



**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 any subcontractor meets the requirements described below as well as supplying the subcontractor 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) are important in establishing 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. BDRs also help document how the characteristics of the land support the purposes of the conservation easement and help to 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 all BDRs.

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 a qualified employee of the land trust or Soil and Water Conservation District. The credentials of the individual 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 as well as review the report *prior to* 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 all due diligence items found within the baseline documentation report are versions approved previously 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 form regarding the easement restrictions and monitoring actions.



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***By signing this “Baseline Documentation Report Requirements and Checklist for Easement Programs”, I am certifying that I meet the requirements set forth herein, which ensure that the State funds received for the purchase of the subject easement are handled in a manner that protects the interest of the State of North Carolina.***

\_\_\_\_\_  
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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**Baseline Documentation Report Checklist**

**Title Page:**

	<p>Title Page Must Include:</p> <ul style="list-style-type: none"> <li>• Title of the easement as stated in the ADFP Trust Fund contract</li> <li>• ADFP Trust Fund tracking number</li> <li>• NCDA&amp;CS contract number</li> <li>• Date of the completion and date of conveyance</li> <li>• Name, title, and affiliation of the BDR author(s)</li> </ul>
	Table of Contents with Page Numbers: Section Headers, Maps, and Photos/Addenda
	Purpose of the Conservation Easement: Conservation Easement Values as stated under IRC Section 170(h)
	Landowner Contact Information: Names, addresses, email, phone numbers, etc.

**Section 1: Purpose and Easement Holder**

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

**Section 2: Property Background**

	Total parcel acreage and easement acreage (if different)
	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 – General description of the adjacent land
	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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	Discussion of environmental conditions. Identify any areas for potential monitoring or summary of Phase or Phase II Environmental Site Assessment findings and subsequent remediation actions. (The full EA will be included in the addenda).
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**Section 3: Existing Land Use and Management**

	The landowner's objectives for the management of the parcel and current agricultural practices
	Statement on the general condition and management of pasture and cropland. Include acreage and percent of land use in the easement (if applicable)
	Include a copy of the current USDA-NRCS or local Soil and Water Conservation District conservation plan (if applicable under HEL status) <ul style="list-style-type: none"> <li>• If managed for HEL, it must 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)</li> </ul>
	Statement on Potentially Highly Erodible Land (PHEL) soils. Description of soils, slope, etc., if applicable
	Statement on the general condition and management of forest and woodlands
	Statement on the general condition and management of other significant land uses
	<i>Map: Aerial or satellite imagery of the property with the easement boundary map overlay. Include callouts of significant features, including farmsteads and building envelopes, and legal access (ingress/egress) from a publicly maintained road</i>

**Section 4: Documentation of existing conditions as it relates to the easement restrictions and reserved rights.**

	List and describe the purpose of the conservation easement in terms of Rights Restricted
	List and describe the purpose of the conservation easement in terms of Rights Retained
	List and description of all existing human modifications, including all roads.
	List of each existing and allowable permanent structures and other impervious surfaces
	Table of impervious surface dimensions and approximate impervious surface for each
	Calculation of the total extent of impervious structures
	Calculation of the maximum allowable impervious surface area within the easement
	Calculation of the remaining allowable surface area within the easement converted to square feet and acres
	List of Farmstead 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,</i>



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	<i>cemeteries, trash piles/dumps, etc., within the easement area and farmstead building envelopes identified.</i>
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**Section 5: Land Parcel Topography and Soil Types**

	A short paragraph summarizing the general topography of the easement area, highlighting any extreme
	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: Highly Erodible Soils (overlay of an aerial/satellite view, if possible) of the property with any farmstead building envelopes</i>
	<i>Map: Contour 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>

**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>
	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>

**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



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	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
	Map: Documentation map with photos numbered. Include a compass direction to note the direction the photo was taken

**Section 9: Additional Maps and Addenda**

	<i>Map: USGS US Topo or 7.5-minute quadrangle topo map</i>
	<i>Map: General hydrology map</i>
	NCDA&CS Approved Survey
	Easement Deed with Easement Restriction and Monitoring Guideline
	Abbreviated bio with qualifications of the author

**Section 10: Signature Page**

	Signature of authorized signatory of Grantee organization
	Signature(s) of all landowners listed in the easement
	Signed easement restriction acknowledgment form



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## **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 and 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 names, email, and phone numbers of any land managers, lessees, gatekeepers, etc. as appropriate. Email addresses are extremely important.
  - **Please make sure to highlight who the main contact is as well as 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. Specifically, regarding the former, the "conservation purposes" that **must be referenced** and are stated under Internal Revenue Code Section 170(h) are:
  - a. the preservation of land areas for outdoor recreation by, or the education of, the public,
  - b. the protection of a relatively natural habitat of fish, wildlife, or plants, or similar ecosystem,
  - c. the preservation of open space (including farmland and forest land) where such preservation is --
    - i. for the scenic enjoyment of the general public, or
    - ii. pursuant to a clearly delineated Federal State, or local governmental conservation policy, and will yield a significant public benefit,
  - d. the preservation of an historically important land area or a certified historic structure.
  - An example would be: 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 and other natural resources and scenic values of the protected property for present and future generations.





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- Identification, qualifications, and parcel selection methods of the easement holder: Briefly describe the easement holder entity, highlighting the qualifications of the entity to hold easements. Additionally, 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.
  - This is extremely valuable in helping subsequent generations understand the easement.
- A well-prepared baseline will provide a context for the easement by including a section describing how the property fits within a larger conservation objective, how it was funded using public and/or private dollars, and how the project may have been referred from another conservation organization or governmental entity.
- If tenants are on the property or it is leased for grazing or timber harvesting, 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, etc.
- Total parcel acreage and easement acreage (if different). This must match the NCDA&CS-approved survey and be consistent throughout the document. Please do not include +/- as the acreage has been certified by the surveyor.
- General location in the county.
- Inclusion 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 general land use.
- Location and Physical Setting – 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) in terms of recognized environmental concerns or any items that were addressed prior to recordation or lingering concerns for monitoring.



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- Trash, debris, or environmental conditions otherwise indicated in the easement deed as prohibited must be documented and discussed.
- In the event a Phase II is required, this will also be included, as well as a narrative of findings and remediation activities. Areas and actions for future monitoring must also be discussed.
- The Environmental Audit or the Environmental Site Assessment (Phase I) will be attached in the addenda in its entirety.

Map 1: *Include imagery of 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).*

**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?
- Current land uses including 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).
  - 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 let 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.
  - 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).



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- If the NRCS conservation plan identifies the parcel or fields within as HEL, then the conservation plan map provided by NRCS must also be attached and HEL status to the field level discussed.
- Include a discussion of soil units if considered potentially highly erodible based on soil type, slope, etc.

*Map 2: Aerial or satellite imagery of the property with the easement boundary map overlay. Include callouts of significant features, including farmsteads building envelopes, existing structures and = 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 documents how many homes exist on the land as of the date of the easement), as well as other pre-existing conditions or features that may threaten the property's conservation values. This may include access easements, etc., for areas excluded from the easement or adjoining landowners.

**Impervious Surfaces and Existing Human Modifications:**

- List each permanent structure and other impervious surfaces, showing length/width measurement. 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 Farmstead Building Envelopes with acreage for each of the approved uses:
  - Current Residential;
  - Future Residential;
  - Farm Support Housing;



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- Other Residential;
- 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:
  - Farmstead 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 consists of several farm-related structures.
    - The creamery building is a wood sided structure that has been restored from the original 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 approximate impervious surface for each of these areas are listed in Table 1:

<b>Impervious Surface Area</b>	<b>Photo point</b>	<b>Dimensions</b>	<b>Impervious Surface (sq. ft.)</b>	<b>Impervious Surface (acres)</b>
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
<b>Total Impervious Surface</b>			<b>22,636 sq. ft</b>	<b>0.519 acres</b>

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.



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

*Map 3: 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. Farmstead 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 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 moderately eroded soil found on uplands with elevations ranging from 300-750 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 4: Contour map (overlay of an aerial/satellite view, if possible) of the property or the best available map showing the property’s elevation profile.*

*Map 5: Accompanying USDA-NRCS soils map (available through USDA Web Soil Survey) with appropriate labels.*



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## **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:

- **Manmade features:** Existing manmade improvements or incursions, such as roads, buildings, fences, manmade ponds, canals, or gravel pits. This section will highlight all permeable features.
- **Vegetation, habitat, and animal presence:** Identification of flora and fauna, such as rare species locations, natural habitat, 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 6: Accompanying stand map or reference map with labeled stands (if applicable).*
- **Aquatic features:** List and a description of 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 7: Accompanying labeled aquatic map (overlay of an aerial/satellite view, if possible).*
- **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 8: Accompanying map of wildlife and natural communities.*
- **Additional distinct natural features:** Please include any specialty areas of interest, such as large trees, ephemeral streams, etc.

## **Section 7: Archeological and Historical Features:**

- List and description of all historical features of significance, including cemeteries (if applicable).
  - *Map 9: Labeled map of archeological and historical features on the property (if applicable).*

## **Section 8: Photographic Documentation:**

This section is one of the most important. There must be a photographic record of the entire property. An adequate representation of the site at the time of recording is essential. 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.



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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 property corner.
- 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 10: Photographic documentation map with photos numbered. Include a compass direction to note the direction the photo was taken or a GPS coordinate.*

### **Section 9: Additional Maps and Addenda**

- NCDA&CS Approved Survey
- Recorded Easement Deed
- Signed Easement Restriction Acknowledgement Form
- Easement Restrictions and Monitoring Guideline
- Environmental Site Assessment
- Forest Management Plan and/or Conservation Plan if applicable
- Preparer Information: Identity and qualifications of preparer(s) that demonstrates 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

*Map 11: U.S. Geological Survey (USGS) U.S. Topo or 7.5-minute quadrangle topo map.*

*Map 12: General hydrology map.*

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

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

A final review, with any applicable updates, of the BDR must be approved 30 business days before closing. The BDR is to be reviewed by the entity and landowner, signed, and returned with the closing check request. **NO EDITS ARE PERMITTED AFTER APPROVAL.** The BDR must be signed by all authorized signatories of the landowner and the entity and notarized.

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



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**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 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





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



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,  
Trustee of the George Y. Donor Trust