

## **Alaska Sustainable Salmon Fund Statement of Work**

**I. Project Title:** Strategic Conservation of Priority Salmon Habitat in Southcentral Alaska - Phase 4

**II. Project Number:** 44202

**III. Principal Investigator**

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**IV. Project Period:** 3/1/16 - 11/30/18

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

**VI. Project Description**

1. Synopsis

This project will result in the permanent conservation of 500 acres or more of important salmon habitat in Southcentral Alaska. Using its Geographic Information System (GIS) based prioritizations, Great Land Trust (GLT) will identify high value salmon habitat and work with willing landowners to develop conservation easements or acquire fee-simple title to critical spawning, rearing, and migration habitat for Chinook (*Oncorhynchus tshawytscha*), coho (*O. kisutch*), sockeye (*O. nerka*), chum (*O. keta*), and pink salmon (*O. gorbuscha*) populations.

## 2. Introduction

### **Purpose**

This project builds upon four prior AKSSF grants awarded to GLT to conserve important salmon habitat in the Central Region (AKSSF projects 44513, 44712, 44806, and 44159). With prior AKSSF grants, GLT has been able to conserve over 2,000 acres of important salmon habitat including: the 170-acre Montgomery easement that feeds Bartko Slough, a clearwater side channel on the Matanuska River important for all five species of Pacific Salmon; the 30-acre O'Brien Creek Estuary easement that contains the mouth of O'Brien creek in Upper Knik Arm important for coho salmon and Cook Inlet beluga whales; the 976-acre Turner Acquisition including portions of the Wasilla and Spring Creek wetland complex and almost three miles of Wasilla Creek important for all five species of salmon within Palmer Hay Flats State Game Refuge; the 800-acre Mud Lake Conservation Easement containing the entire shoreline of Mud Lake and important spawning areas for sockeye salmon and wintering habitat for coho, chum, and sockeye salmon; and the 80-acre Phalarope Springs easement that protects the headwaters of Question Creek and a large wetland complex important for Chinook and coho salmon.

### **Activities**

The conservation easements will be granted 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. If a violation occurs and the conservation values of the property are impacted, GLT will work with the landowners to mitigate or pursue litigation to amend the violation and restore the habitat values.

Acquisitions will be purchased from willing sellers, 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.

### **Targeting Priority Habitat**

Using GIS, GLT developed a digitized ecological data and ranking system to identify lands by parcel according to relative value to fisheries. Using ArcGIS and the best available data, the prioritization of riparian lands was conducted with a focus on 35 water bodies in the Matanuska-Susitna Borough (MSB). The water bodies were selected during a series of meetings with local fisheries experts from the Mat-Su Basin Salmon Habitat Partnership Steering Committee, the MSB, the Environmental Protection Agency, the U.S. Fish and Wildlife Service, the Alaska Department of Fish and Game's Palmer office, the U.S. Geologic Survey, local fishing guides, tribal

governments, and The Nature Conservancy. Below is a list of the priority systems identified by our partners.

Central Portion of Mat-Su Watersheds	Susitna Drainage Watersheds	Eastern portion of Mat-Su Watersheds
Big Lake	Cache Creek	Wasilla Creek
Blodgett Lake	Goose Creek	Jim Creek
Cottonwood Creek	Lake Creek	Jim Lake
Fish Creek	Larson Lake	Matanuska River clearwater side channels
Goose Creek	Montana Creek	McRoberts Creek
Herkimer Lake	Queer Creek	Mud Lake
Horseshoe Lake	Rabideaux Creek	Swan Lake
Little Meadow Creek	Sawyer (Buddy) Creek	Swift Creek
Little Susitna River	Sheep Creek	
Lucile Creek	Sunshine Creek	
Meadow Creek	Susitna River channel, sloughs, & clearwater side channels	
	Trapper Creek	
	Twister Creek	
	Whiskers Creek	
	Wiggle Creek	
	Willow Creek	

Priority water bodies in the MSB assessed in the prioritization

Once the water bodies were selected, GLT applied a number of filters to limit the parcel numbers to be analyzed. Using the MSB's Parcel Polygons shapefile, GLT selected all private, Native Corporation, Mental Health Trust, Public University, and Borough owned lands greater than five acres within the 300-foot riparian buffer along each of the 35 priority water bodies. State and federal lands within the prioritization area were excluded because it is unlikely that they would be interested in doing a conservation project. Once the lands were identified, GLT applied the prioritization criteria in the table below. Each of 1,922 parcels was given a score based on the presence or absence, or the extent, of a particular criterion. All parcels received scores from 1-9.

Prioritization Criteria	Score
1. Development vulnerability	0-1
2. Salmonid species diversity by subwatershed	0-1
3. Anadromous stock of concern	0/0.5/1
4. Sport fisheries	0/1
5. Normalized area of wetlands	0-1

6. Adjacency to protected lands	0/1
7. Normalized stream length	0-1
8. Normalized shore length	0-1
9. Adjacency to additional landowners	0/0.5/1

Prioritization summary of scoring for all criteria

### Maps

Prioritization results are displayed in the maps in Appendix A. These maps highlight all the identified parcels in the study area. Parcels are shaded by score from darker red (higher scoring) to white (lower scoring). GLT will focus outreach efforts on the top 100 high scoring parcels within this prioritization. Given past experience, GLT expects 10% to 20% of prospective landowner to be interested in conservation options.

### Targeted Outreach

In September 2014, with funding support from the Gordon and Betty Moore Foundation, GLT sent information packets to 1,200 private landowners identified in the salmon habitat prioritization. The packets included an introduction letter letting the landowner know that they own important salmon habitat as well as GLT’s “Living Next to a Salmon Stream” brochure and a brochure detailing how GLT prioritizes lands for conservation. The goal with this outreach initiative was to help private landowners understand the value of the land they own in regards to salmon, provide them with resources to be better stewards of the habitat they own, and to introduce them to GLT’s land conservation options.

To the top 100 landowners, GLT mailed a similar information packet and included information about grant funds that GLT has available to help conserve important salmon habitat. A few weeks after the mailing, GLT hosted a landowner reception in Palmer and gave a presentation on how GLT conserves land, the resources we have available to private landowners, and our current priorities. About 25 landowners attended and three of the landowners were interested in doing a project.

The response to both packets was substantial. GLT received immediate phone calls from landowners interested in talking about land conservation options for their family lands. GLT also received calls from landowners interested in telling us how they have already been taking care of the salmon habitat on their property and that they appreciated our outreach efforts.

## **Locations**

Project locations will be focused on lands in the MSB, though priority projects may also be identified in the Municipality of Anchorage, areas of Prince William Sound, or western Cook Inlet based on GLT's service area and AKSSF's Central Region designation. If a project is to be developed outside the MSB, GLT will consult with AKSSF program staff to determine the project's eligibility. Please see the project location map in Appendix A.

### 3. Location

Knik Arm: Latitude: 61.496161 Longitude: -149.606844

### 4. Related Projects

44513, 44712, 44806, 44159

## **VII. Objectives**

Protect 500 acres or more of priority salmon habitat through conservation easements and/or fee simple acquisitions

## **VIII. Methods**

GLT will select the best projects out of the highest scoring parcels. Final project selection will be based on interested and willing landowners. Once the landowners have agreed to pursue a project, GLT will complete site assessments of each property to further document the conservation value and feasibility of the project. Once the site assessment is complete, each project will be presented to GLT's Board of Directors for approval.

### *Conservation Easements*

After the GLT board approves a conservation easement project, GLT staff will begin working on due diligence; if necessary, additional fundraising will be performed to complete the project. Due diligence activities include, at minimum, a title review, environmental hazard assessment, appraisal, and survey. Once all of the due diligence checks out, GLT staff will begin working with the landowners to draft the conservation easement. This often involves legal review by independent counsel and extensive meetings over many months with the landowners.

Once the due diligence is completed and the easement is drafted, GLT staff will draft a Baseline Documentation Report for each project that describes in detail the condition of the property at the time the conservation easement is conveyed. This report documents the historical and current uses of the property and summarizes each of the conservation values being preserved with the easement. The report serves as a legal document that is a snapshot of the property at the time the easement is conveyed and will signal to GLT at annual monitoring site visits if there has been a violation to the terms of the easement.

### *Acquisitions*

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 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. As an example, GLT has worked for many years to purchase properties within and

adjacent to Palmer Hay Flats State Game Refuge and transferred the parcels to the state. GLT has also purchased lands for greenbelts, parks, and open space for the Municipality of Anchorage.

Detailed project activities are listed below:

- Complete a secondary follow-up with the top landowners identified in GLT's salmon habitat prioritization to assess who might be interested in working with GLT to conserve their lands
- Determine the best projects based on available funding (GLT will identify more projects than can be completed with funding from this project because some projects will fall through)
- Complete the GLT Board approval process for each parcel including site visits, habitat assessments, conservation value documentation, and project budget drafting
- Get signed engagement letters from each landowner
- Complete due diligence for each project including the following activities:
  - a. Title search: Complete a title report to ensure that there are no complications with the title of the property
  - b. Property Boundary 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. Appraisal: Hire a qualified appraiser to complete an appraisal to determine property or easement value
  - e. Legal review: Work with attorneys to review the conservation easement to ensure the language is defensible
  - f. Baseline Documentation Report: Draft a Baseline Documentation Report for each project describing in detail the condition of the property at the time the conservation easement is conveyed
- Negotiate the terms of the easement or purchase agreement with the landowners
- Raise additional funds, if necessary, for GLT to complete the project
- Identify and secure match requirements for the conservation easement or acquisition costs necessary for private landowners to place their lands in conservation
- Identify the cost of the stewardship funds necessary to 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)
- Close on conservation easement or acquisition projects and publish a special newsletter highlighting salmon conservation in the Central Region.

## **IX. Benefits**

This project will permanently conserve via conservation easement or fee simple acquisition 500 acres or more of critical spawning, rearing, and migration habitat for Chinook, coho, sockeye, chum, and pink salmon, as well as steelhead.

## **X. Products, Milestones, and Timelines**

### **April 2016 – December 2016:**

- Determine specific projects to pursue based on landowner interest and funding using GLT’s salmon habitat prioritization
- Contact landowners
- Have owners sign willingness statements/engagement letters to move forward with projects
- Complete initial site and habitat assessments to determine conservation value and restoration needs
- Complete budgets for each project and identify funding sources for stewardship funds and any additional acquisition funds needed
- Get GLT Board approval to move forward

### **January 2017 – December 2017:**

- Complete title reports
- Complete environmental hazard reports
- Draft conservation easements
- Complete appraisals and identify the match value for each project
- Complete baseline documentation report for each project
- Obtain commitment from private funders for stewardship funds for each project
- Complete conservation easements or acquisition negotiations

### **January 2018 – October 2018:**

- Close on conservation easements or acquire fee simple titles
- Complete Baseline Documentation Reports
- Publish a GLT newsletter highlighting the parcels conserved with AKSSF funds

## **XI. Budget**

<b>Great Land Trust</b>	<b>Total</b>
100 Personnel	\$95,580
200 Travel	\$0
300 Contractual	\$68,000
400 Supplies	\$0
500 Equipment/Real Property	\$682,500
Total	\$846,080

### **GLT Budget Narrative:**

#### **Line 100: Personnel (\$95,580)**

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 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: 200 hours @ \$70/hour = \$14,000 (including fringe).
- 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 (including fringe).
- Kim Sollien, Mat-Su Program Director, will contact potential landowners, explain the conservation options available, and present projects to the Conservation Director: 600 hours @ \$44/hour = \$26,400 (including fringe).
- 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: 420 hours @ \$44/hour = \$18,480 (including fringe).
- 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 (including fringe).

Line 300: Contractual (\$68,000)

- Title insurance reports and closing costs: 4 reports @ \$1,500/report = \$6,000
- Environmental Hazard Assessment Phase 1 Reports: 4 reports @ \$3,000/report = \$12,000
- Real estate appraisals: 4 appraisals @ \$7,000/appraisal = \$28,000
- Land surveys: 2 surveys @ \$7,000/survey = \$14,000
- Attorney consultations to review the conservation easement drafts: 4 legal consultations @ \$2,000/consultation = \$8,000

Line 500: Equipment/Real Property (\$682,500)

Acquisition costs (not to exceed appraised value) for the purchase of development rights, conservation easements, or fee title: \$682,500

**XII. Match Budget**

<b>Great Land Trust Match</b>	<b>Total</b>
100 Personnel	\$0
200 Travel	\$0
300 Contractual	\$0
400 Supplies	\$0
500 Equipment/Real Property	\$296,128
<b>Total</b>	<b>\$296,128</b>

GLT Match Budget Narrative:

Line 500: Equipment/Real Property (\$296,128)

GLT will provide a combination of in-kind and cash match. The in-kind value of donated conservation easements and/or bargain sale for acquisitions 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; the bargain sale value is determined by subtracting the purchase price of the parcel from the parcel value. GLT will also secure non-federal matching funds for a portion of the acquisition of conservation easements or fee-title costs from private foundations and individual donations.

# Appendix A: Maps



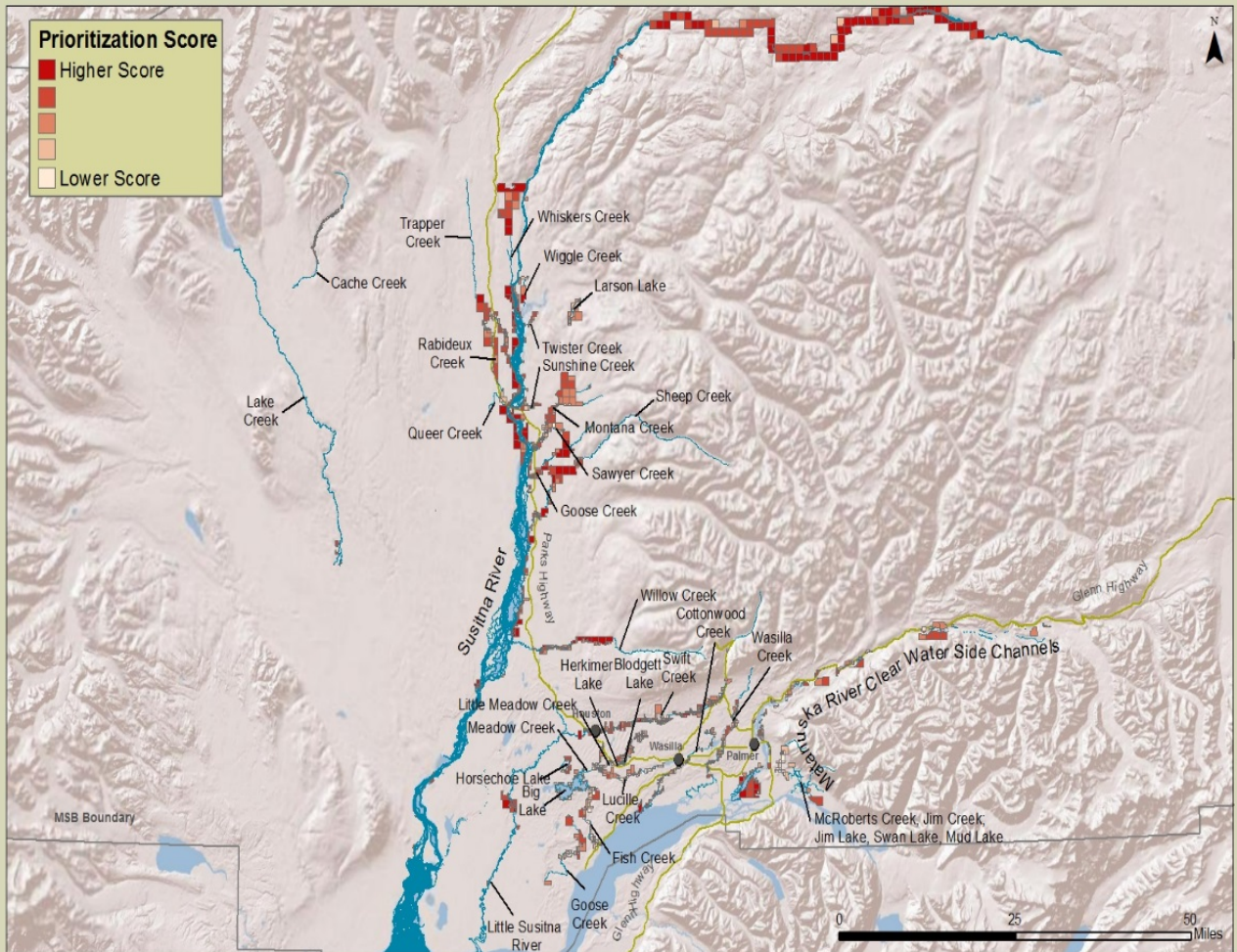
Project location map (GLT service area)

# MAT-SU SALMON HABITAT PRIORITIZATION

## SCENARIO 1

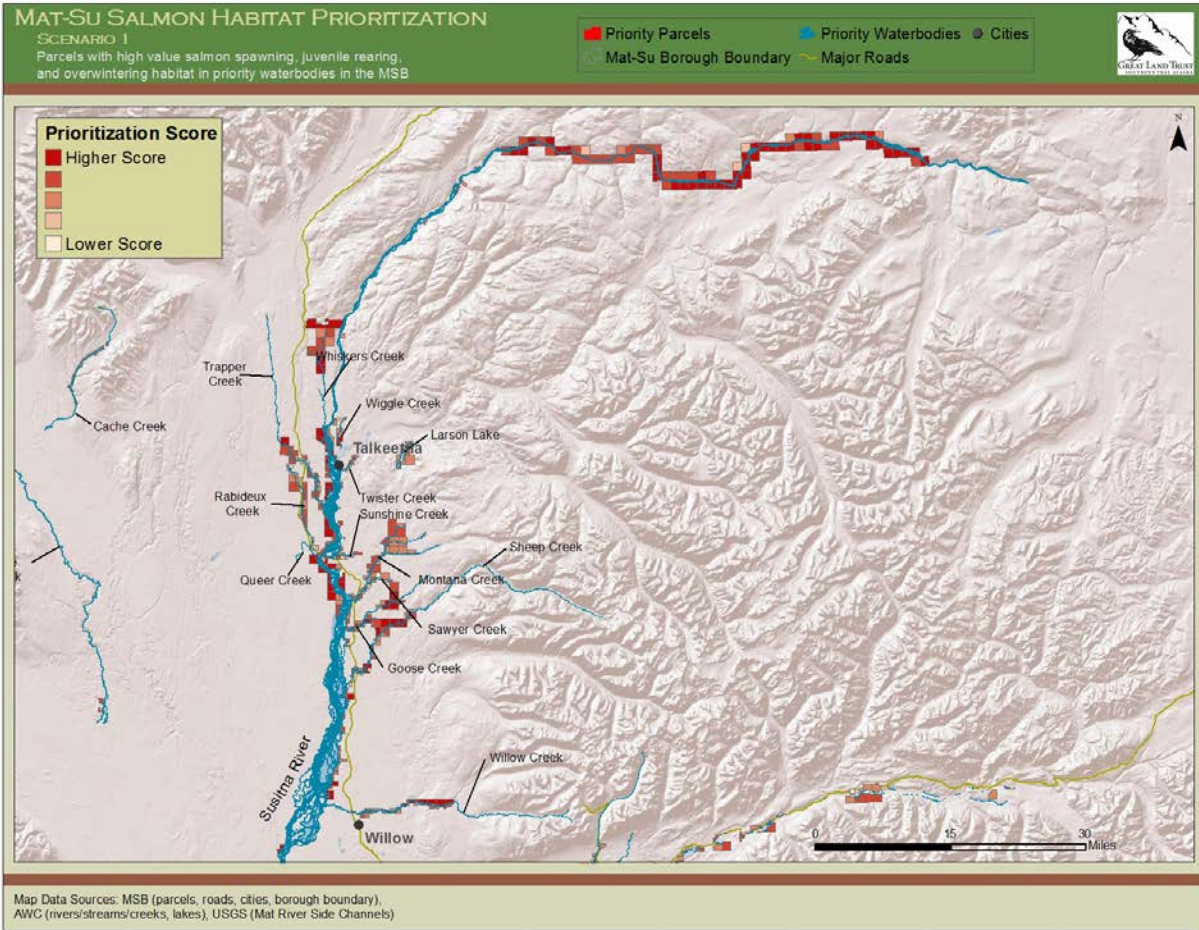
Parcels with high value salmon spawning, juvenile rearing, and overwintering habitat in priority waterbodies in the MSB

- Priority Parcels
- Priority Waterbodies
- Cities
- Mat-Su Borough Boundary
- Major Roads



Map Data Sources: MSB (parcels, roads, cities, borough boundary), AWC (rivers/streams/creeks, lakes), USGS (Mat River Side Channels)

**This map highlights all the waterbodies and parcels scored with the prioritization.**



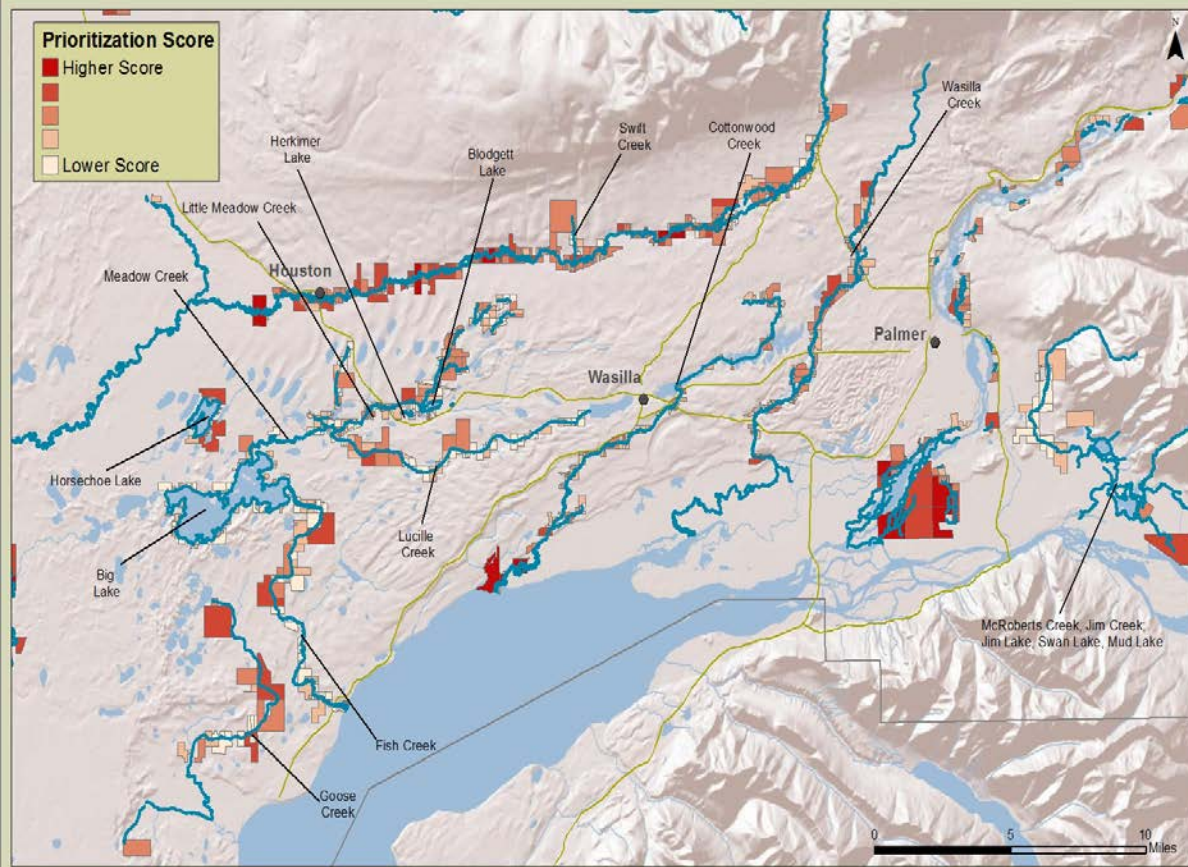
**This map is zoomed in to show parcels in the Upper Susitna area.**

# MAT-SU SALMON HABITAT PRIORITIZATION

## SCENARIO 1

Parcels with high value salmon spawning, juvenile rearing, and overwintering habitat in priority waterbodies in the MSB

- Priority Parcels
- Priority Waterbodies
- Cities
- Mat-Su Borough Boundary
- Major Roads



Map Data Sources: MSB (parcels, roads, cities, borough boundary), AWC (rivers/streams/creeks, lakes), USGS (Mat River Side Channels)

**This map is zoomed in to the core area of the MSB.**