#### ACEA Standard Rural Preservation Deed (RPD) Template October 19, 2019

This sample deed is provided to assist landowners and their attorneys in preparing deeds of easement to be conveyed to Albemarle Conservation Easement Authority (ACEA). As each property contains unique conservation values, staff may recommend provisions appropriate to individual properties. Landowners should discuss present and future land management practices with staff before preparation of the deed of easement. ACEA does not provide legal or tax advice or warrant that this sample will meet all IRS or Virginia Department of Taxation requirements or the Virginia Land Conservation Foundation's Conservation Value Review Criteria for easements valued at \$2.5 million dollars or more. An easement will permanently change how the property may be used and its market value. Because this change can have major estate planning and tax consequences, landowners should consult legal counsel prior to submission of their proposed easement to the ACEA for its consideration. Selection of alternative provisions should be made and guidance instructions in italics and brackets should be deleted.

NOTE TO TITLE EXAMINERS: This open-space easement contains restrictions on permitted uses and activities on the property described below, which run with the land and are applicable to the property in perpetuity.

| Prepared by: [landowner's attorney]  |
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| Return to: Albemarle Conservation Easement Authority 401 McIntire Road Charlottesville, Virginia 22902   |
| PARCEL ID NO.:   |
| Exempt from recordation tax under the Code of Virginia (1950), as amended, Sections 58.1-811 (A) (3) and/or 58.1-811 (C)(4) and from Circuit Court Clerk's fee under Section 17.1-266  |
| THIS DEED OF GIFT OF EASEMENT (this "Easement"), made this day of, 20, [between or among], [Underline or capitalize surname of individual(s).] [Include marital status of Grantor.] [collectively or together "Grantor"]; the COUNTY OF ALBEMARLE, a political subdivision of the Commonwealth of Virginia; the ALBEMARLE CONSERVATION EASEMENT AUTHORITY, a public recreational facilities authority and political subdivision of the Commonwealth of Virginia, (collectively "Grantees") (the designations "Grantor" and "Grantees" refer to Grantor and Grantees and their respective successors and assigns); [if lien] ("Lender") to be indexed as Grantor; and, ("Trustee(s)"), to be indexed as |
| Grantor, witnesseth:   |

#### **RECITALS:**

- **R-1** Grantor is the owner in fee simple of real property situated in Albemarle County, Virginia, containing in the aggregate \_\_\_\_\_ acres as further described below (the "Property"), and desires to give, grant, and convey to Grantees a perpetual open-space easement over the Property as herein set forth.
- **R-2.** The Property is being developed as a rural preservation development under Albemarle County Code § 18-10.3.3.
- **R-3.** A rural preservation development is an optional form of subdivision that is intended to encourage more effective land use in terms of the goals and objectives of the Rural Areas section of the Albemarle County Comprehensive Plan than can be achieved under conventional development.
- **R-4.** The Property is the rural preservation tract, which is restricted by this deed to ensure that it is maintained and preserved to preserve agricultural and forestal lands and activities, to provide water supply protection, and to conserve natural, scenic or historic resources.
- **R-5** Grantees are political subdivisions of the Commonwealth of Virginia and "qualified organizations" and "eligible donees" under Section 170(h)(3) of the Internal Revenue Code (references to the Internal Revenue Code in this Easement shall be to the United States Internal Revenue Code of 1986, as amended, and the applicable regulations and rulings issued thereunder, or the corresponding provisions of any subsequent federal tax laws and regulations) (the "IRC") and Treasury Regulation Section 1.170A-14(c)(1) and are willing to accept a perpetual open-space easement over the Property as herein set forth.
- **R-6** Chapter 461 of the Virginia Acts of 1966 provides in part "that the provision and preservation of permanent open-space land are necessary to help curb urban sprawl, to prevent the spread of urban blight and deterioration, to encourage and assist more economic and desirable urban development, to help provide or preserve necessary park, recreational, historic, and scenic areas, and to conserve land and other natural resources" and authorizes the acquisition of interests in real property, including easements in gross, as a means of preserving open-space land. The balance of the Chapter is codified in Chapter 17, Title 10.1, Sections 10.1-1700 through 10.1-1705 of the Code of Virginia, as amended (the "Open-Space Land Act").
- **R-7** Pursuant to the Open-Space Land Act, the purposes of this Easement (as defined below in Section I) include retaining and protecting open-space and natural resource values of the Property, and the limitations on division, residential construction, and commercial and industrial uses contained in Section II ensure that the Property will remain perpetually available for agricultural, forestal, or open-space use, all as more particularly set forth below.
- **R-8** Chapter 56, Title 15.2 of the Code of Virginia authorizes the creation of public recreational facilities authorities, such as the Grantee Authority, and further authorizes those authorities to acquire lands or rights in land.
- **R-9** As required under Section 10.1-1701 of the Open-Space Land Act, the use of the Property for open-space land conforms to the County of Albemarle Comprehensive Plan adopted on June

- 10, 2015, and the Property is located within an area that is designated as Rural Areas on the county's future land use map.
- **R-10** This open-space easement in gross constitutes a restriction granted in perpetuity on the use that may be made of the Property and is in furtherance of and pursuant to the clearly delineated governmental conservation policies set forth below: [Cite state, local, or federal governmental policies that will be advanced by the preservation of the Property, and the public benefit of such preservation.]

#### (i) Land conservation policies of the Commonwealth of Virginia as set forth in:

- a. Section 1 of Article XI of the Constitution of Virginia, which states that it is the Commonwealth's policy to protect its atmosphere, lands, and waters from pollution, impairment, or destruction, for the benefit, enjoyment, and general welfare of the people of the Commonwealth;
  - b. The Open-Space Land Act cited above;
- c. The Virginia Land Conservation Incentives Act, Chapter 3 of Title 58.1, Sections 58.1-510 through 58.1-513 of the Code of Virginia cited above, which supplements existing land conservation programs to further encourage the preservation and sustainability of the Commonwealth's unique natural resources, wildlife habitats, open spaces, and forested resources;
  - d, e, f., g., h., i, etc. (any other applicable state policies); and

#### (ii) Land use policies of the County of Albemarle as delineated in:

- a. its comprehensive plan adopted on June 15, 2015, to which plan the restrictions set forth in this Easement conform and which contains the following:
- i. the Rural Area Chapter of the Albemarle County Comprehensive Plan includes the following goals and objectives:
- GOAL: Albemarle's Rural Area will have thriving farms and forests, traditional crossroads communities, protected scenic areas, historic sites, and preserved natural resources.
- Objective 2: Protect and preserve natural resources, which include mountains, hills, valleys, rivers, streams, groundwater, and retain continuous and unfragmented land for agriculture, forestry, biodiversity, and natural resource protection.
- Strategy 2d: Continue to promote conservation easements to provide a financially attractive way for landowners to protect family farms in Albemarle County and their unique open space resources, to provide an opportunity for landowners to voluntarily sell a conservation easement to a public agency to be held in trust for perpetuity, and to preserve important features of the Rural Area for all.
- ii. the Natural Resources Chapter of the Albemarle County Comprehensive Plan includes the following goals and objectives:
- GOAL: Albemarle's ecosystems and natural resources will be thoughtfully protected and managed in both the Rural and Development Areas to safeguard the quality of life of present and future generations.

- Objective 1: Ensure clean and abundant water resources for public health, business, healthy ecosystems, and personal enjoyment by preventing shortages and contamination.
- Objective 4: Protect the biological diversity and ecological integrity of the County in both the Rural Area and Development Areas.
  - Strategy 5b: Continue to protect critical slopes in the Rural Area.
- b. Albemarle County's Rural Preservation Development regulations (Albemarle County Code § 18-10.3.3);
- c. [Applicable if the Property has been given land use value designation. Article VIII, Chapter 15 of the Albemarle County Code, which provides for use value assessment of real estate devoted to agricultural, forestal, horticultural, or open-space uses, the Property having been approved for use value assessment by the county];
- d. [Applicable if Property is in an agricultural, forestal or agricultural and forestal district. Chapter 3 of the Albemarle County Code, which provides certain protections for agricultural and forestal use of land to landowners who voluntarily limit development of their property under the terms of the applicable district, which ordinance was enacted pursuant to the Virginia Agricultural and Forestal Districts Act. The Property is located within the \_\_\_\_\_\_\_ Agricultural and Forestal District, and, as such, has been identified by Albemarle County as worthy of protection for conservation purposes];
- e. [*If available, add this*: Correspondence dated \_\_\_\_\_ from Albemarle County acknowledging that contribution of this Easement to Grantees and the restrictions set forth herein conform to the land use plan and policies of the county;]
- f. Grantees' formal practices in reviewing and accepting this Easement. Grantees have engaged in a rigorous review, considered and evaluated the benefits provided by this Easement to the general public as set forth in these recitals, and have concluded that the protection afforded the open-space character of the Property by this Easement will yield a significant public benefit and further the open-space conservation objectives of Grantees and the Commonwealth of Virginia. Treasury Regulation Section 1.170A-14(d)(4)(iii)(B) states that such review and acceptance of a conservation easement by a governmental entity tends to establish a clearly delineated governmental conservation policy as required under IRC Section 170(h)(4)(A)(iii);

f., g., etc. [any other applicable local policies].

[*Add this if applicable*:

| R      | [Cite here any other studies or plans that will be supported by the Property's preservation |
|--------|---|
| conser | vation awards, or other recognition that the Property has received.]                        |

(iii) Land conservation policies of the United States as set forth in: \_\_\_\_\_\_.

**R-**\_\_\_ [List in recitals hereinbelow the particular conservation attributes of the Property, the public benefit they yield, and how the restrictions set forth below protect such attributes.]

| <b>R-</b> This Easement will yield significant public benefit to the citizens of the Commonwealth as set forth in these recitals and in Section I below.   |
|--|
| <b>R</b> Grantor and Grantees desire to protect in perpetuity the conservation values of the Property as specified in Section I by restricting the use of the Property as set forth in Section II.   |
| <b>R-</b> Grantees have determined that the restrictions set forth in Section II (the Restrictions) will preserve and protect in perpetuity the conservation values of the Property and will limit use of the Property to those uses consistent with, and not adversely affecting, the conservation values of the Property and the governmental conservation policies furthered by this Easement.  |
| <b>R-</b> Grantees, by acceptance of this Easement, designate the Property as property to be retained and used in perpetuity for the preservation and provision of open-space land pursuant to the Open-Space Land Act.  |
| NOW, THEREFORE, in consideration of the foregoing recitals, incorporated herein and made a part hereof, and in consideration of the mutual covenants herein and their acceptance by Grantees, Grantor does hereby give, grant, and convey to Grantees for the public purposes set forth in Section I below an open-space easement in gross (this "Easement") over, and the right in perpetuity to restrict the use of, the Property, which is described below [or in SCHEDULE A attached hereto and made a part hereof] [ACEA prefers that the legal description be set forth below that than in a SCHEDULE A.] and consists of acres located in Albemarke County, Virginia, near, fronting on State Route [or road name], to-wit: [attorney to insert legal description keyed to each tax parcel]                         |
|  |
| The Property is shown as Parcel ID No among the land records of the County of Albemarle, Virginia. [Use if one tax parcel: Even if the Property may have been acquired previously as separate parcels, it shall be considered one parcel for purposes of this Easement, and the restrictions and covenants of this Easement shall apply to the Property as a whole. Use if more than one tax parcel: Even though the Property consists of parcels for real estate tax purposes and it may have been acquired previously as separate parcels, it shall be considered one parcel for purposes of this Easement, and the restrictions and covenants of this Easement shall apply to the Property as a whole.] [If the Property is a portion of or contains a portion of a tax parcel, revise the language above accordingly.] |

## **SECTION I -PURPOSES**

The conservation purpose of this Easement is to preserve and protect the conservation values of the Property in perpetuity by imposing the restrictions on the use of the Property set forth in Section II and providing for their enforcement in Section III. The conservation values of the Property are described in the above recitals, are documented in the Baseline Documentation Report described in Section IV below, and include the Property's open-space, [and if applicable: scenic, natural, historic, scientific, or recreational] values [Add if applicable: and its value as land preserved for rural uses such as forestry and agriculture (including livestock production)]. [In Section II add specific restrictions needed to provide protection for such values.]

[Optional: Pursuant to the Virginia Land Conservation Foundation's Conservation Value Review Criteria, the further conservation purpose of this Easement is [*Insert one or more from VLCF criteria as applicable*: preservation of land for agricultural use, forestal use, natural habitat and biological diversity, and/or natural resource-based outdoor recreation or education, historic preservation, watershed preservation, preservation of scenic open space, and/or preservation of open space designated by local government.]]

Grantor covenants that no acts or uses are currently being conducted or will be conducted at any time on the Property if such acts or uses are: (i) inconsistent with the conservation purposes of the donation or (ii) consistent with the conservation purposes of the donation, but are destructive of other significant conservation interests unless such acts or uses are necessary for the protection of the conservation interests that are the subject of the donation.

#### **SECTION II – RESTRICTIONS**

Restrictions are hereby imposed on the use of the Property pursuant to the public policies set forth above. The acts that Grantor covenants to do and not to do upon the Property and the restrictions that each Grantee is hereby entitled to enforce are and shall be as follows:

#### 1. DIVISION.

(i) Separate conveyance of a portion of the Property or division of the Property is prohibited. [Alternate language where division rights are retained: The Property shall not be divided. For purpose of this Easement, division of the Property includes, but is not limited to, recordation of a subdivision plat, judicial partitioning of the Property, testamentary partitioning of the Property, or pledging for debt of a portion of the Property.

The exterior boundary lines of the Property may not be adjusted unless both (a) the abutting parcel sharing the same boundary line is subject to a substantially equivalent conservation or open-space easement and (b) the adjustment is approved in writing by each Grantee. Internal boundary line adjustments within the Property may be approved only if the adjustment is consistent with this Easement. The Grantor bears sole responsibility, and the Grantees disclaim any and all liability, for the tax consequences of any such adjustments.

(ii) The acquisition of a *de minimis* portion of the Property adjacent to State Route(s) for minor road improvements shall not be considered a division of the Property, and neither the acquisition of such a de minimis portion of the Property nor the use of the portion of the Property so acquired shall be prohibited by this Easement, provided that each Grantee approves such conveyance or taking, which approval shall be contingent upon the project including all reasonable actions, such as making landscaping or topographic improvements, to minimize the project's impact on the Property and prevent harm to its conservation values. Grantor reserves its separate right to approve such acquisition. Use of the Property for such a project is limited to minor improvements to Route(s) in its/their present alignment(s), including, but not limited to, maintenance, correction, repair, or upgrading of the existing public road(s). Such improvements could include, but are not limited to, the addition or renovation of ditches, box culverts, drainage swales, side slopes, curbing, re-grading, or enhancements, such as pull-offs, bike lanes, and restoration projects. For the purpose of this paragraph, "minor road improvements" does not include the addition of new travel lanes, except bike lanes. Any portion of the Property acquired from Grantor pursuant to this paragraph shall remain subject to the terms and restrictions of this Easement. [This paragraph is not applicable if the Property has no road frontage.]

#### 2. BUILDINGS, STRUCTURES, ROADS, AND UTILITIES.

- (i) **Buildings, structures, roads, and utilities.** No buildings, structures, roads, or utilities, other than the following, are permitted on the Property [*If there is a subparagraph (iv) below involving siting of buildings and structures, add this*:, provided, however, that certain permitted buildings and structures are subject to the siting restrictions set forth in Section II Paragraph 2(iv) below]:
  - (a) **Dwelling unit and non-residential outbuildings and structures**. One dwelling unit ["dwelling"], such as a detached or attached dwelling, barn or garage apartment, or cabin.
    - (1) Such dwelling shall not exceed the following maximum square feet of above-ground enclosed living area without each Grantee's prior review and written approval, which approval shall take into consideration the impact of the size, height, and siting of the proposed dwelling on the conservation values of the Property.

| Property Size                        | Maximum Square Footage |
|--------------------------------------|------------------------|
| Less than 50 acres                   | 4,500 square feet      |
| At least 50, but less than 60, acres | 5,500 square feet      |
| At least 60, but less than 70, acres | 6,500 square feet      |
| At least 70, but less than 80, acres | 7,500 square feet      |
| At least 80 acres                    | 8,000 square feet      |

(2) [*If applicable*: The dwelling currently existing on the Property shall be counted as the permitted dwelling.]

- (3) Grantor shall give each Grantee 30 days' written notice before beginning construction or enlargement of a/the dwelling on the Property.
- (4) Non-residential outbuildings and structures are permitted only if they are (i) commonly and appropriately incidental to permitted dwelling, (ii) sized appropriately to serve as amenities to residential use, and (iii) neither designed, equipped nor furnished for sleeping or cooking (such as swimming pools, decking detached from the single-family dwelling units, gazebos, garages, and tool sheds);
- (b) Farm buildings and structures. Farm buildings and structures, except that a farm building or farm structure exceeding \_\_\_\_\_\_\_ square feet in ground area [The following square footage may be appropriate for farm buildings and structures on the Property: 2,500 square feet for properties under 50 acres, 4,500 square feet for properties of 50 acres or more, and up to 10,000 square feet for large working farms in excess of 200 acres. Notwithstanding the above, ACEA staff will work with Grantor to determine the appropriate size for farm buildings and structures on the Property depending upon the conservation values being protected on the Property.] may not be constructed on the Property unless prior written approval for the building or structure shall have been obtained from each Grantee. Approval shall be limited to consideration of the impact of the size, height, and siting of the proposed building or structure on the conservation values of the Property. For purpose of this paragraph (b), a farm building or structure shall mean a building or structure originally constructed and used for the activities specified in Section II, Paragraph 3(i)(a) below;
- (c) Buildings for the processing and sale of farm or forest products or for certain animal-related uses. Buildings not exceeding four thousand five hundred (4,500) square feet of enclosed area in the aggregate and not individually exceeding two thousand five hundred (2,500) square feet of enclosed area for the processing and sale of farm or forest products produced or partially produced on the Property or, with each Grantee's prior written approval, buildings for boarding kennels, wildlife rehabilitation centers, veterinary clinics, or similar enterprises. For purpose of this paragraph (c), a building for the processing and sale of farm or forest products or for animal-related uses shall mean a building originally constructed and used for the activities specified in Section II, Paragraph 3(i)(b) below. Approval of buildings for animal-related uses shall be contingent upon each Grantee's determination that the construction of such buildings is consistent with the conservation purposes of this Easement and protective of the conservation values identified herein and that the buildings are located at sites on the Property not adversely impacting such conservation values. [If applicable: In the event of division of the Property as provided in Section II, Paragraph 1, the grantor making the division retains all permitted rights to buildings for the processing and sale of farm or forest products or for certain animal-related uses unless the right to

construct such building or buildings is allocated [between *or* among] the parcels in the instrument creating the division or another recorded instrument];

#### (d) Roads, driveways, and trails.

- (1) Private roads and driveways to serve permitted buildings and structures and roads with permeable surfaces for permitted uses and activities, such as farming or forestry.
- (2) Private roads or driveways and access easements over same to serve adjacent properties, provided that any such roads or driveways serving more than one adjacent dwelling have the prior written approval of each Grantee, which approval shall take into consideration the impact of the roads or driveways on the conservation values of the Property.
- (3) [If applicable: Public roads required to be constructed and dedicated in conjunction with (the) permitted division(s) of the Property, provided that each Grantee determines that the construction, maintenance, and dedication of such public roads will not impair the conservation values of the Property and gives prior written approval of such construction. Any such dedication shall not be considered a separate conveyance of a portion of the Property or an additional division of the Property, and this Easement shall remain in effect with respect to the portion of the Property so dedicated.
- (4) Trails, including, but not limited to, hiking, biking, and equestrian trails;

#### (e) Utilities and alternative energy structures.

- (1) Public or private utilities within existing rights-of-way therefor, consistent with any recorded instrument granting such rights-of-way.
- (2) Public or private utilities to serve permitted buildings, structures, or activities on the Property. In addition, public or private utilities (except for community wells and/or sewage treatment) to be constructed in whole or in part to serve other properties, provided each Grantee determines that the construction and maintenance of such utilities will cause no impairment of the conservation values of the Property and gives its prior written approval for such construction and maintenance. Approval of such construction and maintenance shall take into consideration the visibility and any other possible adverse impact of such utilities on the conservation values of the Property. Grantor reserves its separate right to approve any public or private utilities.
- (3) Alternative energy structures used to harness natural renewable energy sources, such as sunlight, wind, water, or biomass, provided that any such structure(s):

- (a) serve only permitted buildings, structures, or activities on the Property, which limitation shall not be deemed to prohibit the sale of excess power generated incidentally in the operation of such structures and associated equipment; and
  - (b) not be visible from any public road or historic viewshed.
- (f) Small-scale miscellaneous buildings and structures. Small-scale miscellaneous buildings and structures, the existence of which is consistent with the conservation purposes of this Easement and which will not impair the conservation values protected herein, such as hunting stands, wildlife observation structures, fences, and boardwalks [*If applicable*:, structures for crossing streams or wetlands or portions of docks or piers (all subject to the limitations set forth in Section II, Paragraph 5(ii) below)]; and
- (g) **Signs**. Signs (but not billboards or other signs larger than 32 square feet in area).
- (ii) **Construct, use and maintain**. Grantor shall have the right to construct and use any dwellings, other buildings, structures, roads, driveways, trails, and utilities permitted in Section II, Paragraph 2(i) above and to repair, maintain, renovate, expand, and replace any permitted dwellings, other buildings, structures, roads, driveways, trails, and utilities on the Property, within the limitations set forth in this Easement.
- (iii) Alternative use of square footage of dwellings. All or a portion of the allowable square footage for dwellings set forth in Section II, Paragraph 2(i)(a) above may be allocated to any number of buildings to be used for natural resource-based educational, scientific, or recreational purposes, provided that each Grantee determines that the conversion of dwellings or the construction of new buildings for such purposes is consistent with the conservation purposes of this Easement, determines that such conversion or construction will not impair the conservation values protected herein, and gives prior written approval of such conversion or construction. The approval of such construction shall take into consideration the impact of the size, height, and siting of the proposed building(s) on the conservation values of the Property.

[In order to comply with Treasury Regulation Section 1.170-14(e)(2) and the Virginia Land Conservation's Conservation Value Review Criteria it is strongly recommended that site control of dwellings and other buildings be included herein to prevent destruction of significant conservation interests such as scenic vistas, historic features, farmland, etc. with suggestions set forth for a subparagraph (iv) below.]

| (iv) <b>Siting of buildings and structures.</b> To protect [ | Select one or more or add whatever      |
|--|---|
| other features are being protected: the scenic values of     | of the Property, the agricultural soils |
| on the Property and/or the historic                          | on the Property], no buildings or       |
| structures larger than square feet in ground a               | area shall be constructed [Optional:    |
| within feet of State Route as measured from                  | n the center line of the road or above  |
| thefoot contour elevation or within the design               | gnated no-build area/restricted build   |
| area shown on the sketch attached hereto as Exhibit _        | ] [If there is a riparian protection    |
|  |   |

zone below, add this: (See Section II, Paragraph 5(i) for further restrictions on improvements in the riparian protection zone(s).)]

(v) Collective footprint limitation. For the purpose of this paragraph, the collective footprint is the ground area measured in square feet of the buildings and structures set forth in Section II, Paragraph 2(i)(a) through (c), (e), and (f) and Section II, Paragraph 2(iii) above and all other impervious surfaces, excluding linear surfaces, such as roads, driveways, walls, fences, and boardwalks The collective footprint shall not exceed \_\_1\_% of the total area of the Property [In general, between one-half of one (½ of 1%) percent and one (1%) percent is recommended. Properties will be evaluated on a case-by-case basis, and characteristics of the Property as well as size will be taken into consideration. For example, smaller properties or working farms may require larger collective footprints, while larger properties or steep wooded properties may require lesser ones.], provided that if Grantor can demonstrate that an increase in the collective footprint would result in increased protection of the conservation values of the Property, Grantees may approve such increase. [Addition when appropriate: In the event of division of the Property, the collective footprint of each created parcel shall not exceed \_\_\_\_1\_\_ (\_\_%) percent of the total area of such parcel unless otherwise allocated in the instrument of transfer or another recorded instrument or allocated de facto by conveyance of a parcel with existing structures.] [Proviso: Carefully calculate the permitted footprint for any parcel(s) with small acreage. For example, the one-half percent collective footprint for a ten-acre parcel is 2,178 square feet unless otherwise allocated in the instrument of transfer.]

#### 3. INDUSTRIAL AND COMMERCIAL ACTIVITIES ON THE PROPERTY.

- (i) Industrial or commercial activities on the Property are limited to the following:
  - (a) agriculture (including livestock production), equine activities, or forestry;
- (b) processing or sale of farm or forest products produced or partially produced on the Property and approved animal-related uses in buildings permitted in Section II, Paragraph 2(i)(c) above;
- (c) small-scale commercial operations, events, or industrial operations, provided that any such operations or events (i) are incidental to and compatible with the activities set forth in subsection (a) above and (ii) receive each Grantee's prior written approval as consistent with the conservation purposes of this Easement;
- (d) activities, other than those already permitted in (a) and (b) above, that can be, and in fact are, conducted within permitted buildings without material alteration to their external appearance, provided that such activities to be conducted in buildings exceeding 10,000 square feet in ground area are subject to the prior written approval of each Grantee, which approval shall take into consideration the impact of the activities and any proposed associated infrastructure improvements on the conservation values of the Property;

- (e) the sale of excess power generated in the operation of alternative energy structures and associated equipment to serve permitted buildings, structures, and activities on the Property as provided in Section II, Paragraph 2(i)(e)(3) above;
- (f) activities to restore or enhance wetlands or streams or restore, enhance, or develop other ecosystem functions on the Property including, but not limited to, stream bank restoration, wetland and stream mitigation, biological carbon sequestration, and biodiversity mitigation, provided that such activities are not in conflict or inconsistent with the conservation purposes of or the restrictions set forth in this Easement and that prior written approval for same shall have been obtained from each Grantee. Grantees are not responsible for monitoring any such activities and have no obligation to enforce the provisions of any permit(s), restriction(s), or easement(s) therefor. Subject to each Grantee's approval, Grantor is free to participate in same in Grantor's discretion and to retain any remuneration derived therefrom;
- (g) outdoor activities that do not permanently alter the physical appearance of the Property and that do not impair the conservation values of the Property herein protected; and
- (h) natural resource-based educational, scientific, or recreational activities, provided that they are consistent with the conservation purposes of this Easement and do not impair the conservation values protected herein.

# 4. MANAGEMENT OF FOREST. [NOTE: The following provisions are a standard base. Enhanced provisions may be indicated on properties with significant forestry conservation value.]

- (i) Best Management Practices (BMPs), as defined by the Virginia Department of Forestry, shall be used to control erosion and protect water quality when any material timber harvest (whether of healthy or diseased trees) or land-clearing activity is undertaken. A pre-harvest plan shall be submitted to each Grantee for approval no later than fourteen (14) days before the proposed date of a material timber harvest, which approval shall take into consideration whether the pre-harvest plan is consistent with the terms of this Easement. The pre-harvest plan shall describe the BMPs to be used in sufficient detail to ensure that water quality will be protected.
- (ii) The cutting, clearing, or removal of trees on less than ten (10) acres of the Property at any one time does not constitute material timber harvesting or land clearing, and does not require the use of BMPs or a pre-harvest plan, if:
  - (a) the cutting, clearing or removal trees is necessary for the construction or maintenance of permitted roads, driveways, trails, utilities, buildings, structures, food plots, or ponds;
  - (b) the trees are used for firewood for Grantor's domestic use;

- (c) the trees are invasive species;
- (d) the trees pose a threat to the health or safety of persons, property or livestock;
- (e) the trees are dead, diseased, or dying; or
- (f) the cutting, clearing, or removal of trees is necessary for other permitted activities on the Property, except timber harvesting or land clearing, provided that the clearing of land to preserve or reclaim fields is permitted.

[ACEA strongly recommends, and may require, that riparian protection zones be maintained for certain water-related features, as referenced below.]

#### 5. RIPARIAN BUFFER.

A 35- foot buffer strip shall be maintained along each edge of each perennial stream on the Property as measured from the tops of the banks.

- (i) Within the buffer strips there shall be:
  - (a) no buildings or other substantial structures constructed,
  - (b) no new paved roads or paving of existing roads without each Grantee's approval,
  - (c) no storage of compost, manure, fertilizers, chemicals, machinery or equipment,
  - (d) no removal of trees, except removal of invasive species, removal of dead, diseased or dying trees, removal of trees posing a threat to human or livestock health or safety or property, removal of trees for the purpose of maintaining existing roads or constructing new permitted roads, or minimal removal of individual trees, and
  - (e) no plowing, cultivation, filling, or other earth-disturbing activity, except as may be reasonably necessary for the activities set forth in Section II Paragraph 5(ii) below.
- (ii) Permitted within the buffer strips are:
  - (a) erosion control or restoration, enhancement, or development of ecosystem functions on the Property as permitted and limited under Section II, Paragraph 3(i)(f) above,
  - (b) fencing along or within the buffer strips,
  - (c) construction and maintenance of stream crossings (including improvements over the buffer strip(s) to access crossings) for pedestrians, livestock and vehicles, which crossings minimize obstruction of water flow,
  - (d) creation and maintenance of trails with unimproved surfaces,
  - (e) creation and maintenance of wildlife plots and natural heritage habitat,
  - (f) planting of trees, shrubs, grasses, or other vegetation, and
  - (g) clearing, grading and dam construction to create ponds (but not storm water retention or detention ponds to serve other properties).

(iii) If the perennial streams meander or change course naturally, or as a result of the restoration, enhancement, or development of ecosystem functions on the Property as permitted and limited under Section II, Paragraph 3(i)(f) above, the buffer strips shall remain the same width, but move relative to the movement of the perennial streams. In such event, any buildings or structures that were outside of the original buffer strips and are determined to be within the new buffer strips shall not be considered in violation of these restrictions and may be maintained at such locations.

#### 6. GRADING, BLASTING, FILLING AND MINING.

- (i) Grading, blasting, filling, or earth removal shall not materially alter the topography of the Property except (a) for clearing, grading, and dam construction to create and maintain ponds (but not storm water retention or detention ponds to serve other properties), (b) for restoration, enhancement, or development of ecosystem functions on the Property as permitted and limited under Section II, Paragraph 3(i)(f) above, (c) for erosion and sediment control pursuant to an erosion and sediment control plan, or (d) as required in the construction of permitted buildings, structures, roads, driveways, trails, and utilities. Grantees may require appropriate sediment and erosion control practices to be undertaken for buildings, structures, roads, driveways, trails, or utilities that require Grantees' approval in Section II, Paragraph 2(i) above, as a condition of such approval.
- (ii) Grading, blasting, filling, or earth removal in excess of one acre for the purposes set forth in subparagraphs (a) through (d) above require 30 days' prior notice to each Grantee. Generally accepted agricultural activities, including the conversion of forest land into farmland, shall not constitute a material alteration of the topography. [Select: Surface mining on the Property, subsurface mining from the surface of the Property, drilling for oil or gas or other minerals on the Property, and dredging on or from the Property are prohibited. or Surface mining on the Property, subsurface mining from the surface of the Property, and drilling for oil or gas or other minerals on the Property are prohibited. Dredging on or from the Property is prohibited, except for maintenance of any ponds on the Property.]

#### <u>SECTION III – ENFORCEMENT</u>

1. RIGHT OF INSPECTION. Representatives of either Grantee may enter the Property from time to time for purposes of inspection (including photographic documentation of the condition of the Property) and enforcement of the terms of this Easement after permission from or reasonable notice to Grantor or Grantor's representative, provided, however, that in the event of an emergency, entrance may be made to prevent, terminate or mitigate a potential violation of these restrictions with notice to Grantor or Grantor's representative being given at the earliest practicable time.

#### 2. ENFORCEMENT.

(i) Grantees, in accepting this Easement, commit to protecting the conservation purposes of the Easement and have the resources necessary to enforce the restrictions set forth

herein. Either Grantee has the right to bring a judicial proceeding to enforce the restrictions, which right specifically includes the right (a) to require restoration of the Property to its condition on the Effective Date or to require restoration of the Property to its condition prior to a violation hereof, provided that such prior condition was in compliance with the provisions of this Easement; (b) to recover any damages arising from non-compliance; (c) to compel Grantor to disgorge to Grantees any proceeds received in activities undertaken in violation of the restrictions set forth herein; (d) to require Grantor to replant or pay for the replanting of trees on the Property in the event that Grantor harvests timber in violation of any restrictions set forth in Section II above; (e) to enjoin non-compliance by temporary or permanent injunction; and (f) to pursue any other appropriate remedy in equity or law. If the court determines that Grantor failed to comply with this Easement, Grantor shall reimburse Grantees for any reasonable costs of enforcement, including costs of restoration, court costs, expert-witness costs, and attorney's fees, in addition to any other payments ordered by the court. Either Grantee's delay shall not waive or forfeit its right to take such action as may be necessary to ensure compliance with this Easement, and Grantor hereby waives any defense of waiver, estoppel, or laches with respect to any failure to act by either Grantee.

- (ii) Notwithstanding any other provision of this Easement, Grantor shall not be responsible or liable for any damage to the Property or change in the condition of the Property (a) caused by fire, flood, storm, Act of God, governmental act, or other cause outside of Grantor's control or (b) resulting from prudent action taken by Grantor to avoid, abate, prevent, or mitigate such damage to or changes in the condition of the Property from such causes.
- (iii) Nothing in this Easement shall create any right in the public or any third party to maintain any judicial proceeding against Grantor or either Grantee.

#### **SECTION IV – DOCUMENTATION**

Grantor has made available to Grantees, prior to conveyance of this Easement, documentation sufficient to establish the condition of the Property at the time of the conveyance, and documentation retained in the office of Grantee County, including, but not limited to, the Baseline Documentation Report (BDR), describes the condition and character of the Property at the time of the conveyance. The BDR may be used to determine compliance with and enforcement of the terms of this Easement. However, the parties are not precluded from using other relevant evidence or information to assist in that determination. The parties hereby acknowledge that the BDR contained in the files of Grantee County is an accurate representation of the Property and contains a statement signed by Grantor and a representative of Grantees as required by Treasury Regulation Section 1.170A-14(g)(5)(i).

#### <u>SECTION V – GENERAL PROVISIONS</u>

1. **DURATION.** This Easement shall be perpetual. It is an easement in gross that runs with the land as an incorporeal interest in the Property. The covenants, terms, conditions, and

restrictions contained in this Easement are binding upon, and inure to the benefit of, Grantor and its successors in title to the Property, or any portion thereof or interest therein, and Grantees and their successors or assigns, and shall continue as a servitude running in perpetuity with the Property. The rights and obligations of an owner of the Property under this Easement terminate upon proper transfer of such owner's interest in the Property, except that liability for acts or omissions occurring prior to transfer shall survive transfer.

- 2. NO PUBLIC ACCESS AND GRANTOR'S RETENTION OF USE. Although this Easement will benefit the public as described above, nothing herein shall be construed to convey to the public a right of access to, or use of the Property. Subject to the terms hereof, Grantor retains the exclusive right to such access and use including, but not limited to, the right to hunt, fish, or trap on the Property.
- 3. GRANTOR'S REPRESENTATIONS AND WARRANTIES. Grantor represents, covenants, and warrants that (i) Grantor has good fee simple title to the Property (including the mineral rights located under the surface of the Property), (ii) Grantor has all right and authority to give, grant and convey this Easement, (iii) the Property is free and clear of all encumbrances (other than restrictions, covenants, conditions, and utility and access easements of record), including, but not limited to, any leases, option contracts, mortgage liens, deeds of trust liens, or other liens not subordinated to this Easement, and (iv) no consent of any third party is required for Grantor to enter into this Easement. [Add if applicable: (v) each person and/or entity signing on behalf of Grantor is authorized to do so, and/or (vi) Grantor is duly organized and legally existing under the laws of the Commonwealth of Virginia and/or (vii) all beneficiaries' consents have been obtained to enter into this Easement.]
- **4. ACCEPTANCE**. Grantees accept this conveyance, which acceptance is evidenced by the signature of their duly-authorized representatives.
- 5. INTERACTION WITH OTHER LAWS. This Easement does not permit any use of the Property that is otherwise prohibited by federal, state, or local law or regulation. Neither the Property, nor any portion of it, has been or shall be proffered or dedicated as open space within, or as part of, a residential subdivision or any other type of residential or commercial development; proffered or dedicated as open space in, or as part of, any real estate development plan; or proffered or dedicated for the purpose of fulfilling density requirements to obtain approvals for zoning, subdivision, site plan, or building permits. No development rights that have been encumbered or extinguished by this Easement shall be transferred to any other property pursuant to a transferable development rights scheme, cluster development arrangement, or otherwise.
- 6. CONSTRUCTION. Pursuant to the public policy of the Commonwealth of Virginia favoring land conservation, any general rule of construction to the contrary notwithstanding (including the common-law rule that covenants restricting the free use of land are disfavored and must be strictly construed), it is the intent of the parties hereto that this Easement and all language contained herein shall be liberally construed in favor of the grant to effect the purposes of the Easement and the policies and purposes of Grantees. If

any provision of this Easement is found to be ambiguous, an interpretation that is consistent with the purposes of this Easement (to protect the conservation values of the Property and prevent the exercise of reserved rights in a way that would impair such values) and that would render the provision valid shall be favored over any interpretation that would render it invalid. Notwithstanding the foregoing, lawful acts or uses consistent with the purposes of and not expressly prohibited by this Easement are permitted on the Property. The restrictions and other provisions of this Easement shall be construed and applied in a manner that will not prevent it from being a qualified conservation contribution.

- **7. REFERENCE TO EASEMENT IN SUBSEQUENT DEEDS**. This Easement shall be referenced by deed book and page number, instrument number, or other appropriate reference in any deed or other instrument conveying any interest in the Property. Failure of Grantor to comply with this requirement shall not impair the validity of the Easement or the conveyance or limit the Easement's enforceability in any way.

Grantor shall notify each Grantee in writing at or prior to closing on any *inter vivos* transfer, other than a deed of trust or mortgage, of all or any part of the Property.

In addition, Grantor agrees to notify each Grantee in writing before exercising any reserved right, which may have an adverse effect on the conservation interests associated with the Property as encumbered by this Easement. (The purpose of requiring such notice is to afford each Grantee an adequate opportunity to monitor such activities to ensure that they are carried out in a manner consistent with the purposes of this Easement; such notice shall describe the proposed activity in sufficient detail to allow each Grantee to judge the consistency of the proposed activity with the purposes of this Easement.)

Failure of Grantor to comply with these requirements shall not impair the validity of the Easement or limit its enforceability in any way.

9. TAX MATTERS. The parties hereto agree and understand that any value of this Easement claimed for tax purposes as a charitable gift must be fully and accurately substantiated by an appraisal from a qualified appraiser as defined in Treasury Regulation Section 1.170A-13(c)(5), and that the appraisal is subject to review and audit by all appropriate tax authorities. Grantees make no express or implied warranties that any tax benefits will be available to Grantor from conveyance of this Easement, that any such tax benefits might be transferable, or that there will be any market for any tax benefits that might be transferable.

- **10. NO MERGER**. Grantor and Grantees agree that in the event that either Grantee acquires a fee interest in the Property, this Easement shall not merge into the fee interest, but shall survive the deed and continue to encumber the Property.
- 11. ASSIGNMENT BY GRANTEES. Assignment of this Easement is permitted, but neither Grantee may transfer or convey this Easement unless Grantee(s) condition(s) such transfer or conveyance on the requirement that (i) all restrictions and conservation purposes set forth in this Easement are to be continued in perpetuity, (ii) the transferee then qualifies as an eligible donee as defined in IRC Section 170(h)(3) and the applicable Treasury Regulations, and (iii) the transferee is a public body as defined in Section 10.1-1700 of the Open-Space Land Act.
- **12. GRANTEES' PROPERTY RIGHT.** Grantor agrees that the conveyance of this Easement gives rise to a property right, immediately vested in Grantees, with a fair market value that is equal to the proportionate value that this Easement on the Effective Date bears to the value of the Property as a whole at that time.
- 13. CONVERSION OR DIVERSION. Grantor and Grantees intend that this Easement be perpetual and acknowledge that no part of the Property may be converted or diverted from its open-space use except in compliance with the provisions of Section 10.1-1704 of the Open-Space Land Act, which does not permit loss of open space.
- 14. EXTINGUISHMENT. If any unexpected change in the conditions surrounding the Property can make impossible or impractical the continued use of the Property for the conservation purposes of this Easement, the provisions of this Easement can be extinguished through a judicial proceeding. In such case, on a sale or exchange of the Property subsequent to and resulting from such an extinguishment, Grantees shall be entitled to a portion of the proceeds at least equal to the proportionate value of this Easement computed as set forth in Section V, Paragraph 12 above. Grantees shall use all their share of the proceeds from the sale of the Property in a manner consistent with the conservation purposes of this Easement and the Open-Space Land Act.
- 15. AMENDMENT. Grantees and Grantor may amend this Easement to enhance the Property's conservation values or add to the restricted property by an amended deed of easement, provided that no amendment shall (i) affect this Easement's perpetual duration, (ii) conflict with or be contrary to or inconsistent with the conservation purposes of this Easement, (iii) reduce the protection of the conservation values, (iv) affect the qualification of this Easement as a "qualified conservation contribution" or "interest in land", (v) affect the status of either Grantee as a "qualified organization" or "eligible donee", or (vi) create an impermissible private benefit or private inurement in violation of federal tax law. No amendment shall be effective unless documented in a notarized writing executed by each Grantee and Grantor and recorded in the Clerk's Office of the Circuit Court of Albemarle County, Virginia.
- **16. COST RECOVERY CHARGES.** Each Grantee reserves the right to recover its costs incurred in responding to requests initiated by Grantor involving matters such as boundary

line adjustments, easement amendments, project reviews for ecosystem services, preparation of reports to facilitate sales, access or utility easements over the Property, and review of gas or oil plans. Such cost recovery charges shall be determined and periodically adjusted by the Grantor, as set forth in a published fee schedule.

- 17. **JOINT OWNERSHIP**. If Grantor at any time owns the Property or any portion of or interest therein in joint tenancy, tenancy by the entirety, or tenancy in common, all such tenants shall be jointly and severally liable for all obligations of Grantor set forth herein.
- **18. SEVERABILITY**. It is the express intent of the parties hereto that all provisions of this Easement be considered and construed as part of the whole and that no provision shall be applied in isolation without consideration of the overall purposes of this Easement. Nevertheless, if any provision of this Easement or its application to any person or circumstance is determined by a court of competent jurisdiction to be invalid, the remaining provisions of this Easement shall not be affected thereby.
- **19. ENTIRE AGREEMENT**. This instrument [*Add if applicable*: Schedule(s) \_\_\_\_, *and/or* Exhibit(s) \_\_\_\_\_] set(s) forth the entire agreement of the parties with respect to this Easement and supersede(s) all prior discussions, negotiations, understandings, or agreements relating to the Easement.
- **20. CONTROLLING LAW**. The interpretation and performance of this Easement shall be governed by the laws of the Commonwealth of Virginia and the United States, resolving any ambiguities or questions of the validity of specific provisions in a manner consistent with the provisions of Section V, Paragraph 6 above in order to give maximum effect to its conservation purposes.
- 21. RECODIFICATION AND AMENDMENT OF STATUTES AND REGULATIONS
  This Easement cites various federal and state statutes and regulations applicable to openspace easements. In the event that such statutes or regulations are re-codified or amended,
  this Easement will be interpreted and enforced according to the re-codified or amended
  statutes and regulations most closely corresponding to those cited herein and carrying out
  the purposes recited herein.
- **22. RECORDING.** This Easement shall be recorded in the land records in the Circuit Court Clerk's Office of the County of Albemarle, Virginia, and either Grantee may re-record it any time as may be required to preserve its rights under this Easement.
- **23. COUNTERPARTS**. This Easement may be executed in one or more counterpart copies, each of which, when executed and delivered shall be an original, but all of which shall constitute one and the same Easement. Execution of this Easement at different times and in different places by the parties hereto shall not affect the validity of the Easement.
- **24. DEFINITIONS.** For purposes of this Easement, the phrase "Effective Date" shall mean the date upon which this Easement was first put to record in the Office of the Clerk of the Circuit Court of Albemarle County, Virginia. The words "currently" or "existing" shall

mean currently or existing on the Effective Date. Time shall be calculated in calendar days, not business days.

| [Add Additional Grantor paragraph, when only one spouse owns the Property or portions thereo  | of.]                                     |
|---|--|
| , Additional Grantor, husband/wife of Grantor, joins in the execution of the Easement to evidence his/her consent to the gift of easement herein made and its exclusion from the augmented estate of Grantor pursuant to Virginia Code § 64.2-308.9 A.2. as now written hereafter amended.  | om                                       |
| [Subordination, if applicable, herein the Lender, is the note holder under a certain deed of trust dat and recorded in the Clerk's Office of the Circuit Court of Albemarle County, Virginia Deed Book at Page, which subjects the Property [or a portion of the Propert to the Lender's lien. The Lender hereby consents to the terms, conditions, and restrictions of the Easement, agrees that the lien represented by said deed of trust shall be held subject to the Easement to give effect to the subordination of such deed of trust to this Easement. The Trustee join(s) in the execution of this Easement to confirm that in the event of foreclosure under the deed of trust or other sale of the property described in the deed of trust under judicial or non-judic proceedings, the property will be sold subject to this Easement. [If applicable: It is understood the parties hereto that the granting of the deed of trust/deed on a portion/portions of the Proper constitutes a division of the Property unless and until such deed of trust has been released | ty] this this this e(s) eed cial by erty |

WITNESS the following signatures and seals: [Counterpart signature pages follow.]

### [Counterpart signature page 1 of 4 of deed of open-space easement]

|                                    | Grantor                                    |    |
|------------------------------------|--|----|
|                                    |  |    |
|                                    | Grantor                                    |    |
| COMMONWEALTH OF VIR CITY/COUNTY OF |  |    |
| The foregoing instrum 20 by        | ent was acknowledged before me this day of | ,  |
|                                    | Notary Public                              |    |
| (SEAL)                             | My commission expires: Registration No     |    |
| COMMONWEALTH OF VIR CITY/COUNTY OF |  |    |
| The foregoing instrument was       | acknowledged before me this day of, 20     | by |
|                                    | Notary Public                              |    |
| (SEAL)                             | My commission expires: Registration No.    |    |

## [Counterpart signature page 2 of 4 of deed of open-space easement]

| Accepted:             |               |                |  |  |
|-----------------------|---------------|----------------|--|--|
| ALBEMARLE CONSE       | RVATION EASEM | MENT AUTH      | ORITY,                                       |  |
|                       |               |                |  |  |
| By:                   |               |                |  |  |
| By: Jay G. Fennell, C | hairman       |                |  |  |
| COMMONWEALTH O        |               |                |  |  |
| CITY/COUNTY OF        |               |                | _, TO WIT:                                   |  |
| The foregoing, 20     |               |                | d before me this<br>of the Albemarle Conserv |  |
| Authority.            | - ,           | ,              |  |  |
|                       |               |                |  |  |
|                       |               |                | Notary Public                                |  |
|                       | My comr       | mission expire | es:  |  |
| (SEAL)                |               |                |  |  |
| Approved as to Form:  |               |                |  |  |
|                       |               |                |  |  |
|                       |               |                |  |  |
|                       |               |                |  |  |
| Albemarle Count       | y Attorney    |                |  |  |

## [Counterpart signature page 3 of 4 of deed of open-space easement]

|                                  | Lender:   |   |
|----------------------------------|---|---|
|                                  | Ву:   |   |
|                                  | Its:  |   |
| COMMONWEALTH OF VICITY/COUNTY OF | IRGINIA,, TO WIT:   |   |
|                                  | rument was acknowledged before me this [name of officer], | • |
| <i>officer</i> ] of              | [name of corporation], an, on behalf of the corporation.  |   |
|                                  | Notary Public   |   |
|                                  | My commission expires:                                    |   |
| (SEAL)                           | Registration No.  |   |

## [Counterpart signature page 4 of 4 of deed of open-space easement] , Trustee COMMONWEALTH OF VIRGINIA, CITY/COUNTY OF \_\_\_\_\_, TO WIT: The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_\_, 20\_\_\_\_ by \_\_\_\_\_\_\_, Trustee. Notary Public My commission expires: (SEAL) Registration No. COMMONWEALTH OF VIRGINIA, CITY/COUNTY OF \_\_\_\_\_\_, TO WIT: The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_\_\_, 20\_\_\_\_\_ by \_\_\_\_\_\_\_\_\_, Trustee. Notary Public My commission expires:

Registration No. \_\_\_\_\_

(SEAL)