

Alaska Sustainable Salmon Fund Statement of Work

I. Project Title: Strategic Conservation of Priority Salmon Habitat – Phase 8

II. Project Number: 54010

III. Principal Investigator

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IV. Project Period: 3/1/21 – 11/30/23

V. **AKSSF Objective:** Land conservation **PCSRF Objective:** HP&R

VI. **Project Description**

1. Synopsis

Great Land Trust (GLT) will work with willing landowners to target and conserve important salmon habitat through conservation easements and fee-title acquisitions, permanently protecting 500 acres or more of land and the waters bodies they encompass.

2. Introduction

GLT is a private, nonpartisan, non-profit organization formed in 1995 with a mission to conserve and steward lands and waters essential to the quality of life and economic health of Alaskans. Over the past 25 years, GLT has completed 58 conservation projects totaling over 56,000 acres of valuable habitat including over 95 miles of salmon corridor. Working throughout Southcentral Alaska, GLT has a proven track record of conserving salmon habitat in the most rapidly developing and developed areas of the state.

Background: This project builds upon seven prior AKSSF grants awarded to GLT to prioritize and conserve important salmon habitat (AKSSF projects 44712, 44806, 44159, 44202, 51005, 52010, 53001, *Strategic Conservation of Important Salmon Habitat – Phases 1-7*). With these grants and Geographic Information System (GIS) habitat prioritization data, GLT identified and conserved over 7,932 acres and 21.8 miles of important salmon habitat. AKSSF previously funded GLT to prioritize and conduct outreach to landowners to develop potential projects. This has resulted in potential projects proposed for conservation in this project. In the coming years using currently open AKSSF awards, GLT plans to complete additional AKSSF conservation projects in Palmer, Kenai, Afognak, Anchorage, and Tazlina which will conserve additional salmon habitat and other land important to salmon.

Purpose: This project will build on GLT’s past successes as well as GLT’s agency and community partnerships to directly conserve important salmon habitat via acquisition and/or conservation easements. All projects completed with this funding will be supported by local, regional, state, or federal habitat conservation plans.

Scope: GLT will use the results from its habitat prioritizations to target conservation projects throughout its service area to permanently protect 500 acres of priority habitat supporting spawning, overwintering, and/or rearing habitat for Chinook (*Onchorhynchus tshawytscha*), coho (*O. kisutch*), sockeye (*O. nerka*), chum (*O. keta*), pink salmon (*O. gorbuscha*) or steelhead trout (*Oncorhynchus mykiss*) populations.

Activities: GLT will work with community and agency partners and private landowners to complete land conservation projects that directly protect important salmon habitat. In addition to specifically targeting land conservation projects that are in a designated Subsistence Harvest Area identified by the Alaska Department of Fish & Game (ADF&G), GLT will work to protect salmon habitat that is threatened by

incompatible development as well as habitat in areas that may or may not be utilized by subsistence stocks.

GLT’s protection methods include conservation easements and fee-simple acquisitions. Conservation easements will be granted via donation or by purchase. GLT will annually monitor and enforce easements it holds in perpetuity to ensure that the conservation values have not been impacted or degraded by human alteration.

Acquisition projects will be purchased from or donated by willing landowners, transferred into public ownership with a municipal, state, or federal entity, or to a tribal entity or non-profit organization, and managed as part of a new or existing refuge or natural or protected area.

3. Locations

Potential Projects	Lat	Long
Little-Su River Project Site City of Houston, Matanuska-Susitna Basin	61.627481	-149.793395
O’Brien Creek Estuary II Project Site Knik Townsite, Upper Knik Arm	61.472429	-149.696334
Northern Afognak Project Site Afognak Island, Kodiak Archipelago	58.265210	-152.292929
Mineral Flats Valdez, Prince William Sound	61.135340	-146.415046
Clear water springs at Tonsina River/Copper River Confluence Project Site Kenny Lake, Copper River Basin	61.642062	-144.630227

4. Related Projects

44712, 44806, 44159, 44202, 51005, 52010, 53001

VII. Objectives

Protect priority salmon habitat through land acquisition and/or conservation easement

VIII. Methods

Identifying lands for conservation: GLT uses GIS resources, ecological data, land use information, expert opinion, and partner priorities to rank lands for conservation. GLT is constantly updating its GIS database as newer data layers become available. Using these tools ensures that GLT is working strategically to conserve the areas that contain the most critical habitats for fish and wildlife and lands most valued by the community. These prioritizations have been used to identify potential projects for this award. Along with using the most current GIS data available to identify and rank lands for their conservation value, GLT enlists the support of local, regional, and agency experts to verify GIS findings.

As real estate transactions take many willing partners, if any of the selected projects become inviable, GLT will review current conservation opportunities, ecological information, and prioritization results and evaluate conservation opportunities with agency partners to ensure that limited salmon habitat conservation funds are most effectively utilized.

Relationship Building with Private Landowners and Partners: Once a project is identified, GLT reaches out to that landowner to explore their interest in conservation options for their lands. This includes travel to communities throughout GLT's service area to meet with private landowners. Project selection is determined by criteria including the following: 1) habitat value to salmon, 2) an interested and willing landowner, 3) parcel threat, 4) parcel value to subsistence uses, 5) project cost is feasible with resources available from AKSSF, non-federal matching fund sources, and other leveraged funding sources. For acquisition projects, it will be necessary to spend significant time in the community meeting with local, state, federal, municipal, or tribal governments to cultivate relationships and identify the right future owners/land manager for the project. Once a landowner has agreed to a conservation action, GLT completes the initial site assessments of the property to further document the conservation value of the salmon habitat. Once the site assessment is done, each project is presented to the GLT Board of Directors for approval to move forward.

Due Diligence and Easement Drafting: After the GLT Board approves a project, GLT staff begin working on due diligence. Due diligence activities include, at minimum, a title review, environmental hazard report, appraisal, and a property boundary survey. Once the due diligence activities are completed, GLT staff begin working with the landowners to draft an engagement letter if the property will be donated or purchase and sale agreement if the property will be purchased. After both parties agree in concept to move forward with the conservation project, GLT works with the landowner 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 visit the property to complete the Baseline Documentation Report (BDR). GLT completes BDRs for each conservation easement GLT holds. This report is necessary because it creates a legal document that describes in narrative and photos the condition of the property at the time the conservation easement is conveyed.

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 tribal, non-profit, municipal, state, or federal partner that has the resources to assume ownership and to manage the land for conservation purposes. In some instances, GLT will retain a conservation easement on a fee simple property.

Specific tasks to achieve salmon habitat protection include the following:

- Review GLT parcel prioritizations to identify the best potential projects for AKSSF funding; GLT will identify more projects than can be completed with this

funding because some projects may become inviable due to timeline, title issues, landowner interests, or other obstacle identified during due diligence

- Meet with stakeholders to review potential projects to ensure GLT is choosing land that would significantly benefit from conservation efforts
- Reach out to the specific landowners to get their approval to move forward with a conservation easement or acquisition
- Meet with agency and municipal partners to determine the appropriate owners/land managers and get the formal approvals necessary
- Complete the GLT Board approval process including site visit, habitat assessment, conservation value documentation, and draft project budget
- Receive signed engagement letter or draft and sign purchase and sale agreement with landowner
- Complete due diligence for each project including a title search, property boundary survey, Environmental Hazard Assessment (Phase I Report), Uniform Standards of Professional Appraisal Practice (USPAP) Appraisal, legal review of documents, and Baseline Documentation Report
- Conduct land protection mechanism negotiations (conservation easement or fee title acquisition)
- Close and record conservation easements or acquisition projects
- Work with the new property owner to establish long-term land management strategies in order to ensure habitat protection
- Publish project information in GLT's monthly newsletter highlighting salmon conservation

IX. Benefits

This project will permanently protect approximately 500 acres of priority habitat supporting spawning, overwintering, and/or rearing Chinook, coho, sockeye, chum, and pink salmon and/or or steelhead trout populations. Conservation efforts will be focused on areas experiencing the most pressure from development and those identified by ADF&G as subsistence use areas.

X. Products, Milestones, and Timelines

April 2021 – December 2021:

- Finalize habitat conservation projects to be pursued
- Contact landowners to determine interest and type of project (conservation easement or acquisition)
- Complete initial site and habitat assessment to determine conservation value
- Request signed willingness statements/engagement letters from landowners establishing interest in moving forward with the project
- Complete budgets for each project
- Obtain initial GLT Board approval for due diligence

January 2022 – December 2022:

- Complete title reports

- Complete environmental hazard (‘Phase 1’) reports
- Draft conservation easements or purchase and sale agreements
- Complete appraisals and identify the property or conservation easement fair market value
- Work with community, agency, and/or municipal partners to secure acceptance of acquired lands and a deed restriction or management agreement addressing habitat conservation
- Complete baseline documentation report for conservation easements that establish the conditions on the property at the time the easement is conveyed
- Complete conservation easements or acquisition negotiations

January 2023 – October 2023:

- Close on and record conservation easements or fee simple title
- Transfer property to community, agency, and/or municipal partners and work with the new property owners to establish long-term land management strategies
- Publish stories about completed projects in GLT’s monthly eNews highlighting the parcels conserved through this project

XI. Project Budget

GLT Budget	Total
100 Personnel	\$99,800
200 Travel	\$8,173
300 Contractual	\$86,500
400 Supplies	\$0
500 Equipment/Real Property	\$500,000
Subtotal	\$694,473
Expenses not subject to indirect	\$500,000
600 Indirect	\$19,447
Total	\$713,920

GLT Budget Narrative:

Line 100: Personnel (\$99,800)

The Great Land Trust team will engage landowners and work with them to draft the conservation easements and/or purchase agreements, coordinate with state, municipal, or tribal entities on acquisition projects, solicit bids and select contractors as necessary for due diligence activities, track matching funds, complete the baseline report for each project, and perform all the necessary reporting and compliance requirements for the grant. Fringe costs include paid time off, health insurance, taxes, and retirement benefits and are included in the listed hourly rate.

- Ellen Kazary, Executive Director, is responsible for financial management, ensuring compliance with all rules, regulations, and reporting requirements, and overseeing the budget and staff in relation to the project: 400 hours @ \$70/hour = \$28,000.

- Dave Mitchell, Conservation Director, will coordinate with local agency and governmental partners, coordinate with landowners and explain the conservation options available, perform conservation easement and acquisition negotiations, and approve due diligence documentation: 400 hours @ \$61/hour = \$24,400.
- Mike Schroeder, Conservation Project Manager, will supervise all contractors for due diligence, draft the conservation easement and purchase and sale agreements, and coordinate closing transactions on projects: 400 hours @ \$53/hour = \$21,200.
- Amanda Peacock Hults, Stewardship Director & Lands Manager, will be responsible for project-related GIS mapping and will perform the initial fieldwork and baseline documentation reporting including field/site assessment and documentation of conservation values necessary for each project as well as prepare for long-term management of conserved properties: 458 hours @ \$48/hour = \$22,000.
- Libby Kugel, Communications & Administration Manager, will be responsible for office and grant administration activities directly related to this project including entering expenditures in Quick Books, filing narrative and financial reports, coordinating travel and meetings, and project communications and publicity: 100 hours @ \$42/hour = \$4,200.

Line 200: Travel (\$8,173)

- Mileage reimbursement for staff to drive throughout the region including the Matanuska-Susitna Borough and Tazlina to facilitate projects: 2,000 miles @ \$0.575/mile = \$1,150
- Airfare Anchorage to Kodiak or Valdez: 6 tickets @ \$400/ticket = \$2,400
- Lodging in Kodiak or Valdez: 12 nights @ \$194/night = \$2,328
- Meals per diem in Kodiak or Valdez: 18 days @ \$90/day = \$1,620
- Car rental in Kodiak or Valdez: 9 days @ \$75/day = \$675

Line 300: Contractual (\$86,500)

- Title insurance reports and closing costs: 5 reports @ \$1,500/report = \$7,500
- Environmental Hazard Assessment Phase 1 reports: 5 reports @ \$3,600/report = \$18,000
- USPAP appraisals: 5 appraisals @ \$7,000/appraisal = \$35,000
- Land surveys: 2 surveys @ \$8,000/survey = \$16,000
- Attorney consultations to review the conservation easement drafts: 5 legal consultations @ \$2,000/consultation = \$10,000

Line 500: Equipment/Real Property (\$500,000)

- Acquisition costs (not to exceed appraised value) for the purchase of conservation easements or fee-simple acquisitions: \$500,000

Line 600: Indirect (\$19,447)

- GLT will use the de minimis indirect rate of 10% (as described in 2 CFR 200) which excludes, among other items, subaward amounts over \$25,000, capital expenditures, and equipment.

XII. Match Budget

GLT Match Budget	Total
100 Personnel	\$0
200 Travel	\$0
300 Contractual	\$249,872
400 Supplies	\$0
500 Equipment	\$0
Total	\$249,872

GLT Match Budget Narrative:

Line 500: Equipment/Real Property (\$249,872)

GLT will provide a combination of in-kind and cash match. The in-kind value of donated conservation easements and/or a bargain sale for acquisitions (when a landowner sells property for less than the fair market value) will be determined and documented by a professional appraisal.