



N.C. Department of Agriculture & Consumer Services
N.C. ADFP Trust Fund
Baseline Documentation Report Requirements and Checklist
for Conservation Easement Programs



Grantees:

The Grantee is responsible for verifying that subcontractors meet the requirements described below and for supplying the subcontractors with the attached checklist and narrative. Failure to do so may result in the rejection of due diligence items and subsequent delays.

Baseline documentation reports (BDRs) establish the condition and characteristics of the land parcel at the time of conservation easement closing and serve as the basis for easement management and monitoring. Therefore, the BDR is critical to enforcing the terms and conditions of the easement in perpetuity.

BDRs also help document how the land's characteristics support the conservation easement's purposes and help justify the expenditure of public funds.

BDRs include narrations, pictures, and maps to provide a complete understanding of a given parcel. It is recognized that no two land parcels are the same, and there is an expected level of variation in the content of BDRs. However, the following requirements, where applicable, are considered a minimum that should be found in the document.

For Agricultural Conservation Easement Program Agricultural Land Easements (ACEP-ALE) or RCPP transactions, these requirements and instructions are in addition to any closing instructions provided by the United States Department of Agriculture (USDA) Natural Resource Conservation Service (NRCS).

The Parties to this transaction are as follows:

State of North Carolina: N.C. Dept. of Agriculture & Consumer Services; NC ADFP Trust Fund
2 West Edenton Street
Raleigh, NC 27601

Landowner/Grantor (name & address below):

_____, _____

Eligible Entity/Grantee (name & address below):

_____, _____



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Baseline Documentation Report Preparer Qualifications

- Have current licensure as an environmental engineer or be a qualified employee of the land trust or Soil and Water Conservation District. The individual's credentials must be recorded in the baseline report.
- Agree to complete the report pursuant to the requirements contained herein and furnish the Grantee and, subsequently, NCDA&CS an electronic copy for review.
- Agree to produce maps and photographic documentation that are properly and accurately drawn, revealing all the information developed by and during the survey of the property.
- Agree to provide an unbiased portrayal of the property, including but not limited to assessing environmental conditions such as trash, debris, and abandoned vehicles.

Grantee Responsibilities

- Provide all necessary documents to staff or environmental engineers for reference and review the report *before* submission to NCDA&CS staff.
- If applicable, forward any copies of the report to partnering funding agencies.
- Maintain the acreage and other calculations determined in the survey as the conservation easement across *ALL* documents presented within the report.
- Ensure that all due diligence items within the baseline documentation report are versions that have been previously approved by NCDA&CS staff.
- Review the document in detail with the landowner, emphasizing the conservation easement restrictions as dictated by the conservation easement deed. After reviewing the document, the entity and landowner will sign the acknowledgment forms.
- If a BDR was completed more than three months prior to the execution of the conservation agreement, or if there was a known event or disturbance, the preparing organization must revisit the property to ensure that it accurately represents the current conditions and provide the date of the visit to NCDA&CS staff. NCDA&CS may also require a supplemental statement that attests to current conditions.



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By signing this “Baseline Documentation Report Requirements and Checklist for Easement Programs,” I certify that I meet all specified requirements and agree to complete all required deliverables and outputs in accordance with the prescribed standards in this Contract. I further acknowledge that my execution of these obligations ensures that State funds received for services provided are utilized in a manner that safeguards the interests of the State of North Carolina. If any certification of qualifications is found to be false, or if the deliverables or outputs are incomplete or fail to meet the prescribed standards, the State of North Carolina reserves the right to withhold grant payments until such deficiencies are corrected to the State’s satisfaction.

Signature of Preparer

Date

Name of Preparer

By signing this “Baseline Documentation Report Requirements and Checklist for Easement Programs,” I concur with the preparer’s qualifications and agree to comply with the requirements.

Signature of Grantee Representative

Date

Name and Title of Grantee Representative



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REQUEST TO ADFP TRUST FUND FOR APPROVAL OF SUBCONTRACTING

This form is required to subcontract with a qualified preparer who is not an employee of the Grantee entity.

Grantee:

Contract Number:

Pursuant to the General Terms and Conditions of the Contract* between the Grantee and the Agency, Grantee hereby requests approval of the Subcontractor, _____, to assist in carrying out the purposes of the above-referenced Contract.

Signature of Grantee

Name of Grantee

Date

☐ Subcontracting Approved

☐ Subcontracting Denied

Signature of Director

Name of Director

Date

***Subcontracting:** The Grantee shall not subcontract any of the work contemplated under this Contract without prior written approval from the Agency. Any approved subcontract shall be subject to all conditions of this Contract. Only the subcontractors or subgrantees specified in the contract documents are to be considered approved upon award of the Contract. The Agency shall not be obligated to pay for any work performed by any unapproved subcontractor or subgrantee. The Grantee shall be responsible for the performance of all of its subgrantees and shall not be relieved of any of the duties and responsibilities of this Contract.



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Baseline Documentation Report Checklist and Required Elements

Title Page:

	Title Page Must Include: <ul style="list-style-type: none"> • Title of the easement as stated in the Contract, • ADFP Trust Fund tracking number, • NCDA&CS contract number, • Date of completion and date of conveyance, • Name, title, and affiliation of the author(s)
	Table of Contents with Page Numbers: Section Headers, Maps, Photos, Addenda
	Landowner Contact Information: Names, addresses, email, phone numbers, etc.

Section 1: Purpose and Easement Holder

	Brief statement of purpose for BDR
	Purpose of the Conservation Easement: Conservation Easement Values as stated under IRC Section 170(h): <ul style="list-style-type: none"> • Required: <ul style="list-style-type: none"> ○ Agricultural Farmland and/or Woodlands/Forestry • Optional or Secondary: <ul style="list-style-type: none"> ○ Wildlife Habitat ○ Surface Waters ○ Rural and Scenic Vistas ○ Proximity to Protected Lands
	Identification, qualifications, and parcel selection methods of the easement holder

Section 2: Property Background

	Total parcel acreage and easement acreage (if different)
	Location and Physical Setting – General description of the parcel and adjacent land
	Enrollment in a Voluntary Agricultural District (VAD) or Enhanced Voluntary District (EVAD) (if applicable)
	Enrollment in Century Farm, Bicentennial Farm, Got to Be NC, or other programs offered through NCDA&CS (if applicable)
	History of the parcel, including description of past farming operations and land use
	Any other significant features identified by the Grantee or landowner
	<i>Map: Imagery of the area within 5 miles of the easement property, showing the specific location of the parcel. Include all other easements and protected lands in proximity (if applicable).</i>



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	<i>Map: General reference map scaled to show the entire county boundary. The map must show the specific location of the easement property, and may include municipalities, major interstates or highways, and other significant landmarks.</i>
	<p>Discussion of environmental conditions.</p> <p>Identify any areas for potential monitoring or summary of Phase or Phase II Environmental Site Assessment findings and subsequent remediation actions (The complete EA will be included in the addenda).</p> <ul style="list-style-type: none"> Any recognized environmental conditions, including potential or de minimis, must be discussed. If lead and asbestos were identified, the environmental warranty found within the easement template must be included, as well as the indemnity clause signed by the landowner. Any notations of trash and debris must be discussed, and a monitoring plan must be established.

Section 3: Existing Land Use and Management

	Landowner objectives for the management of the parcel and current agricultural practices and goals.
	Describe any recorded, verbal, or otherwise allowable leases. Provide name and contact of individual(s) and allowable use and or restrictions (if applicable).
	<p>Statement on the general condition and management of each land use type (including cropland, forestland, pastureland, mixed use, etc.).</p> <p>Include acreage and percentage of each land use in the easement (if applicable)</p>
	<p>Include a copy of the current USDA-NRCS or local Soil and Water Conservation District conservation plan (if applicable under HEL status)</p> <ul style="list-style-type: none"> If managed for HEL, include: Form NRCS-CPA-026 “<i>Highly Erodible Land and Wetland Conservation Determination</i>” which documents the fields and acreage of HEL, along with a map labeling fields HEL or NHEL (non-highly erodible land).
	<p>Statement on Potentially Highly Erodible Land (PHEL) soils.</p> <p>Description of soils, slope, etc., (if applicable).</p>
	<i>Map: Aerial or satellite imagery of the property with the easement boundary map overlay. Include callouts of significant features, including building envelopes, and legal access (ingress/egress) from a publicly maintained road.</i>

Section 4: Documentation of existing conditions and Summary of Grantors’ and Grantee’s Rights and Restrictions

	List and describe Restricted Uses of the Property -Summary of Grantee’s Restrictions
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	List and describe Permitted Uses of the Property -Summary of Grantee's Rights
	List and describe all existing human modifications, including all roads, ROWs, utility easements, cemetery plots, etc.
	List in table form, each permanent structure or other area that meets the impervious surface qualification. Identify dimensions, approximate impervious surface, and corresponding photo for each.
	Calculate the total extent of impervious structures.
	Calculate the maximum allowable impervious surface area within the easement.
	Calculate the remaining allowable surface area within the easement, converted to square feet and acres.
	List all Building Envelopes by use and type, with accompanying acreage.
	<i>Map: All human modifications to the property with the following labeled: structures, roads, trails, dikes and impoundments, wells, fences, utility lines and corridors, cemeteries, trash piles/dumps, etc., within the easement area and farmstead building envelopes identified.</i>

Section 5: Land Parcel Topography and Soil Types

	A short paragraph summarizing the general topography of the easement area, highlighting any extremes.
	Discussion of all soil types within the land parcel, including a description of each.
	Table of all soils found within the easement area. Include soil type, name, acreage, percent of total soils in the easement, and designation as prime, unique, or statewide importance.
	<i>Map: USGS US Topo or 7.5-minute quadrangle topo map (overlay of an aerial/satellite view, if possible) of the property or the best available map showing the property's elevation profile</i>
	<i>Map: USDA-NRCS soils map (available through USDA Web Soil Survey) with appropriate labels that match figures in the table.</i>
	<i>Map: Highly Erodible Soils (overlay of an aerial/satellite view, if possible) of the property with any building envelopes</i>

Section 6: Description of the Property's Natural Features

	List and describe all wildlife habitats and natural communities of significance found within the easement area (e.g., common wildlife, rare and endangered species, etc.).
	<i>Optional: Map: Wildlife and natural communities</i>
	General description of forest types within the easement area (if applicable).
	<i>Map: Stand or reference map with labeled stands</i>



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	List and description of all significant aquatic features (streams, water bodies, wetlands, major waterways, etc.).
	<i>Map: Aquatic map (overlay of an aerial/satellite view, if possible)</i>
	<i>Map: General hydrology map</i>

Section 7: Archeological and Historical Features

	List and description of all historical features of significance, including cemeteries, monuments, etc. (if applicable).
	<i>Map: Archeological and historical features on the property (if applicable)</i>

Section 8: Photographic Documentation

	General landscape pictures that are representative of the easement area.
	Photographs at regular intervals along the property line that capture the property in its entirety, including photos from each property corner, and highlighting ingress and egress or access points
	Photographs of each permanent structure within each building envelope or farmstead area. These must match the photo points with the impervious surface table.
	All other impervious surfaces in the easement, if not included above
	Photographs of any other human modifications to the property (including roads, ditches, dams, etc.)
	Photographic index with descriptions of each photo
	<i>Map: Documentation map with photos numbered. Include a compass direction to note the direction the photo was taken</i>

Section 9: Addenda

	NCDA&CS Approved or Recorded Survey
	Abbreviated biography with qualifications of the author
	Approved Environmental Assessment
	Approved Conservation Plan, Forest Management Plan, or Both (if applicable)

Section 10: Signature Pages

	Declaration of Report Accuracy with authorized signature of the Grantee organization
	Declaration of Report Accuracy and Acceptance (Grantee) with ALL landowners' signatures
	Signed easement restriction acknowledgment form



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	Attestation (optional)
	Declaration of Reliance and Certification of Record (optional)

Description of Baseline Documentation Report (BDR) Items

Title Page:

Include the title of the easement as stated in the ADFP Trust Fund contract (e.g., Rocky Ridge Farm Easement), ADFP Trust Fund tracking number, NCDA&CS contract number, date of the BDR site visit, date of certification, and name, title, and affiliation of the BDR author(s).

- **Table of Contents:** Include all section headers, maps, and photographic documentation with automatically generated page numbers.
- **Landowner Contact Information:** Names, addresses, email, phone numbers, etc. of landowners. This may also include the names, email addresses, and phone numbers of any land managers, lessees, gatekeepers, etc., as appropriate. Email addresses are essential.
 - **Please ensure that you highlight the primary contact and any other associated landowners.**

Section 1: Purpose and Easement Holder

- **Purpose of the Conservation Easement:** Briefly summarize the purposes as found in the easement document. This should include the conservation values from the easement deed and elaborate on the landowners' objectives for land preservation and agricultural value.
 - Include a brief statement that the purpose of the BDR is to document the property's conservation values and existing conditions, provide a basis by which to measure compliance with the conservation agreement, and provide information for annual monitoring of the property.
 - Include a disclaimer that the BDR does not preclude the use of other information for purposes of enforcement.
 - Specifically, regarding the former, the "conservation purposes" that **must be referenced** and are stated under Internal Revenue Code Section 170(h) are:
 - i. The preservation of land areas for outdoor recreation by, or the education of, the public;
 - ii. The protection of a relatively natural habitat of fish, wildlife, or plants, or a similar ecosystem;
 - iii. The preservation of open space (including farmland and forest land) where such preservation is for the scenic enjoyment of the public, or pursuant to a clearly delineated Federal, State, or Local governmental conservation policy, and will yield a significant public benefit;



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- iv. The preservation of a historically important land area or a certified historic structure.
 - *Example: The Grantee's primary intent is to conserve and protect productive agricultural and forestry uses, and secondarily to encourage sustainable management of soil resources. Other goals in conserving this property include promoting non-commercial recreational opportunities and activities, as well as preserving the natural resources and scenic values of the protected property for present and future generations.*
- Identification, qualifications, and parcel selection methods of the easement holder: Briefly describe the easement-holding entity, highlighting the entity's qualifications to hold easements and intent to monitor.
- Describe the selection methods and reasoning behind the choice of this land parcel for conservation.

Section 2: Property Background:

Include a paragraph summarizing the property, including the following information:

- An overall description of the property and background information describing the conservation project.
 - The description and background are extremely valuable in helping subsequent generations understand the easement.
- A well-prepared BDR will provide a context for the easement by including a section that describes how the property fits within a larger conservation objective, how it was funded using public and/or private dollars, and how another conservation organization or governmental entity may refer to the project.
- If tenants are on the property or it is leased for grazing, timber harvesting, or other agricultural activities, this information should also be included in this section.

There must be some discussion of the following:

- Discussion on how the easement addresses the entities' mission and goals. Such documentation can include copies of relevant governmental policies, references to other projects the entity has completed in the area, descriptions of the funding sources received for the project, and other relevant information.
- Legal description of the property, including the property deed reference and the recording date of the conservation agreement
- Directions to the property from the easement-holding entity office, including directions for legal access, parking location, and notes on gated or keyed entries.
- Total parcel acreage and easement acreage (if different). The acreage must match the NCDA&CS-approved survey and be consistent throughout the document. Please do not include +/- as the surveyor has certified the acreage.



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- General location in the county.
- Enrollment in a Voluntary Agricultural District (VAD) or Enhanced Voluntary District (EVAD) (if applicable).
- Enrollment in Century Farm, Bicentennial Farm, Got to Be NC, or other programs offered through NCDA&CS (if applicable).
- History of the parcel, including description of past farming operations and land use.
- Location and Physical Setting, including a general description of the landscape and farming operations in the general area, including adjacent land.
- Discussion of the Environmental Audit (EA) or Environmental Site Assessment (ESA) regarding recognized environmental concerns, any items addressed prior to recordation, or lingering concerns for ongoing monitoring.
 - Trash, debris, or environmental conditions otherwise indicated in the easement deed as prohibited must be documented and discussed.
 - If the EA, ESA, or TSP included trash and debris, a discussion of the current status must be included.
 - If the identified trash, debris, abandoned vehicle, or abandoned machinery are not removed before easement recordation, the reason must be stated with the proper certification:
 - There are no current negative environmental impacts due to the trash and debris, and it is limited and localized in scope.
 - Due to the location of the abandoned vehicle or machinery, there is no negative impact on the agricultural operation, and it is impractical to remove.
 - The following clause must be included:
 - If conditions change to where there are negative environmental or agricultural impacts, the easement-holding entity will be required to take proper action to remedy.
 - If a Phase II is required, this will also be included, along with a narrative of findings and remediation activities. Areas and actions for future monitoring must also be discussed.
 - The Environmental Audit (EA) or the Environmental Site Assessment (Phase I) will be attached in the addenda in its entirety.
 - If above-ground storage tanks or underground storage tanks are identified, the discussion from the EA, ESA, or TSP narrative must be included and expanded to identify future monitoring.
 - If structures were identified as potentially containing lead and asbestos:
 - The narrative from the EA, ESA, or TSP must be included and expanded to identify future monitoring.



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- The following conservation easement language must be noted: must be identified by survey or aerial map and by photo.
- The addenda must contain the indemnity clause signed by the landowners.
 - The NCDA&CS, its employees, agents, and assigns disclaim and will not be held responsible for Grantee's or Grantor's negligent acts or omissions or Grantee's or Grantor's breach of any representation, warranty, covenant, or agreements contained in this ALE Deed, or violations of any Federal, State or local laws, including all Environmental Laws defined in Section 5.2 including, without limitation, those that give rise to liabilities, claims, demands, losses, expenses, damages, fines, fees, penalties, suits, proceedings, actions, costs of actions, or sanctions asserted by or on behalf of any person or governmental authority, and other liabilities (whether legal or equitable in nature and including, without limitation, court costs, and reasonable attorneys' fees and attorneys' fees on appeal) to which the NCDA&CS may be subject or incur relating to the Protected Property.
 - Grantor agrees to indemnify and hold harmless NCDA&CS, its employees, the Grantee and the State of North Carolina harmless from any and all costs, claims or liability, including but not limited to reasonable attorney's fees arising from any personal injury, accidents, negligence or damage relating to the Protected Property, or any claim thereof, unless due to the negligence of Grantee or its agents, in which case liability shall be apportioned accordingly. Grantor is responsible for obtaining liability insurance covering the Protected Property with limits deemed necessary by Grantor, in their sole discretion.
 - The Grantor shall hold harmless and indemnify NCDA&CS and Grantee, its employees, agents, and assigns for any and all liabilities, claims, demands, losses, expenses, damages, fines, fees, penalties, suits, proceedings, actions, and costs of actions,



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sanctions asserted by or on behalf of any person or governmental authority, and other liabilities (whether legal or equitable in nature and including, without limitation, court costs, and reasonable attorneys' fees and attorneys' fees on appeal) to which NCDA&CS may be subject or incur relating to the Protected Property, which may arise from, but are not limited to, Grantor's negligent acts, omissions or breach of any representation, warranty, covenant or agreement contained in this ALE Deed or violations of any Federal, State, or local laws, including all Environmental Laws (defined above).

Map 1: Include imagery of the area within 5 miles of the easement property, showing the specific location of the parcel. Include all other easements and protected lands in proximity (if applicable).

Map 2: General reference map scaled to show the entire county boundary. The map must show the specific location of the easement property, and may include municipalities, major interstates or highways, and other significant landmarks.

Section 3: Existing Land Use and Management:

- Include the landowner's objectives for the management of the parcel and current agricultural practices. Also include the greater area if this easement is only one portion of a larger managed parcel.
 - What is the overall management objective of the landowner, and how does this easement area fit within it?
- Current land uses include all farm activities, property rights, and access.
- Easement broken down by land cover and use, with statements on the general condition and management of the following key areas:
 - Pasture and cropland – acreage and percent of land use in the easement (if applicable).
 - Horticultural – acreage and percent of land use in the easement (if applicable).
 - Forest and woodlands – acreage and percent of land use in the easement (if applicable). Include current (within 10 years) Forest management plan and practices (e.g., managed for maximum timber production or left to stand as a natural area for wildlife habitat).
 - Include a discussion of landowner management objectives, conservation concerns, and goals from the FMP.
 - A complete copy of the FMP will be provided in the addenda.



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- Other significant land uses – include acreage and percent of land use in the easement of each (if applicable). Provide general descriptions of uses (e.g., irrigation ponds, canals, nursery areas, non-timber forest products, etc.).
- Include a summary of the existing conservation plan and practices, and the adequacy in achieving management goals.
- Include a copy of the current (must be within five years) USDA-NRCS or local Soil and Water Conservation District conservation plan (required for crop or pastureland for NRCS partner funding or parcels with Highly Erodible Land (HEL) (optional otherwise).
 - If HEL land is present, please include a copy of the NRCS associated plan Form NRCS-CPA-026 “*Highly Erodible Land and Wetland Conservation Determination*,” which documents the fields and acreage of HEL, along with a map labeling fields HEL or NHEL (non-highly erodible land).
 - If the NRCS conservation plan identifies the parcel or fields within as HEL, the conservation plan map provided by NRCS must also be attached. The HEL status of the field level must be discussed.
- Include a discussion of soil units if considered potentially highly erodible based on soil type, slope, etc.

Map 3: Aerial or satellite imagery of the property with the easement boundary map overlay. Include callouts of significant features, including farmstead building envelopes, residential building envelopes, recreational building envelopes, existing structures, and legal access (ingress/egress) from a publicly maintained road.

Section 4: Documentation of existing conditions that relate to the easement’s restrictions and reserved rights.

The first paragraph should explicitly and completely list and describe the rights that are restricted and the rights that are retained through the easement. This would include all parts of the easement template and any additional exhibits added to the conservation easement language.

Thorough documentation of all man-made improvements on the property is required. This must include a narrative description of the improvements, their location on a map, and photographs of their condition.

The status of any reserved rights and prohibited uses contained in the conservation easement should also be documented (for example, if the easement permits a total of two single-family homes on the protected land, it is important that the baseline document how many homes exist on the land as of the easement’s date), as well as other pre-existing conditions or features that may threaten the property’s conservation values. This may include access easements for areas excluded from the easement or adjoining landowners.

Impervious Surfaces and Existing Human Modifications:



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- List each permanent structure and other impervious surfaces, showing length/width measurements. Include a calculation of the total extent of impervious structures, the maximum allowable impervious surface area within the easement (2% of total acreage) converted to square feet and acres, and the remaining allowable surface area within the easement converted to square feet and acres.
 - **The current impervious surfaces and the remaining allowable impervious surface for the conservation easement must be calculated.**
- List the current Building Envelopes with acreage for each of the approved uses:
 - Current Residential
 - Future Residential
 - Farm Support Housing
 - Recreational and Accessory Structures
 - Farmstead
- For existing impervious structures, you must include a table of each item with a corresponding photo point, the dimensions, and the calculations by square foot and acreage.

The following is an example of adequate documentation for impervious structures:

- Residential Building Envelope: Existing Residential. The primary family residence is a 1,970-square-foot brick ranch built in the 1970s. The landowner plans to keep this as the farm's primary residence.
- Farmstead Building Envelope: Farmstead- The farmstead envelope contains several farm-related structures.
 - The creamery building is a wood-sided structure that has been restored from its original form as a store building.
 - Two open-sided barns that serve as winter feed stations for cattle and hay storage are located in this area.
 - Two silage storage areas consisting of concrete bunker silos outfitted with plastic for fermentation are also located here.
 - One concrete pad that holds feed storage tanks is located to the west of the silage areas.
 - A recently dug agricultural well with the associated well house is also found in the FBE.
 - Photo points 1-7, 15-18, 33, 34. Modifications in this area include the following dimensions, and the approximate impervious surface for each of these areas is listed in Table 1:

Impervious Surface Area	Photo point	Dimensions	Impervious Surface (sq. ft.)	Impervious Surface (acres)
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Barn 1, storage shed	17	40' x 35'	1,400	0.032
Barn 2	18	12' x 24'	288	0.007
Well	1	10' x 6'	60	0.001
Creamer building	2	50' X 40'	2,000	0.046
Residence	34		2,240	0.051
Silo storage areas	5	80' x 200'	16,000	0.367
Concrete pad	16	27' x 24'	648	0.015
Total Impervious Surface			22,636 sq. ft	0.519 acres

The easement allows for a maximum impervious surface area of 2% or 85,987.20 sq. ft. (1.97 acres). Based on the above approximations, a remaining 63,351.44 sq. ft. (1.45 acres) of impervious surface is allowed under the easement.

The remaining allowable impervious surface for the conservation easement must be calculated.

Map 4: Conservation easement map with labels for all human modifications to the property, with the following labeled: i.e., structures, roads, trails, dikes and impoundments, wells, fences, utility lines and corridors, cemeteries, trash piles/dumps, etc., within the easement area. Building Envelopes must be clearly identified on the map.

Section 5: Land Parcel Topography and Soil Types:

- **Topography:** Short paragraph summarizing the general topography of the easement area, highlighting any extremes.
- **Soils:** Protecting the soil resource base and sustainable food and fiber production are essential purposes of conservation easements. Therefore, explaining the soil resources on the easement property is very important. The BDR should include a discussion of all soil types within the land parcel, including a description of each. All soil types and descriptions are available through USDA-NRCS.
- The following is provided as an example for a soils discussion:
 - There are six soil units mapped on the parcel, as shown on the General Soils Map. Four of the six soils are classified as prime farmland or farmland of statewide importance.
 - The soil types are as follows: (Note: Only one soil type is shown as an example. All soils shown on the soils map should be listed.)
 - Georgeville silty clay loam, 2-6% slopes.
 - GeB2 — Georgeville silty clay loam, 2-6% slopes. Georgeville soils are very deep, well-drained, and moderately permeable. The parent material for the soil is weathered fine-grained metavolcanic rocks. It is a



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moderately eroded soil found on uplands with elevations ranging from 300 to 750 feet. It is a well-drained soil with moderate available water capacity. *Georgeville is considered a prime farmland soil.*

Utilize the following table format to list all soils found within the easement area:

Soil Type	Name	Acreage	% of Total	Prime, Unique, or Statewide Importance? Y/N
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Map 5: USDA-NRCS soils map (available through USDA Web Soil Survey) with appropriate labels.

Map 6: U.S. Geological Survey (USGS) U.S. Topo or 7.5-minute quadrangle topo map with clear contour lines.

Section 6: Descriptions of the Property's Natural Features:

In this section, highlight all the property features at the time of the easement, including but not limited to:

- Man-made features: Existing man-made improvements or incursions, such as roads, buildings, fences, man-made ponds, canals, or gravel pits. This section will highlight all impermeable features.
- Vegetation, habitat, and animal presence: Identification of flora and fauna, such as rare species locations, natural habitats, animal breeding and roosting areas, and migration routes.
- Land use history: Present uses and recent past disturbances.
- Special use areas: Land management areas such as logging roads, landing decks, general forest management zones, protected riparian zones, trails, etc.
- Forest description (if applicable): General description of forest types within the easement area (e.g., hardwood, pine, ornamental, etc.).
 - *Map 7: Accompanying stand map or reference map with labeled stands (if applicable).*
- Aquatic features: List and describe all significant aquatic features (streams, water bodies, wetlands, floodplains, major waterways, etc.). Provide a brief narrative regarding how the easement positively impacts those features.
 - *Map 8: Accompanying labeled aquatic map (overlay of an aerial/satellite view, if possible).*
 - *Map 9: General hydrology map.*
- Wildlife and natural communities (*Optional*): List and describe all wildlife habitats and natural communities of significance found within the easement area (e.g., common wildlife, rare and endangered species, etc.).
 - *Map 10: Accompanying map of wildlife and natural communities.*
- Additional distinct natural features: Please include any specialty areas of interest, such as large trees and ephemeral streams.



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Section 7: Archeological and Historical Features:

- List and description of all historical features of significance, including cemeteries (if applicable).
 - *Map 11: Labeled map of archeological and historical features on the property (if applicable).*

Section 8: Photographic Documentation:

This section is one of the most important. A photographic record of the entire property is essential, as is an adequate representation of the site at the time of recording. All photos must be easily replicable from roads, permanent features, or GPS waypoints. Photographs are recommended to include timestamps, latitude and longitude, or GPS coordinates.

Please be diligent in representing the following:

- Photographs must be taken at regular intervals along the property line that capture the property in its entirety, including photos from each corner of the property.
- Photographs of each permanent structure within each building envelope or farmstead area.
- If not included above, all other impervious surfaces in the easement.
- Photographs of any other human modifications to the property (including roads, ditches, dams, etc.).
- General landscape pictures that are representative of the easement area.
- Photographic index with descriptions of each photo (photos must have descriptions next to them).

Map 12: Photographic documentation map with photos numbered. Include a compass direction to note the direction the photo was taken or a GPS coordinate.

Section 9: Addenda

- NCDA&CS Approved Survey
- Signed Easement Restriction Acknowledgement Form
- Environmental Site Assessment
- Forest Management Plan and/or Conservation Plan if applicable
- Preparer Information: Identity and qualifications of preparer(s) that demonstrate their experience, education, and expertise relevant to the resources, features, and characteristics being documented, the Conservation Values and purposes of the Conservation Easement, and the tasks necessary to prepare the Baseline Report.

Section 10: Signature Page (Acknowledgement of Property Condition Form):



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Signatures of acknowledgment that the landowner(s) agree with the BDR and the property's condition when the easement is recorded on the property.

The preliminary Baseline Documentation Report, with any applicable updates, must be approved at least 30 business days prior to closing. **NO EDITS ARE PERMITTED AFTER APPROVAL.** In the event of a delay in closing, the entity must provide a signed certification letter stating that there have been no changes to the easement area after sixty days. The BDR is to be reviewed by the entity and landowner, signed, and returned. The BDR must be signed by all authorized signatories of the landowner and the entity, and it must be notarized.

Note: Entities may use their own BDR acknowledgment page, including a notary individualization, but all forms must be complete.

- **Date(s) of field work, report compilation, and any follow-up visits**
- **Summary of data collection methods, including the accuracy of GPS equipment**
- **Preparer's qualifications**

Acknowledgements Examples

Baseline Documentation Team:

Sam Smart, Land Stewardship and Acquisition Specialist
Samantha Solid, Land Stewardship Specialist
Zoe Ground, Ph.D, Soil Scientist

Location of the Original Document

The original signed document is stored in a fireproof cabinet located within the Carolina Open Space Trust office. This original document was placed in this location on _____, 2027 by _____.

I. Declarations of Accuracy

This baseline report (consisting of xx pages of text including the table of contents, 4 appendices, 5 maps and 14 pages of photographs) is prepared to document the current status of the Great Ranch Conservation Property to be held by the Carolina Open Space Trust, a North Carolina 501(c)(3), nonprofit organization.

We declare that, in the preparation of this baseline report, we acted under and fulfilled our duty to gather and record the information contained herein accurately and in the regular course of the business of the Carolina Open Space Trust. Further, we declare that the information contained herein accurately reflects our personal knowledge gained by our field observations on December



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2 through 4, 2026. We 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 Great Ranch Conservation Property.

We declare under penalty of perjury under the laws of the State of North Carolina that the foregoing is true and correct and that this declaration was executed on December __, 2026.

Signatures X _____

II. Declaration of Reliance and Certification of Record

Acting as the President of the Carolina Open Space Trust and as its Custodian of Records, I declare that the Carolina Open Space Trust adopts, has relied upon, and will rely upon the information contained in this report to describe the condition of the Conservation 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 reports. This document was created 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 North Carolina that the foregoing is true and correct and that this declaration was executed on December __, 2026.

Helen Speaker X _____
President, Carolina Open Space Trust

III. Declaration of Acceptance

I, George F. Donor, as Trustee of the George Y. Donor Trust, am the current owner of the Great Ranch Conservation Property subject to the conservation easement dated December __, 2026, to be conveyed to the Carolina Open Space Trust and recorded in the official records of _____ County. I have read and independently reviewed this baseline report and declare that this report accurately describes the status of the physical features and uses of the conservation easement area.

I declare under penalty of perjury under the laws of the State of North Carolina that the foregoing is true and correct and that this declaration was executed on December __, 2026.

George F. Donor, X _____
Trustee of the George Y. Donor Trust