

**THE PRESERVATION ALLIANCE FOR GREATER PHILADELPHIA
DEED OF PRESERVATION EASEMENT**

THIS DEED OF PRESERVATION EASEMENT (the “Easement”) is made this ____ day of [MONTH YEAR], by [PROPERTY OWNER] (the “Grantor”), and **THE PRESERVATION ALLIANCE FOR GREATER PHILADELPHIA**, a not-for-profit corporation organized under the laws of the Commonwealth of Pennsylvania (the “Grantee”).

Background

A. Grantor has legal and equitable fee simple title to the parcel of land and improvements known as [PROPERTY ADDRESS] more particularly described in Exhibit A attached hereto and made a part hereof (the “Property”).

B. The building located on the Property, including all facades of the building, windows and doors, and any improvements, the entirety of the roofs and chimneys of the building and any improvements, and the interior of the building and any improvements (collectively, the “Building”) and the open space on the property (the “Open Space”) contributes to the historic aspects of the City of Philadelphia. Grantee considers the Building to represent a valuable example of a historic architectural style worthy of preservation.

C. Grantee is a qualified conservation organization having as its primary purpose the preservation of historic sites and structures and the conservation of historic and significant open space. Grantee is authorized to acquire and accept interests in historic sites and structures and historic and significant open space including easements.

D. The donation of the within Easement to Grantee will further Grantee’s goal of fostering the conservation of the region’s heritage of historically significant structures with aesthetic, architectural, scenic and/or open space values.

E. Grantor and Grantee understand that, in addition to the easement contained in this Easement, Grantee has been and expects to continue to be the recipient of preservation easements and open space easements on other properties in Pennsylvania and elsewhere.

F. The grant of this Easement will impose restrictions on the development and maintenance of the Buildings and Open Space in perpetuity (unless indicated otherwise below) and will impose on Grantor and subsequent owners certain continuing maintenance obligations affecting the Buildings and Open Space on the Property. The grant of the Easement will give Grantee and any subsequent holder of the Easement the right to enforce the terms and conditions of this Easement forever.

G. Grantor desires to grant to Grantee, and Grantee desires to accept, the Easement on terms and conditions set forth below.

TERMS AND CONDITIONS

Intending to be legally bound hereby, in consideration of the mutual promises herein contained, and in further consideration of other good and valuable consideration paid by Grantor to Grantee,

the receipt and sufficiency of which are hereby acknowledged, Grantor and Grantee agree and declare as follows:

1. Term and Grant.

Grantor hereby grants and conveys to Grantee an estate, interest and easement in the Buildings and Open Space as shown in Exhibit C, for the preservation of historic, architectural, and scenic values of the nature and character and to the extent set forth in this Easement, to constitute a servitude and covenant upon the Property, running with the land for the benefit of and enforceable by Grantee, to have and to hold the said estate, interest and easement subject to and limited by the provisions of this Easement, to and for Grantee's proper uses forever.

2. Scope of Grantee's Estate, Interest and Easement.

The Easement herein granted conveys to Grantee an interest in the Property consisting of the benefits of the following covenants and undertakings by Grantor:

a. Without the prior written consent of Grantee, Grantor shall not cause, permit or suffer any construction, alteration, remodeling, decoration, demolition, dismantling, destruction, or other activity which would affect or alter in any material way the appearance of the Building or the Open Space, as shown in Exhibit C, except as specifically required herein pursuant to Exhibit B and/or authorized pursuant to Paragraph 7(b) hereof.

b. Grantor, at Grantor's sole expense, shall maintain the Building and Open Space at all times and shall keep the Buildings and Open Space in a state of good repair and shall make sure that the appearance of the Buildings and Open Space, as viewed from any location on any street on or off the Property shall not be permitted to deteriorate in any material way, and to this end, Grantor shall comply with *The Secretary of Interior's Standards for the Treatment of Historic Properties with Guidelines for Preserving, Rehabilitating, Restoring and Reconstructing Historic Buildings* (ISBN 0-16-048061-2; 1995), as amended (the "Standards"), and the Restoration Program and the Minimum Maintenance Program set forth in Exhibit B to this Easement.

c. Grantor shall not cause, permit or suffer the removal of any of the original or historic building elements identified on Exhibit C to this Easement from the Buildings and Open Space, unless consistent with the preservation and conservation objectives of this Easement and with the prior written permission of Grantee, except when the replacement of those elements is required because of imminent danger to the building or to comply with any applicable code, ordinance or law.

d. Grantor shall permit Grantee access to the Property at such reasonable times and upon reasonable prior notice as Grantee may request for the purpose of examining and testing of all structural portions of the Buildings, the materials and elements of the Buildings and such portions of the Buildings and Open Space as are subject to the Easement.

e. Grantor acknowledges that the setting in which the Property is located, including the scale, design, massing and materials of existing and new buildings in the nearby area,

affects the historic value of the Property and that Grantee's interest in an appropriate setting is as direct, substantial and immediate as Grantor's interest. The Grantor authorizes Grantee to protect Grantee's interest, through advocacy or litigation, in any federal, state, or local board, commission, council or agency for appropriate preservation of existing buildings or features and/or for appropriate new development in the nearby area.

f. Grantor shall permit Grantee to display on the Property, at its discretion, a small marker or sign evidencing its ownership of the Easement granted herein. The location, size, design and material of any such marker or sign shall be mutually acceptable to Grantor and Grantee.

3. Existing Conditions, Initial Level of Preservation, Alterations and Preservation Objectives.

a. Exhibit B-1, entitled Initial Restoration, indicates the required work, if any, necessary to be done on the Buildings and Open Space (the "Initial Restoration"). Exhibits B-2 and B-3 also set forth permitted future restoration and permitted alterations to the Property, respectively.

b. Exhibit B-1 and certain photographs, plans and specifications, attached hereto as Exhibit C, shall constitute the aesthetic, architectural, landscape and historic condition in which the appearance of the Buildings and Open Space is to be maintained and preserved after completion of the work required pursuant to Paragraph 3(a) above.

c. Except as otherwise provided in this Easement, such photographs, plans and specifications set forth in Exhibit C, as supplemented by Exhibit B-1, shall constitute conclusive evidence of the appearance of the Property and built elements on the Property which are not to be materially affected or altered pursuant to Paragraph 2(a) above and are to be maintained pursuant to Paragraphs 2(b) and 2(c) above.

4. Rights of Grantee if Property Destroyed.

In the event that the Buildings and/or Open Space located on the Property are, by reason of fire, flood, earthquake or other disaster of any kind whatsoever:

a. if partially destroyed, to such an extent or of such nature that the appearance of the Buildings and/or Open Space is altered from the Building's and Open Space's appearance in the photographs, plans and specifications referred to in Paragraph 3 above, but is not totally destroyed in the reasonable judgment of Grantee, then Grantor shall, as promptly as is practicable, restore the Buildings and Open Space to a condition so that the appearance is restored to that shown in such photographs, plans and specifications. In addition, Grantor and Grantee, after consultation with each other, may agree upon such other restoration that is consistent with the architectural character, including height, bulk, mass, materials and colors, and landscape character, of the remainder of the buildings and of historic residential buildings and open space located in the area; and

b. if totally destroyed, then Grantor shall not thereafter erect on the Property any building the appearance of which as seen from any street on or off the Property is inconsistent with the architectural character, including height, bulk, mass, materials and colors, of the historic buildings in the local area.

Upon satisfactory completion of such restoration, the appearance of the Buildings and Open Space to which Paragraphs 2(a), 2(b) and 2(c) above shall apply shall be the restored appearance of the Buildings and Open Space. If Grantor shall fail to restore the Buildings and Open Space promptly as required under this Paragraph 4, Grantee shall have all the rights given it under Paragraph 5 below.

5. Defaults and Remedies of Grantee.

a. Grantor's failure to comply with any provision of this Easement (a "Default") in the manner required for thirty (30) days following written notice by Grantee shall constitute an "Event of Default" by Grantor; provided however, that if the nature of Grantor's Default is such that more than thirty (30) days are reasonably required for its cure, then it shall not be deemed to be an Event of Default if Grantor commences a cure within said thirty (30) day period and thereafter diligently prosecutes such cure to completion.

b. In an Event of Default, Grantee shall have all remedies available to it at law or equity including, without limitation, (i) the right to commence legal proceedings to seek specific performance of the terms of this Easement, to enjoin any breach of this Easement by temporary and/or permanent injunction, and/or to require the restoration of the Building and Open Space to the condition required by this Easement; and (ii) the right to (A) with reasonable prior notice enter upon the Property in order to correct any breaches including restoring the Property and making repairs, (B) hold Grantor responsible for the cost thereof, and (C) obtain a judgment against Grantor for the cost of all labor performed and materials furnished to complete such improvements. Grantor agrees that money damages shall be insufficient compensation to Grantee for any breach of the Easement and Grantee shall not be obligated to prove either actual damages or the inadequacy of otherwise available legal remedies. The exercise by Grantee of one remedy and the failure to exercise any remedy shall not have the effect of waiving or limiting the use of any other remedy or the use of such remedy at any other time.

c. Without limiting the foregoing and in addition any and all other remedies, if Grantor has caused, permitted or suffered any construction, alteration, remodeling, decoration, demolition, dismantling, destruction, or other activity which affects or alters in any material way the appearance of the Property in breach of Paragraph 2.a., then Grantor shall remit to Grantee an amount equal to one-half percent (.5%) of the Property's assessment as determined by the Philadelphia County Office of Property Assessment to cover, in part, the Grantee's administrative costs in enforcing the Easement.

d. Grantor shall reimburse Grantee for all reasonable costs and attorneys' fees expended by Grantee to further the purposes of this Easement. Any such amounts not reimbursed by Grantor within ten (10) days after receipt by Grantor of an invoice with reasonable supporting documentation shall to the maximum extent permitted by law constitute a lien on the Property,

subordinate to the lien of any mortgage on the Property, accruing interest at the rate of 12% *per annum*.

6. Assignment, Successors and Assigns.

a. The terms of this Easement shall constitute a covenant running with the Property for the benefit of Grantee and its successors and assigns and shall extend to and be binding upon Grantor and all persons hereafter claiming by, under or through Grantor, or having any interest therein derived through Grantor. The word "Grantor" when used herein shall include all such persons whether or not such persons have signed this instrument or had any interest in the Property at the time it was signed.

b. Grantor shall promptly notify Grantee in writing of a transfer of all or a portion of the Property, but in no event later thirty (30) days from the date of such transfer.

c. Grantee agrees that it will hold this Easement exclusively for conservation purposes: that is, it will not transfer this Easement for money, other property or services. Grantee may, however, assign or transfer its interest hereunder to any agency of the Commonwealth of Pennsylvania or the United States of America; or to one or more organizations whose purpose includes, *inter alia*, the preservation of historically important structures and land areas, provided such organization has the ability to properly enforce this Easement and, further provided, that such organization is operated exclusively for charitable, educational, religious, or scientific purposes as shall at the time qualify as an exempt organization under Section 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provisions of any future United States Internal Revenue Code). In the event of any assignment or transfer of Grantee's interest, Grantee will require the recipient of its interest to enforce this Easement. Subject to the foregoing provisions of this Paragraph 6, the terms and conditions of this Easement shall be binding upon and inure to the benefit of the heirs, executors, administrators, successors and assigns of the parties hereto.

7. Reservation.

a. Grantor reserves the free right and privilege to the use of the Property for all purposes not inconsistent with the grant made herein. Nothing herein shall be construed to grant to the general public or any other persons, other than Grantee and its agents, the right to enter upon the Property, pursuant to Paragraph 2(d) above, for the purposes set forth herein.

b. Nothing contained in this Easement shall be interpreted to authorize, require or permit Grantor to violate any applicable ordinance, code or law relating to building materials, construction methods or use. In the event of any conflict between any such law and the terms hereof, Grantor shall promptly notify Grantee of such conflict and Grantor and Grantee shall agree upon such modifications to the Building and Open Space consistent with sound preservation practices and consistent with the requirement of such law. In cases where hazardous conditions require immediate remedies, Grantor may proceed without prior Grantee approval but shall make every reasonable effort to notify Grantee and to comply with any reasonable Grantee suggestions of ways to make remedial actions compatible with the historic appearance of the Building and Open Space.

8. Acceptance.

Grantee hereby accepts the right and interest granted to it in this Easement. Grantee shall administer this Easement for the conservation and preservation of the Building and Open Space and to further Grantee's purposes of fostering the conservation of the region's heritage of historically significant sites and structures with aesthetic, architectural, environmental, historic, scenic and/or open space values.

9. Grantor's Insurance.

Grantor shall maintain, at Grantor's own cost, insurance against loss and damage to the property and Building, written at replacement cost value and with a replacement cost endorsement, and comprehensive general liability insurance, including contractual liability, to cover Grantor's obligations under the indemnity provisions of this Easement, against claims for personal injury, death and property damage in such amounts as would normally be carried on a property such as that subject to this Easement. Such insurance shall include Grantee's interest and name Grantee as an additional insured and shall provide for at least thirty (30) days' notice to Grantee before cancellation and that the act or omission of one insured will not invalidate the policy as to the other insured party. Furthermore, Grantor shall deliver to Grantee certificates or other such documents evidencing the aforesaid insurance coverage at the commencement of this grant and a new certificate at least thirty (30) days prior to the expiration date of each such policy. All insurance policies required by this section will be primary with respect to any insurance maintained by Grantee.

10. Release and Indemnification.

Grantor shall be responsible for and does hereby release and relieve Grantee, its officers, directors, agents, and employees, and shall defend and hold Grantee, its officers, directors, agents and employees, harmless of, from and against any and all liabilities, obligations, damages, penalties, claim, costs, charges and expenses which may be imposed upon or incurred by Grantee by reason of by reason of (a) the grant of the Easement to Grantee; (b) the breach by Grantor of any representation, warranty, or covenant of Grantor contained herein; or (c) any act or omission of Grantor; or (d) any loss of life, personal injury and or damages to property occurring in or around the Property.

11. Estoppel Certificate.

Grantee shall at any time and from time to time, within twenty (20) days after Grantor's written request, execute, acknowledge and deliver to Grantor a written instrument stating that Grantor is in compliance with terms and conditions of this Easement, or if Grantor is not in compliance with this Easement, stating what violations of this Easement exist. If this Easement is extinguished, Grantor and Grantee shall execute and acknowledge a written instrument to that effect that Grantor will cause to be recorded.

12. Condemnation and Extinguishment.

a. In the event a subsequent unexpected change in the conditions of or surrounding the Property (including but not limited to a total or partial condemnation) makes impossible or impractical the continued use of the Property for conservation or preservation purposes, or in the event of any extinguishment of this Easement by judicial decree, then this Easement shall be deemed to have been extinguished, and the parties will cooperate to so extinguish this Easement by judicial proceedings, and all of the Grantee's proceeds (as determined in Subparagraph 12(c) below) from a subsequent sale or exchange of the Property will be used in a manner consistent with the conservation and preservation purposes set forth in this Easement.

b. In the event of a partial condemnation where the portion of the Property not taken is capable of continued reasonable use, and provided that the portion of the Property not taken contains a material portion of the Building and/or Open Space subject to this Easement, and further provided that the remaining Building and/or Open Space will continue to serve the conservation and preservation purposes of this Easement, then this Easement shall remain on those portions of the Building and/ or Open Space not taken by condemnation. For purposes of determining Grantor's and Grantee's rights with respect to the portion of the Easement extinguished by condemnation, the portion of the Easement extinguished shall be the percentage representing the change in square foot area of the Building and Open Space from that initially subject to the Easement to that remaining subject to the Easement after the condemnation.

c. Grantor and Grantee agree that the grant of this Easement gives rise to a property right, immediately vested in the Grantee, with a fair market value that is at least equal to the proportionate value that the perpetual conservation and preservation restrictions at the time of the grant bear to the value of the Property as a whole at that time; and that the proportionate value of the Grantee's property rights shall remain constant. If and when any of the change in conditions described in Subparagraph 12(a) above give rise to the extinguishment of a perpetual conservation and/or preservation restriction in this Easement, the Grantee, on a subsequent sale, exchange or involuntary conversion of the Property, or a part thereof, shall be entitled to portion of the proceeds at least equal to that proportionate value of the perpetual conservation or preservation restrictions. Grantor and Grantee shall join in appropriate actions to recover the full value of the Property and all incidental or direct damages resulting therefrom. All expenses incurred by Grantor and Grantee in pursuing this action shall be paid out of the recovered proceeds. The remaining recovered proceeds (including the proceeds from any sale of the Property ever encumbered by the restrictions of this Easement) less any sums lawfully and properly paid to third parties shall be distributed between the Grantor and Grantee as set forth in this subparagraph.

13. Review, Approval and Additional Costs.

a. Whenever its consent is required, Grantee has the discretion to give or withhold its consent, conditionally or unconditionally, but such consent shall not be unreasonably withheld, conditioned or delayed. The basis for Grantee's review of a request for consent, e.g., under Paragraph 2.a., shall be the Standards and shall be consistent with its mission.

b. Grantee shall respond to requests for consent within sixty (60) days (except under extraordinary circumstances) or such consent shall be deemed to have been given. It is further agreed that whenever the consent of Grantee is required or requested, Grantor shall bear the reasonable costs of Grantee's review, including inspections for purpose of giving estoppel certificates, and Grantor agrees that the costs for Grantee's review shall include reasonable architectural fees and Grantee's reasonable administrative expenses in processing Grantor's request.

c. Review and approval by the Grantee for proposed alterations does not supersede or replace the review and approval by any municipal authority for conformance with building code, zoning, or other such related matters.

14. Change of Building Use; No Subdivision or Assemblage Into Larger Parcel.

Grantor shall not permit or allow to occur any change in use of the Property without prior written permission of Grantee. Grantor shall not subdivide the Property, or act to permit its assemblage into a larger parcel. However, Grantor retains the right to convert the Property to condominium ownership and to subdivide the Property into condominium units pursuant to a recorded Declaration of Condominium. Moreover, Grantor shall not convey development rights or permit any open space of the Property to be included in any zoning calculation for the benefit of another property.

15. Archeological Excavation.

No archeological investigation or excavation, professional or amateur may be undertaken at the Property without the prior written approval of the Pennsylvania Historical and Museum Commission and Grantee.

16. Prohibition Against The Storage, Disposal or Handling of Waste.

Grantor shall not permit or suffer the use, storage, placement, dumping or disposal of hazardous chemicals, solid or liquid waste or other hazardous material on the Property. This prohibition shall not preclude: (a) the use of chemical fertilizers and nutrients necessary or appropriate for the protection and promotion of the vegetation (including any gardens) on the Property, pesticides and poisons normally used on a large urban commercial or residential property for the control of rodents or insects, provided such use and storage of such chemicals is permitted by law and regulation; (b) the composting of biodegradable garden and household waste generated on the Property; and (c) the use of normal quantities of household supplies or products (such as cleaning supplies).

17. Certification of Grantee's Status.

By executing this Easement, Grantor and Grantee certify, under penalty of perjury, that the Grantee is a qualified organization (as defined in Paragraph (3) of §170(h) of the Internal Revenue Code) and has a primary purpose of historic preservation and open space preservation and has the

resources to manage and enforce the restrictions created by the Easement and has a commitment to do so.

18. Notices.

For all notices other than those pursuant to Paragraph 6(b), notices or other communications hereunder shall be in writing and shall be deemed to have been given:

a. if hand delivered or sent by express mail or reputable overnight delivery service or by courier, postage prepaid, then, if and when delivered to the respective parties at the below listed addresses (or at such other address as the party may hereafter designate for itself upon ten (10) days prior notice to the other party as required hereby), or

b. if mailed, then on the next business day following the date on which such communication is deposited in the U.S. mail, by first-class registered or certified mail, return receipt requested, postage prepaid, and addressed to the respective parties at the below addresses (or at such other address as a party may hereafter designate for itself upon ten (10) days prior notice to the other party as requested hereby):

If to Grantor:

[OWNER NAME AND ADDRESS]

with a copy to:

[Lawyer Name and Address]

DRAFT

If to Grantee:

Preservation Alliance for Greater Philadelphia
1608 Walnut Street, Suite 1702
Philadelphia, PA 19103
Attention: Paul R. Steinke, Executive Director

In the event notice is required to be given to one or more of the mortgagees who consented and subordinated to this Easement, notice shall be given in the form required and at the address indicated on any mortgagee consent.

19. Counterparts; Entire Agreement.

This document may be executed in one or more counterparts which when taken together shall be deemed to be the original. This Easement, including the Exhibits, reflect the entire agreement between Grantor and Grantee and any prior or simultaneous correspondence, understandings, agreements, and representations are null and void unless contained herein.

20. Third-Party Beneficiary.

The Pennsylvania Bureau for Historic Preservation (the “Bureau”) shall be deemed a third-party beneficiary of this Easement. The Bureau shall have the right, but not the obligation, to enforce this Easement in the event that the Grantee is unable or fails to act. Anything herein to the contrary notwithstanding in this Agreement, all rights, privileges and benefits are for the exclusive use of the parties hereto, and there shall be no third-party beneficiary thereof, except as provided in this paragraph.

21. Miscellaneous.

No delay or failure to insist on performance in any instance of any obligation hereunder shall be deemed a waiver of such performance, or any subsequent performance of such obligation, or of the performance of any other obligation hereunder. No waiver shall be effective unless it is in writing and executed by Grantee. The failure to inspect the Property shall not constitute a waiver of any right hereunder.

[Signatures on next page.]

DRAFT

IN WITNESS WHEREOF, the parties hereto have executed this Easement the day and year first above set forth.

GRANTOR:

_____ By: _____
[OWNER]

GRANTEE:

The Preservation Alliance for Greater Philadelphia,
a Pennsylvania not-for-profit corporation

_____ By: _____
Paul R. Steinke, Executive Director

DRAFT

I CERTIFY THAT THE ADDRESS OF ABOVE-NAMED GRANTEE IS:

THE PRESERVATION ALLIANCE FOR GREATER PHILADELPHIA
1608 Walnut Street, Suite 1702
Philadelphia, Pennsylvania, 19103
215-546-1146

Paul R. Steinke
Executive Director

COMMONWEALTH OF PENNSYLVANIA :
: SS:
COUNTY OF PHILADELPHIA :

On this the ____ day of [Month], 2021, before me, a Notary Public of the Commonwealth of Pennsylvania, personally appeared [AUTHORIZED REPRESENTATIVE] a party to the foregoing agreement, and acknowledged that, being authorized to do so, he executed the foregoing instrument for the purposes therein contained by signing the name of such entity by himself as such officer.

NOTARY PUBLIC

My Commission Expires:

DRAFT

COMMONWEALTH OF PENNSYLVANIA :
: SS:
COUNTY OF PHILADELPHIA :

On this the ____ day of [Month], 2021, before me, a Notary Public of the Commonwealth of Pennsylvania, personally appeared **Paul R. Steinke**, who acknowledged himself to be the Executive Director of The Preservation Alliance for Greater Philadelphia, a Pennsylvania not-for-profit corporation, a party to the foregoing agreement, and acknowledged that, being authorized to do so, he executed the foregoing instrument for the purposes therein contained by signing the name of such corporation by himself as such officer.

NOTARY PUBLIC

My Commission Expires:

LIST OF EXHIBITS
for
DEED OF FACADE AND OPEN SPACE EASEMENT
from
[OWNER]
to
THE PRESERVATION ALLIANCE FOR GREATER PHILADELPHIA
for
[PROPERTY ADDRESS]

EXHIBIT A

Legal Description of Property

EXHIBIT B

- B-1** Initial Restoration
- B-2** Optional Future Restoration
- B-3** Permitted Future Alterations
- B-4** Minimum Maintenance Program

EXHIBIT C

Existing Conditions

DRAFT

EXHIBIT A
LEGAL DESCRIPTION OF PROPERTY
for a
preservation easement
for
[PROPERTY ADDRESS]

ALL THAT CERTAIN tract or piece of land with the buildings and improvements thereon erected.

SITUATE in the [xx] Ward of the City of Philadelphia.

BEGINNING at a point ...

Containing within said Parcel #.## Ac

Parcel #

DRAFT

EXHIBIT B
to
DEED OF PRESERVATION EASEMENT
for
[PROPERTY ADDRESS]

I. INITIAL RESTORATION

A. **[INITIAL RESTORATION REQUIREMENTS]**

II. OPTIONAL FUTURE RESTORATION

Optional Future Restoration is the making of changes to the existing Property to return the Property back to its original or historic condition. These changes are permitted but are not required. All work shall be in accordance with drawings and specifications which shall be submitted to and reasonably approved by Grantee, within sixty (60) days of receipt, prior to the start of work. In order to facilitate timely review and approval, Grantor shall submit conceptual and design proposals prior to the start of any construction drawings and specifications.

- A. Grantor may restore missing original building elements if such restoration work is based on photographic, physical, or other documentary evidence.

III. PERMITTED FUTURE ALTERATIONS

Permitted Future Alterations are changes which are permitted but which do not bring the Property back to their original or historic conditions. Grantor is permitted, but not required, to make certain alterations to the Property as set forth below, provided that such alterations comply with the following criteria for compatibility and visibility. All work shall be in accordance with drawings and specifications which shall be submitted to and reasonably approved by Grantee prior to the start of work.

Alterations shall comply with *The Secretary of Interior's Standards for the Treatment of Historic Properties with Guidelines for Preserving, Rehabilitating, Restoring and Reconstructing Historic Buildings* (ISBN 0-16-048061-2; 1995), especially "Guidelines for Rehabilitating Historic Buildings" pp. 61 to 164.

IV. MINIMUM MAINTENANCE PROGRAM

It is the Owner's responsibility to maintain the Property, to comply with all applicable codes and ordinances, and to provide for the protection of life and property. To the extent that Grantee's interest is involved, Grantor shall adhere to a maintenance schedule with respect to the Property at least as stringent as that set forth below. Grantor shall keep reasonable records with respect to inspection and replacement and shall make such records available to Grantee upon written notice from Grantee.

A. **EXTERIOR**

1. **MASONRY, INCLUDING BRICK AND STONE**

VISUAL INSPECTION SCHEDULE: Once a year, Spring or Fall, after a rainstorm.

OPERATION:

- a. Check for moist areas, cracks, crumbling material, loose pieces, missing mortar, and efflorescence (white discoloration).
- b. Check where moisture is entering masonry and repair any leaks in roofing, flashing, or joints between masonry and other materials.
- c. If significant cracks, surface spalling, or material deterioration is found, review condition of masonry with a registered architect, materials conservator, or restoration contractor experienced in evaluating masonry. Grantor shall cause work to be performed in accordance with consultant's recommendations reasonably approved by Grantee prior to start of work, and in accordance with the terms of this Deed.
- d. Masonry joints with loose or crumbling mortar are to be repointed using mortar which matches original in color, texture, constituent composition, profile, and workmanship. Mortar shall not be harder than surrounding masonry or original mortar.
- e. Repointing work shall be performed only in accordance with a proposal submitted to and reasonably approved by Grantee prior to start of work. Joints shall maintain original width and be tooled to substantially match original finish.
- f. Masonry shall not be cleaned except in accordance with a proposal submitted to and reasonably approved by Grantee prior to start of work. Cleaning shall be done with materials and techniques which will not damage the masonry. Sandblasting, wire brushes, grinders, sanding discs, or other abrasive methods shall not be used, nor shall any harsh chemical which weakens the masonry be applied. Materials and techniques shall be selected based on results of test patches.
- g. Snow removal materials which might damage masonry, e.g. salt, shall not be used, including areas adjacent to walls.
- h. Grantor shall use best efforts to patch masonry work, where needed, to substantially match the original in color and texture.

2. METALS: E.G., RAILS, FLASHING, GUTTERS

VISUAL INSPECTION SCHEDULE: Once a year, late Spring or early Fall, and after sustained winds higher than 60 m.p.h.

OPERATION:

- a. Check for cracks, warps, distortions or weak areas, loose or damaged seams, loose attachments, rust, holes, wear or deteriorated finishes.
- b. Replace damaged or missing sections to match existing sections using appropriate methods for specific metals. Repair leaks and weak areas.
- c. Reattach loosened metals to masonry, wood, or other substrate.

- d. Remove iron rust using materials and methods which will not accelerate pitting and corrosion of the metal. Where applicable, prime and paint according to Section IV.B.6, below.

3. **RAINWATER CONDUCTION SYSTEMS: GUTTERS, DRAINS, SCUPPERS, PARAPET AND OTHER FLASHINGS**

INSPECTION SCHEDULE: Once a year, Spring, Fall or Winter

OPERATION:

- a. Test for leaks or blocked sections of rainwater conduction systems.
- b. Clean system of any blockages and repair leaks. Remove leaves and other debris in Spring and after leaf fall.
- c. Check for any loose or missing gutters, including internal sections, downspouts or other system components. Reattach or replace as necessary.
- d. Any replacement sections shall match existing or be of a design, material, and installation similar to the historic era and architecture of the Building.

4. **CAULKING COMPOUND**

VISUAL INSPECTION SCHEDULE: Once a year, Spring or Fall

REPLACEMENT SCHEDULE: As required when materials fail

OPERATION:

- a. Check caulking for brittle, cracked or missing pieces.
- b. Remove any damaged area, clean, prime or seal according to manufacturer's specifications, provide backer rods and bond-breaker tape as required, replace caulk. Sealant shall be factory mixed color to substantially match adjacent construction or shall be paintable.

5. **WOODWORK: E.G., DOORS, WINDOWS, CORNICES**

VISUAL INSPECTION SCHEDULE: Once a year, Spring or Fall

OPERATION:

- a. Check for moisture damage, warping, splitting and unsound joints. Check window putty for cracks or missing sections.
- b. If wood is decayed, determine source of moisture, stop leaks, and replace decayed wood to match original material. Repair unsound or loosened joints. Replace missing wooden elements to match original in dimension, species, finish and workmanship.
- c. Paint and other finish coatings shall be in accordance with Section IV.6 below.

6. **PAINT**

VISUAL INSPECTION SCHEDULE: Once a year

REPLACEMENT SCHEDULE: Every 5 to 10 years when materials fail

OPERATION:

- a. Check for worn or bare spots, blistering, peeling, and mildew.
- b. Check where moisture is entering and stop leaks.
- c. Treat mildew with fungicide.
- d. Prepare surface by splitting blisters, scraping peeling areas, removing rust and sanding rough spots. Deteriorated paint finishes shall not be removed using sandblasting, open flame burning methods, or rotary mechanical tools. If removal of existing paint down to bare wood or metal surfaces is proposed, submit proposal indicating methods and materials to, and for reasonable approval by, Grantee.
- e. Prime and paint (two finish coats) with products compatible with the surface material and according to manufacturer's specifications.
- f. For ferrous metals, scrape and wirebrush deteriorated paint and rust from metal. Repaint.

7. GLASS

VISUAL INSPECTION SCHEDULE: Once a year

OPERATION:

- a. Check for cracked, broken or missing panes of glass.
- b. Where cracked glass is loose, replace. Replacement for art glass shall substantially match original. Replacement glass for other clear glass shall approximate original.

8. WALKWAYS, DRIVEWAYS, PATIOS

INSPECTION SCHEDULE: Annual

OPERATION:

- a. Check materials for cracks, loose elements, loose mortar joints, moist or bulging areas. Repair as necessary.
- b. Rebuild any unstable sections of walkways, walls, driveways or patios with particular attention to tripping or other safety hazards.
- c. Unclog any drains through walls or in impervious surface areas, or catch basins.
- d. Remove debris, trash and dead leaves from walks, stairs, driveways, or patios once a month.

9. ROOF

INSPECTION SCHEDULE: Annual

OPERATION:

- a. Keep trees trimmed roughly 10 feet from the roof horizontally and 15 feet vertically to avoid damage by squirrels.

B. STRUCTURAL CHECKPOINTS

INSPECTION SCHEDULE: Once a year

OPERATION:

- a. Check exposed exterior and interior surfaces of walls and foundations, with particular attention to areas of stairways, floor and wall openings, and changes in wall masonry material. Check for cracks, collapsing, leaning or bulging areas or other signs of uneven settlement, movement or structural deterioration.
- b. Check interior wall surfaces with particular attention to joints between side and front and rear walls, joints between floors and end walls, and joints between partitions and ceilings. Check for cracks, crumbled plaster, gaps, or other signs of movement.
- c. If deteriorated structural members, significant cracks or other signs of movement are observed, review structural condition of Building with a qualified engineer in order to ensure adequate safety standards and precautions. For remedial action which will affect the exterior appearance of the Building, Grantor shall submit a proposal for Grantee's review and reasonable approval prior to start of work. In cases where hazardous conditions require immediate remedies, Grantor may proceed without prior Grantee approval but shall make every reasonable effort to notify Grantee and to undertake remedial actions compatible with the historic appearance of the Building.
- d. Inspect Building annually for termites and other wood-damaging insects. Note evidence of insect activity: small holes in the wood, small piles of sawdust, clay tubes on pieces of wood, or actual insects. Inspection should be undertaken by a professional exterminator. Treat as necessary.
- e. Inspect Building for signs of cracking, differential movement and/or differential settlement at the areas where the different sections of the buildings are joined together.