

Conservation Planning for Complex Agricultural Properties

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- 1) Why land planning is needed
 - a) Help landowner better understand land's potential
 - b) Resolve conflicts over future of property
 - c) Help landowner realize long-term financial and management objectives for land
 - d) Inter-generational transfers, understand conservation strategies that may help with tax planning

- 2) Land Planning Process
 - a) Understand the Owner's Goals and Objectives
 - b) Analyze present use, conservation values and potential for funding, development pressures, value components
 - c) Develop land use alternatives based and strategies based on goals/objectives
 - d) Financial and legal review of alternatives
 - e) Landowner decides on preferred alternative and strategy
 - f) Implement preferred alternative

- 3) Conservation Strategies
 - a) Fee sale of all or a portion of landholding to conservation organization or public agency
 - b) Conservation Easements
 - c) Limited or conservation development
 - d) Sale to conservation buyer
 - e) Donation with reserved life estate

- 4) Conservation Easements
 - a) What are they?
 - b) Who holds conservation easements?
 - c) Before and After Appraisal Process
 - d) Vineyard and other value considerations in conservation easement appraisals
 - e) Donated vs. purchased easements, and hybrid
 - f) Sources of funding conservation easement purchases
 - g) Where are they being purchased?

- 5) Case Studies