotal:** \$237,881.36  
**Administration:** \$47,576.28  
**Total:** \$285,457.64

**Perpetual**

Task	Specific Description	Unit	# of Units	Cost per Unit	Freq (Yrs)	Contin (%)	Subtotal	Admin (%)
<b>Biological Surveys</b>								
Monitoring	Vegetation, RDM, camera traps, etc.	L. Hours	360	\$62.50	1	8%	\$24,300.00	20%
<b>Data Management &amp; Reports</b>								
Management Plan	Initial Report	L. Hours	50	\$62.50	12	8%	\$281.25	20%
Annual reports, plans	Annual stewardship report, work plan, budget	L. Hours	28	\$62.50	1	8%	\$1,890.00	20%
Other reports, meetings	County pesticide reports, monthly reports, PM mtgs, etc.	L. Hours	3	\$62.50	1	8%	\$202.50	20%
<b>Habitat Maintenance &amp; Enhancement</b>								
Patrol	Site visit, general reconnaissance	L. Hours	130	\$62.50	1	8%	\$8,775.00	20%
Exotic invasives control	Herbicide application, etc.	L. Hours	40	\$62.50	1	8%	\$2,700.00	20%
Exotic Plant Control	Herbicide	Gallon	1	\$35.00	2	8%	\$18.90	20%



Task	Specific Description	Unit	# of Units	Cost per Unit	Freq (Yrs)	Contn (%)	Subtotal	Admin (%)
<b>Office Maintenance</b>								
Office equipment, services	Phone	Item	0.35	\$1,200.00	1	8%	\$453.60	20%
Computer	Laptop and Software	Item	0.35	\$1,700.00	5	8%	\$128.52	20%
<b>Operations</b>								
Training, professional development	Professional development	Item	1	\$300.00	1	8%	\$324.00	20%
Insurance	Liability/Fee	Annual	1	\$300.00	1	8%	\$324.00	20%
Staff training	Pesticide safety, prof development	L. Hours	8	\$62.50	1	8%	\$540.00	20%
Project Accounting	Setup and Maintain	Item	0			8%		20%
Professional dues, organization level	LTA, LTAC, CCLT fees	Unit	1	\$75.00	1	8%	\$81.00	20%
Property fees, taxes	District fees, taxes, assessments	Item	1	\$500.00	1	8%	\$540.00	20%
Coordination	Initiate relationships with Onsite Manager and grazing lessee	L. Hours	32	\$62.50	1	8%	\$2,160.00	20%
Legal Fund	Establish Fund (% endow.)	% endow. - Legal	0			8%	\$0.00	20%
Insurance	Liability/Fee	Acre	500	\$0.40	1	8%	\$216.00	20%
Building insurance	Insurance for Manager house	Item	1	\$400.00	1	8%	\$432.00	20%
Research and Development Fund	Establish Fund (% endow.)	% endow. - R&D	0			8%	\$0.00	20%
Decision support, report review	Oversight, support	L. Hours	20	\$85.00	1	8%	\$1,836.00	20%
<b>Public Services</b>								
Outreach	Public/NGO tours, SARAs, web info, etc.	L. Hours	30	\$62.50	1	8%	\$2,025.00	20%
<b>Site Construction &amp; Maintenance</b>								
Signs	Boundary Signs	Item	25	\$10.00	8	8%	\$33.75	20%
Lock	Padlock	Item	6	\$10.00	5	8%	\$12.96	20%
Fence	Perimeter fence replacement/ re-investment	Lin. Ft.	115420	\$4.50	30	8%	\$18,698.04	20%
Fence, repair	Materials	Item	1	\$100.00	1	8%	\$108.00	20%
Fence, Repair	Labor	L. Hours	15	\$62.50	1	8%	\$1,012.50	20%
Gate	Vehicle access to pastures	Item	10	\$200.00	15	8%	\$144.00	20%
Road maintenance	Road maintenance	Contract	1	\$3,000.00	1	8%	\$3,240.00	20%
Housing restoration and maintenance	Preparation of Boss House for PM use	Item	1	\$1,500.00	1	8%	\$1,620.00	20%
<b>Vehicle &amp; Field Equipment</b>								
Travel, mileage	Roundtrip site visits, plus onsite	Mile	4000	\$1.18	1	8%	\$5,097.60	20%
PM vehicle	Percent contribution to additional vehicle	Item	0			8%		20%
Tools and small equipment	Misc. Tools	Item	1	\$150.00	5	8%	\$32.40	20%

**Subtotal:** \$77,227.02  
**Administration:** \$15,445.40  
**Total:** \$92,672.42

## X. Financial Summary

Item Description	Total
<b>Financial Requirements—Initial and Capital</b>	
Management Costs	\$224,183
Contingency Expense	\$13,698
Administrative	\$47,576
<b>Total Costs</b>	<b>\$285,458</b>
<b>Financial Requirements—Perpetual</b>	
<b>1. Average Annual Perpetual Costs</b>	
Management Costs	\$71,507
Contingency Expense	\$5,721
Administrative	\$15,445
<b>Total Costs</b>	<b>\$92,672</b>
<b>2. Endowment</b>	
Endowment to Produce Income of \$92,672	\$2,647,783
<i>Stewardship costs are based on 3.5% of endowment earnings per year</i>	
<b>Total Funding Required</b>	<b>\$2,933,241</b>
<i>Includes Initial and Capital Total Cost plus Endowment</i>	

## XI. Labor and Contract Summary

### Labor Summary

Position	Total Initial and Capital Hours	Total Initial and Capital Cost*	Total Perpetual Hours^	Total Perpetual Cost**	%Full-time Equivalent (FTE)^
Preserve Manager	2,067.00	\$139,523	650.20	\$43,886	34.59%
Conservation Science Director	60.00	\$5,508	20.00	\$1,836	1.06%

\* Includes contingency cost

^ Represents average annual labor costs or time (hours)

**Number of hours used to determine full-time equivalent:** 1,880

**Contract Summary**

Type	Initial and Capital		Perpetual^	
	Total Units	Cost*	Total Units	Cost*
Items/Other		\$1		\$3,240
Contract Hours				
<b>Summarized Costs</b>				
<b>Contract Subtotal</b>		\$0		\$3,240
<b>Contract Admin</b>		\$0		\$648
<b>Contract Total</b>		\$0		\$3,888

\* Includes contingency cost

^ Represents average annual labor costs or time (hours)