

**Alaska Sustainable Salmon Fund
Statement of Work**

*Revision #1: Extend project period to 11/30/16; change PI; update SOW;
eliminate ADF&G budget*

I. Project Title: Strategic Conservation of Important Salmon Habitat in Southcentral Alaska – Phase 2

II. Project Number: 44806 **PCSRF Objective:** HP&R

III. Principal Investigator

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IV. Amended Project Period: 4/1/13 - 11/30/16

V. Project Description

1. Synopsis (updated with *Revision #1*)

This project will permanently conserve priority salmon habitat in Southcentral Alaska along with one parcel on Afognak Island. Using the salmon habitat prioritization completed in 2012, Great Land Trust (GLT) will work with seven or more landowners to secure permanent conservation easements or acquire fee-simple titles on lands containing important migration, spawning, rearing, and overwintering habitat. These protection methods will conserve up to 600 acres of critical habitat for Chinook (*Oncorhynchus tshawytscha*), coho (*O. kisutch*), sockeye (*O. nerka*), chum (*O. keta*), and pink salmon (*O. gorbuscha*), as well as steelhead (*Oncorhynchus mykiss*) populations. *See related AKSSF projects 44513, 44712, and 44159.*

2. Introduction

An outreach and education grant (funded through AKSSF project 45978) awarded to GLT in 2011 provided funding to prioritize specific drainages in the Matanuska-Susitna Borough (MSB) and identify the top 200 land parcels containing critical salmon habitat. To complete the prioritization process, GLT worked in partnership with the U.S. Fish and Wildlife Service (USFWS), the Alaska Department of Fish and Game (ADF&G), the Environmental Protection Agency (EPA), the U.S. Geological

Survey (USGS), Native organizations, MSB employees, conservation partners, and aquatic research firms. AKSSF project 44712 (Phase 1) provided funding to work with landowners to complete several conservation projects identified with the outreach and education grant.

This project (Phase 2) will secure conservation easements or obtain fee-simple titles to seven parcels identified in the 2012 salmon habitat prioritization. GLT will monitor and enforce the easements in perpetuity to ensure that the conservation values are not negatively impacted or degraded by human alteration. Acquisition projects will be transferred into public ownership with a municipal or state entity and managed as part of an existing refuge or protected area. In some cases, GLT will retain a conservation easement on lands that are granted to a public entity.

Specific project activities include the following:

- Determine the best seven projects for AKSSF funding identified in the outreach and education grant
- Follow-up with the seven landowners
- Complete the GLT Board approval process
- Obtain signed engagement letters from each landowner
- Meet with landowners to negotiate and draft conservation easements or acquisition documents
- Perform due diligence activities; manage contractors on seven or more projects
- Close on seven or more conservation easements or acquisitions; publish a special newsletter highlighting salmon conservation in Southcentral Alaska

3. Location

Site: GLT Palmer office

Latitude: 61.600703 N

Longitude: 149.114767 W

4. AKSSF Objective

1A-7

VI. Objectives

1. Project Objectives

GLT will work with seven private landowners in Southcentral Alaska (and one landowner on Afognak Island) to place conservation easements on, or acquire titles to, approximately 600 acres of land containing important salmon habitat primarily in Southcentral Alaska to permanently protect these areas from future potential impacts caused by increasing residential, commercial, and industrial development.

2. Methods

- A. GLT will follow up with landowners who have expressed interest in completing a conservation project on their property, determine the best projects for this funding, and obtain engagement letters from each landowner.
- B. GLT will meet with landowners to negotiate and draft conservation easements or acquisitions, manage each project, manage contractors, and begin collecting information for a Baseline Documentation Report for each project/parcel.

- C. GLT and contractors will perform due diligence activities for each project as follows:
- Title search: complete a title report to ensure that there are no complications with the title of the property
 - Survey: complete a survey of the property, as necessary
 - Environmental Hazard Assessment Phase I report: ensure that there are no environmental contaminants or hazardous materials on the property
 - Appraisal: hire a qualified appraiser to complete an appraisal to determine property or easement value
 - Legal review: work with attorneys to review the conservation easement
 - Negotiations: negotiate the terms of the easement or purchase agreement with the landowners
- D. Once due diligence is completed and the easement is drafted, GLT will draft a Baseline Documentation Report describing in detail the condition of the property at the time the conservation easement is conveyed. The report will document historical and current uses and each of the conservation values being preserved with the easement. The report will serve as a snapshot of the property at the time the easement was conveyed and will allow GLT to determine, at annual monitoring site visits, whether there have been any violations to the terms of the easement.
- E. GLT will identify the cost of the conservation easement or acquisition necessary to place private lands in conservation. These stewardship funds cover staff time and expenses related to annual monitoring of the property as well as possible legal costs associated with defending the terms of the easement. GLT has developed a formula that calculates the required amount based on a number of factors related to the easement including the number of reserved rights and the property location.
- F. GLT will close on seven or more conservation easements or acquisitions totaling approximately 600 acres and will publish a special newsletter highlighting salmon conservation in the MSB. Conservation easements will be recorded at the State Recorder's office.

VII. Benefits

Permanently conserving the most important lands and waterways in the project area will protect critical migration, spawning, rearing, and overwintering habitat for Chinook, coho, sockeye, chum, and pink salmon as well as steelhead. This project will directly build upon local, state, and federal habitat conservation planning efforts to help ensure sustainable salmon populations in Southcentral Alaska.

VIII. Products, Milestones, and Timelines (Updated with *Revision #1*)

April 2013 – December 2014:

- Determine the specific projects to be funded
- Contact landowners; obtain signed willingness statements/engagement letters to move forward with projects
- Complete budgets for each project

January 2015 – April 2016:

- Complete title reports

- Complete environmental hazard reports
- Draft conservation easements
- Complete appraisals; identify the match value for each project
- Compile Baseline Documentation Reports for each project

April 2016 – September 2016:

- Close on conservation easements or acquire fee simple titles; record at the State Recorder’s Office
- Publish a GLT newsletter highlighting the parcels conserved with AKSSF funds

IX. Budget

Revision #1 eliminates the ADF&G budget and updates GLT’s line 100 budget narrative detail.

GLT Budget (Unchanged with *Revision #1*)

GLT	Total
100 Personnel	\$98,000
200 Travel	\$0
300 Contractual	\$143,500
400 Supplies	\$0
500 Capital Expenditures	\$350,000
Total	\$591,500

GLT Budget Narrative (Updated with *Revision #1*):

Line 100: Personnel (\$98,000; *updated with Revision #1*)

The GLT Executive Director, Conservation Director, Conservation Project Manager, Lands Manager, and the Mat-Su Program Director will be responsible for completing the objectives and deliverables of this project. They will supervise contractors for the appraisal, legal review, land survey, and title reports; engage landowners and work with them to draft the conservation easements; coordinate with state or municipal entities on acquisition projects; complete the Baseline Documentation Report for each project; and perform all other project requirements. GLT salary calculations include fringe benefits.

Phil Shephard, Executive Director, will oversee and manage the budget and staff in relation to the project: 200 hours @ \$70/hour = \$14,000.

Dave Mitchell, Conservation Director, will perform all conservation easement and acquisition negotiations, and approve all the due diligence documentation: 500 hours @ \$47/hour = \$23,500.

Kim Sollien, Mat-Su Program Director, will contact potential landowners and explain the conservation options available, and present projects to the Conservation Director: 668 hours @ \$44/hour = \$29,400.

Austin Quinn-Davidson, Conservation Project Manager, will supervise all contractors for due diligence, draft the conservation easement and purchase and sale agreements, and provide project support to the Conservation Director and Mat-Su Program Director: 406.82 hours @ \$44/hour = \$17,900.

Amanda Peacock Hults, Lands Manager, will be responsible for project-related GIS mapping and will perform the initial fieldwork and baseline documentation reporting necessary for each project: 300 hours @ \$44/hour = \$13,200.

Line 300: Contractual (\$143,500; unchanged with **Revision #1**)

- Title reports: 7 reports @ \$1,500/report = \$10,500
- Environmental Hazard Assessment Phase 1 Reports: 7 reports @ \$3,000/report = \$21,000
- Real estate appraisals: 7 appraisals @ \$7,000 = \$49,000
- Land surveys: 7 surveys @ \$7,000/survey = \$49,000
- Attorney consultations to review the conservation easement drafts: 7 legal consultations @ \$2,000/consultation = \$14,000

Line 500: Capital Expenditures (\$350,000; unchanged with **Revision #1**)

- Acquisition costs, not to exceed appraised value, for the purchase of development rights, conservation easements, or parcels required to conserve the habitat: \$350,000

X. Match Budget

Revision #1 makes no change to project match by line item or in total, but does update GLT's line 100 match budget narrative detail.

GLT (35%)	Total
100 Personnel	\$12,025
200 Travel	\$0
300 Contractual	\$0
400 Supplies	\$0
500 Capital Expenditures	\$195,000
Total	\$207,025

GLT Match Budget Narrative (Updated with **Revision #1**):

Line 100: Personnel (\$12,025; updated with **Revision #1**)

The GLT Executive Director, Conservation Director, and the Mat-Su Program Director will be responsible for completing the objectives and deliverables of this project. They will supervise contractors for the appraisal, legal review, land survey, and title reports; engage landowners and work with them to draft the conservation easement; coordinate with state or municipal entities on acquisition projects; complete the Baseline Documentation Report for each project; and perform all other necessary project work. A

portion of these project activities will be performed as match with non-federal funding secured from private sources:

- Phil Shephard, Executive Director: 20 hours @ \$70/hour = \$1,400
- Dave Mitchell, Conservation Director: 57.55 hours @ \$47/hour = \$2,705
- Kim Sollien, Mat-Su Program Director: 90 hours @ \$44/hour = \$3,960
- Austin Quinn-Davidson, Conservation Project Manager: 50 hours @ 44 hour= \$2,200
- Amanda P Hults Lands Manager: 40 hours @ 44/hours = \$1,760

Line 500: Capital Expenditures (\$195,000; (unchanged with **Revision #1**)

GLT will provide a combination of in-kind and cash match. The in-kind value of donated conservation easements will be determined by professional appraisal. The easement value is determined by subtracting the parcel value without the easement from the parcel value with the easement. GLT will also secure non-federal matching funds for a portion of the acquisition costs of conservations easements or fee-title costs.