

**Alaska Sustainable Salmon Fund
Statement of Work**

Revision #1: Extend end date to 10/31/18; remove Co-PI

I. Project Title: Strategic Conservation of Important Salmon Habitat in Southcentral Alaska - Phase 3

II. Project Number: 44159

III. Principal Investigator
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IV. Project Period: 3/1/15 – 10/31/18

V. AKSSF Objective: 1A-7 **PCSRF Objective:** HP&R

VI. Project Description

1. Synopsis
This project will permanently conserve approximately 500 acres of priority salmon habitat in Southcentral Alaska. Great Land Trust (GLT) will work with five or more landowners to secure permanent conservation easements or acquire fee-simple titles on lands containing important salmon migration, spawning, rearing, and overwintering habitat. If needed, this project will also perform shoreline restoration

or invasive species removal on damaged parcels. *See related AKSSF projects 44513, 44712, and 44806.*

2. Introduction

Using its Geographic Information System (GIS)-based Salmon Habitat Parcel Prioritization plan, GLT will protect its five highest priority parcels for the conservation of Chinook (*Oncorhynchus tshawytscha*), coho (*O. kisutch*), sockeye (*O. nerka*), chum (*O. keta*), and/or pink salmon (*O. gorbuscha*) habitat and, if necessary, restore degraded shoreline habitat and/or remove invasive species on those properties. Lands experiencing the most pressure from population growth and development will be targeted.

The conservation easements will be acquired via donation or by purchase, and GLT will monitor and enforce the easements in perpetuity to ensure that the salmon habitat is not impacted or degraded by human alteration. Acquisition projects will be purchased from willing landowners, 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.

For those parcels that require restoration or invasive species mitigation, GLT will work with the Alaska Department of Fish and Game (ADF&G) to develop a habitat restoration plan. GLT will also provide the landowners with information on alternative methods, programs, and cost-share options they can access to support water quality and salmon habitat on their property.

3. Location

Site: GLT Palmer office

Latitude: 61.600703 N Longitude: 149.114767 W

VII. Objectives

1. Acquire conservation easements or title to 500 or more acres of priority salmon habitat
2. If needed, remove invasive species from, and/or restore, 100 or more feet of degraded shoreline on project parcels

VIII. Methods

As described in more detail below, GLT will select the five best projects from the 100 highest scoring parcels in GLT's Salmon Habitat Parcel Prioritization plan. Final project selection will depend on landowner interest and willingness. Once GLT and the landowners have agreed to work together on a conservation project, GLT will complete site assessments of each property to further document the conservation value and feasibility of the project. After the site assessment, GLT will present each proposed project to the GLT Board of Directors for approval. When the GLT board approves a project, GLT staff will begin performing due diligence. Due diligence activities include, at minimum, a title review, Environmental Hazard Assessment Phase 1 report, appraisal, and survey, as described below. GLT staff will work with the landowners to draft a conservation easement specific to each individual project. This often involves legal

review by independent counsel and extensive meetings with landowners over many months.

If a project is an acquisition, many of the due diligence steps are similar. However, GLT will only acquire a parcel if there is a willing municipal or state partner able to assume ownership and management authority over the property that has the resources to manage the land for conservation purposes. If GLT has a willing partner and can come to an agreement on management intent, GLT will purchase the property. In some instances GLT will also retain a conservation easement on a fee title property.

Detailed activities to accomplish project objectives are described below:

- Perform a secondary follow-up with the top 100 landowners identified in the GLT Salmon Habitat Prioritization to assess interest in land conservation
- Determine the five best projects for AKSSF funding
- 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
- Complete the GLT Board approval process including site visit, habitat assessment, conservation value documentation, and draft project budget
- Obtain signed engagement letters from each landowner
- Perform the following due diligence:
 - a. Title search: Complete a title report to ensure that there are no complications with the title of the property
 - b. Survey: If necessary, complete a survey of the property to accurately document the legal boundaries of the easement
 - c. Environmental Hazard Assessment Phase I Report: Complete a Phase I Report to ensure that there are no environmental contaminants or hazardous materials on the property
 - d. Habitat Assessment Survey: Work with ADF&G and/or the U.S. Fish and Wildlife Service to assess the integrity of the shoreline habitat and look for invasive species
 - e. Appraisal: Hire a qualified appraiser to complete an appraisal to determine property or easement value
 - f. Legal review: Work with attorneys to review the conservation easement
- Once due diligence is completed and the easement is drafted, GLT will draft a Baseline Documentation Report for each project describing in detail the condition of the property at the time the conservation easement is conveyed. The report documents the 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, at annual monitoring site visits, to determine if there have been any violations to the terms of the easement.
- GLT will complete any restoration activities in partnership with ADF&G and contractors.
- 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 in perpetuity as well as possible legal costs associated with defending the terms of the easement. GLT has developed a formula that calculates the amount of the fund based on a number of factors related to the easement including the number of reserved rights and property location.

- GLT will close on four to five conservation easements or acquisitions and publish a special newsletter highlighting salmon conservation in Southcentral Alaska.
- GLT will monitor each conservation easement annually to ensure that conservation values and salmon habitat remain protected. During these visits, GLT will also look for invasive species and assess how restoration activities are holding up. If further restoration is needed, GLT will work with the landowner or land manager to complete the restoration.

IX. Benefits

This project will permanently conserve important spawning, rearing, and migration habitat for Chinook, coho, sockeye, chum, and/or pink salmon and steelhead populations in Southcentral Alaska through conservation easements and/or fee simple acquisition. In addition, GLT will remove invasive species and restore any degraded habitat on conservation project lands.

X. Products, Milestones, and Timelines *Updated with Revision #1*

April 2015 – December 2015:

- Determine the top five projects out of the top 100 parcels GLT identified in the GLT Salmon Habitat Prioritization
- Contact landowners
- Obtain owner willingness statements/engagement letters
- Complete initial site and habitat assessment to determine conservation value and restoration needs
- Prepare budgets for each project and identify funding sources for additional acquisition funds, if needed
- Obtain GLT Board approval to move forward

January 2016 – December 2016:

- Complete title reports
- Complete environmental hazard reports
- Draft conservation easements
- Complete appraisal and identify the match value for each project
- Complete baseline documentation report for each project
- Complete conservation easements or acquisition negotiations
- Complete any necessary restoration activities

January 2017 – October 2018:

- Close on four to five conservation easements or acquire fee simple title
- Publish a GLT newsletter highlighting the parcels conserved with AKSSF funds
- Complete and submit AKSSF final report

XI. Budget

GLT Budget	Total
100 Personnel	\$75,000
200 Travel	\$0
300 Contractual	\$108,500
400 Supplies	\$0
500 Capital Expenditures	\$400,000
Total	\$583,500

GLT Budget Narrative:

Line 100: Personnel (\$75,000)

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 the contractors for the appraisal, legal review, land survey, title reports, and restoration activities; secure and track matching funds; engage landowners and work with them to draft the conservation easements; coordinate with state or municipal entities on acquisition projects; complete the baseline report for each project; and perform all the necessary reporting requirements for the grant.

- Phil Shephard, Executive Director, will oversee and manage the budget and staff in relation to the project: 208 hours @ \$67/hour = \$13,936.
- Dave Mitchell, Conservation Director, will perform all conservation easement and acquisition negotiations and approve all the due diligence documentation: 416 hours @ \$45/hour = \$18,720.
- Kim Sollien, Mat-Su Program Director, will contact potential landowners, explain the conservation options available, and present projects to the Conservation Director: 457.5 hours @ \$38/hour = \$17,384.
- 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: 416 hours @ \$40/hour = \$16,640.
- 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: 208 hours @ \$40/hour = \$8,320.

Line 300: Contractual (\$108,500)

- Title insurance reports and closing costs: 5 reports @ \$1,500/report = \$7,500
- Environmental Hazard Assessment Phase 1 Reports: 5 reports @ \$3,000/report = \$15,000
- Real estate appraisals: 2 appraisals @ \$7,000/appraisal = \$14,000

- Land surveys: 5 surveys @ \$7,000/survey = \$35,000
- Attorney consultations to review the conservation easement drafts: 5 legal consultations @ \$2,000/consultation = \$10,000
- Contract for restoration measures including shoreline vegetation materials, root wad placement, willow cutting plantings, and invasive species removal: \$27,000

Line 500: Capital Expenditures (\$400,000)

- Acquisition costs (not to exceed appraised value) for the purchase of development rights, conservation easements, or parcels required to conserve salmon habitat: \$400,000

XII. Match Budget

Great Land Trust Match	Total
100 Personnel	\$0
200 Travel	\$0
300 Contractual	\$204,225
400 Supplies	\$0
500 Equipment	\$0
Total	\$204,225

GLT Match Budget Narrative:

Line 500: Capital Expenditures (\$204,225)

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, 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 conservation easements or fee-title costs.