



# FOR LANDS' SAKE

SUMMER 2012

NEWS & VIEWS FROM THE CENTRAL ARIZONA LAND TRUST

VOL12/NO.2

## Educational Workshops Provide Support for Local Landowners

by Matt Turner



*Photo courtesy of Matt Turner*

In April and May of 2012, Central Arizona Land Trust held two educational workshops focused on methods available to local land owners who wish to conserve open space. Both workshops were supported by a grant provided by the Yavapai County Community Foundation. The April workshop was titled **“The Nuts and Bolts of Conservation Easements for Professional Advisors.”** Those invited included local attorneys, CPAs, appraisers, financial planners and realtors. The workshop provided the opportunity to learn about conservation easements, how they work, the steps in creating one, types of lands or assets protected, and information about tax-related benefits. The event took place in the beautiful 3rd floor ‘Tis Gallery banquet hall with Pangaea Bakery catering a delicious lunch.

On May 24th CALT held its second 2012 workshop entitled **“Ranching into the Future: Protecting a Way of Life in the American West.”** This workshop focused on the needs of local Yavapai County landowners and ranching families who wish to learn not only about basic land protection tools, but also how new trends, ideas, and collaboration among ranchers, government, and non-government entities statewide may promote new perspectives in livestock and agricultural production within north-central Arizona. The Central Arizona Land Trust worked in cooperation with the Yavapai County Cooperative Extension who graciously provided their Prescott Rodeo Grounds office meeting room. Taco Don’s provided a tasty lunch at the event.

*continued on page 5*



LAND TRUST

Preserving Open Space in the Heart of Arizona

**Mission**

**The mission of the Central Arizona Land Trust is to preserve and protect open space, wildlife habitat and the scenic and cultural values of Central Arizona for future generations.**

The Central Arizona Land Trust was founded in 1989 as a local private, non-profit 501(c)(3) organization.

Donations are tax deductible as allowable by law.

For Lands' Sake is a regular publication to inform and educate its supporters and the community.

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# President's Message



Dear Friends in Conservation,

I would like to dedicate this issue to our board member, Dan Campbell, who is retiring after 28 years with The Nature Conservancy. Dan began his TNC tenure as the State Director of the Arizona Chapter, a position he held for 12 years. As State Director, he was instrumental in drafting creative legislation to create the \$20 million per year Arizona Heritage Fund from the state lottery to protect parks, recreation and wildlife. That fund has produced \$400M for conservation over twenty years. He oversaw the acquisition of TNC's Hassayampa River Preserve, Hart

Prairie Preserve, Hartwell Canyon, and Aravaipa Canyon, as well as Kartchner Caverns State Park and the first parcels protected along the San Pedro River. In partnership with then Governor Bruce Babbitt and AZ State Parks, he launched the Verde River Greenway natural area, a 6-mile corridor of protected lands along the river from Clarkdale to Cottonwood. He also co-produced the Desert Speaks television series, which provided a unique outlet for educating Arizonans about our State's natural wonders and last great places.

As a Country Program Director for Belize, the Bahamas and Jamaica, he oversaw creation of several national parks and marine protected areas in four countries. He also negotiated an \$11.6M Tropical Forest Conservation Debt for Nature Swap between the U.S. Treasury and the government of Belize, which was the first ever bi-national sovereign debt swap for conservation.

As the Verde River Program Director for the last 8 years, Dan focused on providing science to inform decision-making and policy, developing strategies to mitigate groundwater pumping, influencing fish & wildlife management, protecting key tracts of habitat and restoring surface flows to the Verde River. He worked with State Parks to expand the 6-mile Verde River Greenway boundary to include a 40-mile stretch of river flowing through the entire Verde Valley, and promoted the acquisition of the Verde Springs Preserve. He worked to launch flow restoration activities with irrigation ditch companies and championed efforts to fund this pioneering work.

Dan plans to continue living in the Prescott area, and will no doubt continue to contribute to conservation efforts in the region, even after his retirement. We are truly fortunate to have such an influential conservation advocate in our area. I am excited that he will now have more time to bring his considerable knowledge and experience to the Central AZ Land Trust!

Judy Clapp  
 President

# 50 Mile Feast

*August 25th at Chino Valley Farms Supports Local Agriculture*

Current economic conditions have made it challenging for farmers and ranchers to donate development rights on their family lands and difficult for non-profits or government agencies to buy them. Open space in Central Arizona is best protected by farms and ranches. If these historic land uses disappear, residential development will take their place, severely impacting water supply, wildlife habitat, and open space.

Arizona is known world-wide for its rich historic agricultural traditions – cowboys on the range and cotton farmers in the fields. The best way to assure the future of farms and ranches is to assure their economic viability. Currently there are several ‘movements’ that may help diversify agricultural income:

- The ‘local food movement’ is gaining popularity in many parts of the country. Farmers Markets, locally grown restaurant choices, community supported agriculture (CSA’s), roadside stands, and farm festivals featuring locally-produced food crops are examples of economic sustainability strategies for food growers. ‘Outstanding in the Field’ events have become very popular.
- Throughout Arizona the ‘green meat’ movement is gaining visibility with such local growers as Orme Ranch, Sky Island Brand / 47 Ranch, Routson Grass Fed Beef, and Perkinsville game and meat processors.

- The successful new Wine Coalition in the Verde Valley has teamed up with Sonoita vineyard growers in Cochise County. Several tasting rooms have been launched in Page Springs, Jerome and Old Town Cottonwood. A key partner in this sustainable agriculture initiative is the Verde Valley Regional Economic Organization and Yavapai College, which now has its own vineyards and majors in viticulture and enology thanks to Maynard Keenan’s Merkin Vineyards. See [www.caduceus.org](http://www.caduceus.org). In Chino Valley, Granite Creek Vineyards serves a similar role.

The Central Arizona Land Trust enthusiastically supports these and similar efforts throughout the state. Sustainable agriculture protects open space, serves as a local economic force, and provides “farm to table” products with reduced carbon load.

In an effort to support this movement, CALT is holding its first annual “50 Mile Feast”, an elegant dinner event that will take place in the lovely party space at Chino Valley Farms, **Saturday, August 25th at 5pm**. Local chefs will create gastronomic sensations utilizing fresh locally farmed produce from within a 50 mile radius. Please join local growers, ranchers, and chefs for a fabulous dinner. **Tickets are \$75 or \$550 for a table of 8**. For reservations please call 445-7790 or check our website at [www.centralazlandtrust.org](http://www.centralazlandtrust.org).



## 50 Mile Feast

Saturday, August 25, 2012  
5:00 PM  
Chino Valley Farms  
Live Auction  
Tickets Limited  
928-445-7790  
[www.centralazlandtrust.org](http://www.centralazlandtrust.org)

## Save the Date



## Constance Pinney \$5 for the Future Fund



Constance Pinney, a member of the Central Arizona Land Trust advisory board, passed away in December of 2011. Constance was a certified public accountant, an author, speaker and expert witness on business and financial matters, and a contributing member of the community. In addition to serving on CALT's advisory board, she belonged to the 96th Arizona

Town Hall Think Tank of Leaders, Rotary International as treasurer of District 5490, president of the Sunup Rotary Club and president of the Sunup Rotary Foundation.

Constance was a genuine renaissance woman. In addition to her financial skills, she was a poet, guitarist, an equestrienne who owned horses and once rode in a cattle drive, and a member of the Prescott Valley CASA Belles senior dance troupe. Family members, friends and clients will remember her as a petite, genteel, caring lady with sparkling blue eyes and a thousand-volt smile who excelled at everything she did.

In her memory, CALT has launched the “**Constance Pinney \$5 for the Future Fund.**” Constance suggested the slogan with the thought that anyone would be willing to invest a minimum of \$5 towards our future. We are now capable of accepting monthly payments via PayPal. For more information please check the CALT website at [www.centralazlandtrust.org](http://www.centralazlandtrust.org).

*Special thanks to the Prescott Daily Courier for information regarding Ms. Pinney.*

## Policy Update

*Forest Legacy Cut Rejected,  
Ag Easements Improved, Farm Bill Passed*

On June 20th, two resounding wins on amendments demonstrated that conservation remains a bipartisan priority in the Senate. The Senate approved its version of the Farm Bill, providing at least \$1.38 billion over 10 years for Agricultural Land Easements (ALE), a new program that merges the Farm and Ranch Lands Protection Program and Grassland Reserve Program. In a promising sign, there were no amendments to cut ALE funding. The Senate also rejected an attempt to defund the Forest Legacy Program and then unanimously agreed to clarify the federal role in funding land trust purchases of Agricultural Land Easements.

Bills allowing land trusts to hold Forest Legacy easements and to reduce ALE matching funds were not brought to a vote but efforts to keep these issues alive in the House version are underway.

The House version of the Farm bill will be up for Committee vote on July 11. Call and write members of the House Agriculture Committee and urge them to defend the Senate's strong funding levels, and push for amendments the Senate left out. For more information please check the Land Trust Alliance website at <http://www.landtrustalliance.org/>.



## Tamra Kelly Joins the Board

Tamra Kelly is our newest board member, joining the CALT board of directors in spring of 2012. She is a native Arizonan, having spent most of her life in Prescott. Tamra received an A.A. degree in paralegal studies in 1995 followed by a Bachelor's degree in Business Administration in 2004, and her graduate degree in Public Administration with honors in 2009. She is a nationally Certified Legal Assistant through NALA. As an accomplished business manager, Tamra manages a personal investment business, property management business, the Kelly Cattle Company and the Kelly Law Firm.

In addition, she has volunteered in our local community providing her time and resources to legal workshops, New Adventures Day Care Center, and Veteran's Administration Legal Assistance Program. Tamra has also served as adjunct professor, instructing paralegal and business classes at Yavapai Community College.

Tamra enjoys her role as the wife of Tom Kelly and the mother of six children. Actively involved in their lives, Tamra participates in their educational and extracurricular activities. Her hobbies include numerous outdoor activities including mountain biking, running, and scuba diving. Welcome Tammy!

## *Educational Workshops*

*continued from page 1*

Both workshops were considered highly successful with a variety of professionals and local landowners in attendance. Those present indicated that it was a valuable learning experience and requested information regarding further workshops. Look for similar educational workshops in the future.

A portion of the YCCF grant will also be used to build a multimedia presentation centered on land protection tools and land use planning in Yavapai County. This final phase of the grant will be directed towards county and municipal planning staff. For more information please check our website at [www.centralazlandtrust.org](http://www.centralazlandtrust.org).



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# Appraising Conservation Easements

## *Part Two*

*By Gordon Bergthold*

Since 2006, an enhanced tax incentive has allowed family farmers, ranchers, and other moderate-income landowners to get a significant tax benefit for donating a conservation easement on their land. Despite strong support from both parties in Congress, this incentive expired at the end of 2009! We need your help to make it permanent this year.

This is the second in a series of articles pertaining to the appraisal of conservation easements that will be reviewed by the Internal Revenue Service. In recognition of the need to preserve our heritage, Congress has allowed an income tax deduction for owners of significant property who give up certain rights of ownership to preserve their land or buildings for future generations. Because the IRS has seen abuses of this tax provision that compromise the policy Congress intended to promote, I offer some background for you to review before making a decision on where to start in the process.

Taxpayers are often encouraged by promoters, armed with questionable appraisals, to take inappropriately large deductions for easements. In some cases, taxpayers claim deductions when they are not entitled to any deduction at all. In addition, donors of conservation easements have sometimes used or developed these properties in a manner inconsistent with the easement's restrictions. Dealing with a qualified land trust such as Central Arizona Land Trust, one can be assured that the easement restrictions will be adhered to by qualified personnel well versed in the law and regulations.

Let's take the example of a landowner who wishes to donate a conservation easement on ranchland near the outskirts of a fast-growing metropolitan area while retaining some building rights on the land. Prior to entering detailed negotiations related to the terms of the easement, he wants assurances that the donation will meet his minimum goals for a charitable income tax deduction. The question is asked, at what point

should an appraiser become involved? The land trust involved in this case is concerned that involving an appraiser before drafting the easement could lead to the financial goals overshadowing the conservation goals, thus reducing the importance of drafting an easement.

It is my experience that it is never too early to involve the appraiser. Appraisers can and do prepare preliminary appraisals, often to inform landowners of the potential value of a conservation easement on their land. Assuming that the appraiser has a reasonable understanding of what the conservation easement restrictions will be and how they will impact the property, appraisers with appropriate experience can also be useful in identifying potential problems. Examples of typical problems are impaired access, newly adopted or proposed local land use regulations, or early knowledge of potential nearby land uses that would have a negative effect on the value of the subject property.

It is imperative that a qualified appraiser be engaged to do this work. A "qualified appraiser" is an individual that 1) offers himself or herself to the public as an appraiser or performs appraisals on a regular basis; 2) is qualified to make appraisals of the type of property being valued because of his or her qualifications as described in the appraisal; 3) is not an excluded individual (such as the donor or the donor's relative); and 4) understands that an intentionally false overstatement of value of property may subject him or her to the penalty for aiding and abetting an understatement of tax liability.

For more information regarding land trusts, conservation easements and other conservation activity, visit [www.lta.org](http://www.lta.org)

*Gordon Bergthold is a Certified General Real Estate Appraiser licensed in Arizona and California. He resides in Prescott, AZ and is an active member of the CALT Board of Directors.*



From Left: Dan Campbell, Richard Yetman, Mary Hoadley, Judy Clapp, Patricia Bruneau-Gaber, Paul Orme, Gordon Bergthold, Jeanne Trupiano and Becky Ruffner

## CALT Board Member Retreat

### *Working Through the Accreditation Process in a Beautiful Setting*

by Colleen Sorensen

On Saturday, January 7th, 2012, the Central Arizona Land Trust Board of Directors and Staff met at Ann Harrington's Little Thumb Butte Bed and Breakfast in Paulden, Arizona to hold their annual Board of Directors retreat. The group arrived at 8:30am to find tasty muffins and coffee and socialized for a good 30 minutes before getting down to business.

Little Thumb Butte B&B sits at the confluence of the Verde River and Granite Creek, just below its namesake landmark, Little Thumb Butte. The bed and breakfast owns entrances to trails that lead to the Verde River, one of Arizona's Wild and Scenic rivers. The porch sunset view is the mini-canyon which edges the river. With its authentic western feel, Little Thumb Butte B&B also accommodates horse enthusiasts and their animals with a full-sized roping arena, covered stalls, and plenty of parking for trucks and trailers. For more info: <http://www.littlethumb.net>.

To begin the retreat, Judy Clapp, Board President, called the board meeting to order at 9:00am. Most board members and all staff were present. Jeanne Trupiano was also in attendance to speak about the Land Trust Alliance (LTA) accreditation process. Jeanne, who has been a CALT employee in the past, has continued work with the group in an effort to strengthen the board and the organization. With Jeanne's help and funded by the Arizona Community Foundation, the board completed board effectiveness training through the Lodestar Non-Profit Center at Arizona State University in May of 2011. Jeanne has been tasked with reviewing CALT files in preparation for

a guided assessment as part of the LTA accreditation process. Accreditation indicator practices are a sampling of the practices from Land Trust Standards and Practices, the ethical and technical guidelines for the responsible operation of a land trust. Evaluating the indicator practices provides an overview of the current operation of a land trust and indicates whether or not the land trust operates in an ethical, legal, and technically sound manner and ensures the long-term protection of land in the public interest. CALT hopes to complete the accreditation process by early 2013. Jeanne's knowledge and assistance in this process is greatly appreciated by the CALT Board and staff. Also discussed before lunch were CALT fundraising plans and the Yavapai County Community Foundation funded land protection workshops that took place in April and May of 2012.

At 1:15pm, Dan Campbell, then manager of the Nature Conservancy's Verde River Program, lead the board on a hike to the Verde River Headwaters. The group benefited from Dan's extensive Verde River knowledge as he spoke of the vast variety of natural resources in the area. Dan explained that the Verde River is a critical flyway for migratory birds and home to nesting bald eagles, rare species of reptiles and amphibians, and many species of native fish. Dan led the group to an area that is home to a family of beavers and explained that beavers are the "homesteaders" in a new area. Beavers may be the first to move into reforested areas and in building their dams, to provide still, deep water protecting against predators, also creating habitat which allows fish and river otters to enter the area. To see a short video on this topic please go to: <http://www.nature.org/ourinitiatives/regions/northamerica/unitedstates/arizona/placesweprotect/verde-river.xml>. The retreat was a day full of productive learning, brainstorming, and education and was enjoyed by all. We look forward to our next retreat!

Update - CALT was awarded a grant by the Nina Mason Pulliam Charitable Trust to help cover the cost of a Guided Assessment, a first step in the Land Trust Alliance Accreditation process.

# Donors Make It Happen

## *Donor Acknowledgements*

### **TOP HANDS**

Wesley DeBusk  
Judy Clapp  
Jane Cook  
Barbara Indra  
Paul Orme

### **PARTNERS IN PROTECTION**

Dan and Sue Boyce  
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Kristin Woolever

\*\*\*Top Hands \$250 and above

\*\* Partners in Protection \$100-\$249

\* Land Lovers \$10-\$99

## Wish List



### **Office Supplies and Equipment**

Projector screen  
Paper, pens and printer ink are always welcome.

### **Books for Central Arizona Land Trust Lending Library**

\$25 will buy 5 copies of *Conservation Options: A Landowner's Guide*

\$50 will buy 1 set of

*Preserving Family Lands: Book I –*

*Essential Tax Strategies for the Landowner*

*Preserving Family Lands: Book II –*

*More Strategies for the Future*

*Preserving Family Lands: Book III –*

*New Tax Rules and Strategies and a Checklist*

\$100 will buy 3 copies of *Saving the Ranch:*

*Conservation Easement Design in the West*

### **Volunteers**

Do you have a few hours a month to help with light clerical work, grantwriting, event planning, and public relations? Call (928) 445-7790.

Please remember that CALT, as a 501 (c) (3) charitable organization can accept donations of all types of assets. See the CALT website for more information on gifts and planned giving options on the comparison chart. Additionally, CALT can accept donations of land that may not be appropriate for a conservation easement, but can be re-sold to benefit our general expenses, programs, and land preservation efforts. Please call our office for more information at (928) 445-7790.

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Thumb Butte



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Payne - Granite Dells



W Diamond Ranch

CENTRAL ARIZONA



LAND TRUST

*Preserving Open Space in the Heart of Arizona*

## Become a Partner in Protection

The Central Arizona Land Trust is dependent on your continued support to the mission of preserving and protecting open space throughout Central Arizona.

*Join today by mail with  
the enclosed membership  
envelope or:*

Please remember CALT for charitable gifts or estate planning. Your gift works directly to benefit land preservation this year and into the future. As a qualified 501(c)(3) gifts to the Central Arizona Land Trust are tax deductible. Please visit the CALT website to explore options for donations and planned giving.

*Online at  
[www.centralazlandtrust.org](http://www.centralazlandtrust.org)*

*Preserving Western Lands Since 1989. All donations are tax deductible.*

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