

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

**I. Project Title:** Strategic Conservation of Priority Salmon Habitat – Phase 9

**II. Project Number:** 55003

**III. Principal Investigator**

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**IV. Project Period:** 3/1/22 – 11/30/24

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

## VI. **Project Description**

### 1. Synopsis

This project will leverage AKSSF funds to conserve approximately 500 acres of salmon habitat. Following past prioritizations and landowner outreach, Great Land Trust (GLT) will work with specific landowners to target and achieve permanent conservation of priority salmon habitat through conservation easements or fee simple acquisitions.

### 2. Introduction

Great Land Trust (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. GLT's service area is Southcentral Alaska and includes the Municipality of Anchorage, the Matanuska-Susitna Borough, Kenai Peninsula and the culturally and geographically diverse communities of Western Cook Inlet, the Copper River Basin (including Cordova), Prince William Sound, and Kodiak and Afognak islands.

Over the past 26 years, GLT has completed 63 conservation projects totaling over 56,000 acres of valuable habitat including over 120 miles of salmon corridor and 50 miles of coastline. 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 eight prior AKSSF grants awarded to GLT to prioritize and conserve important salmon habitat (AKSSF projects 44712, 44806, 44159, 44202, 51005, 52010, 53001, and 54010). With prior AKSSF grants, parallel fundraising efforts, and GIS habitat prioritization data, GLT has been able to identify and conserve over 7,952 acres and over 22 miles of important salmon streams. AKSSF previously funded GLT to prioritize and conduct outreach to landowners to develop potential projects (through AKSSF project #45978). This has resulted in the potential projects proposed for conservation described below.

**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 or other real estate mechanisms such as permanent deed restrictions. All projects completed with this funding will be supported by local, regional, state, or federal habitat conservation plans.

**Scope:** Since 1999, GLT has been using GIS resources to identify and conserve lands with high conservation value in its service area and has completed prioritizations of most of it. For this funding request, GLT will use the results from these prioritizations to target conservation projects throughout its service area to permanently conserve approximately 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 (*O. mykiss*) populations.

**Activities:** GLT will work with community and agency partners and private landowners to complete land conservation projects that directly conserve important salmon habitat. Habitat in areas utilized by subsistence stocks and in a designated Subsistence Harvest Area identified by Alaska Department of Fish & Game (ADF&G) will be targeted. In addition, GLT will target projects that are threatened by incompatible development throughout the service area.

GLT’s conservation methods include conservation easements and fee simple acquisitions. Conservation easements will be granted via donation or by purchase. A conservation easement is a voluntary legal agreement between a landowner and a land trust that limits development or use of a property for conservation purposes, such as conserving wildlife habitat, open space, productive farmlands, or important salmon habitat. All of GLT’s conservation easements are perpetual.

Once a conservation easement is in place, with GLT’s dedicated Stewardship Fund, GLT will annually monitor and enforce the easement in perpetuity to ensure that the conservation values have not been impacted or degraded by human alteration. If a violation occurs and the conservation values have been negatively impacted, GLT will work with the landowners to mitigate the impact or pursue litigation to address the violation and restore the conservation values.

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, natural, or conservation area. In some cases, GLT will retain a conservation easement on lands that are granted to a third party. Projects that conserve salmon habitat on threatened municipal or borough lands will be accomplished with deed restrictions as appropriate to the project.

3. Location

The following three high ranking priority lands within GLT’s service area are targeted for conservation through this project; if GLT is unable to conserve these lands, other high priority locations will be conserved:

Potential Projects	Lat	Long
Sturgeon River Project Site Sturgeon Lagoon, Kodiak Island	57.492274	-154.511027
Girdwood Coastline: Glacier Creek flats, Virgin Creek flats Girdwood, Municipality of Anchorage	60.939005	-149.163866
Cottonwood Creek Project Site Palmer Hay Flats State Game Refuge, Palmer	61.499499	-149.580376

#### 4. Related Projects

44712, 44806, 44159, 44202, 51005, 52010, 53001, 54010

### VII. Objectives

Permanently conserve priority salmon habitat through conservation easements and/or fee simple acquisitions.

### VIII. Methods

**Identifying lands for conservation:** To ensure that the proposed work focuses on the highest conservation value projects and the lands most important to sustainable salmon populations, GLT uses GIS resources, ecological data, land use information, expert opinion, and partner priorities to rank lands for conservation. GLT continues to update 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 the GIS findings. GLT already prioritized, selected, and developed three potential projects to pursue with this project. 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 the 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, and 5) feasibility of project cost 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. GLT conducts extensive community outreach during this phase of the project and works closely with the local government, community, and land managers where GLT is working.

**Due Diligence and Easement Drafting:** After the GLT Board approves a conservation easement project, GLT staff will work 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 will work 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. If necessary, GLT will also perform additional fundraising to complete the project.

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 held. This report is necessary because it describes in narrative and photos the condition of the property at the time the conservation easement is conveyed. The report documents the historical and current uses of the property and summarizes each of the conservation values being conserved 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.

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. As mentioned above, determining the right partners and getting the appropriate approvals often takes significant time, attendance at official meetings, legal review from governmental council, and formal resolutions by the entity. In some instances, GLT will retain a conservation easement on a fee simple property. As an example, GLT has worked for many years to purchase properties for greenbelts, parks, and open spaces in the Municipality of Anchorage and the Mat-Su Borough. With these acquisitions, GLT retains a conservation easement on the acquired lands to ensure that the conservation values are conserved over the long-term through various administrative changes.

## **IX. Benefits**

This project will permanently protect via conservation easement, deed restriction, and/or fee simple acquisition approximately 500 acres of priority habitat supporting spawning, overwintering, or rearing Chinook, coho, sockeye, chum, and/or pink salmon or steelhead trout populations. By directly and permanently conserving priority salmon habitat, these projects will protect and maintain salmon populations in perpetuity.

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

### April 2022– December 2022:

- Finalize the specific salmon habitat conservation projects moving forward based on priority, habitat value, landowner interest, and funding

- Contact landowners to determine interest and type of project (conservation easement or acquisition)
- Complete initial site and habitat assessment to determine conservation value and type of project (conservation easement or acquisition)
- Request signed willingness statements/engagement letters from landowners establishing interest in moving forward with the projects
- Complete budgets for each project
- Obtain initial GLT Board approval for due diligence
- Begin community engagement including presentations to community partners, local governments, and the State of Alaska

January 2023– December 2023:

- Complete title reports
- Complete environmental hazard reports (‘Phase 1’)
- Draft conservation easements or purchase and sale agreements
- Complete appraisals and identify fair market values
- Continue community engagement including receiving resolutions and/or approvals from local governments and the State of Alaska as appropriate
- Receive approval for projects by the ADF&G Commissioner
- Work with community, agency, and/or municipal partners to secure acceptance of acquired lands and deed restrictions or management agreements addressing habitat conservation
- Complete baseline documentation reports for conservation easements that establish the conditions on the property at the time the easement is conveyed
- Complete conservation easements or acquisition negotiations

January 2024– October 2024:

- Close on and record conservation easements or fee simple titles
- Transfer property to community, agency, and/or municipal partners as appropriate; work with new property owners to establish long-term land management strategies in order to ensure habitat protection
- Publish stories about completed projects in GLT’s monthly eNews highlighting the parcels conserved with AKSSF funds

**XI. Project Budget**

<b>GLT Budget</b>	<b>Total</b>
100 Personnel	\$100,000
200 Travel	\$8,143
300 Contractual	\$580,500
400 Supplies	\$0
500 Equipment	\$0
Subtotal	\$688,643
Expenses not subject to indirect	\$500,000
600 Indirect	\$18,864

Total	\$707,507
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GLT Budget Narrative:

Line 100: Personnel (\$100,000)

The GLT Executive Director, Conservation Director, Conservation Project Manager, Stewardship Director & Lands Manager, and Communications & Administration Manager will be responsible for completing the objectives and deliverables of this project. The GLT 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, will be responsible for financial management, ensuring compliance with all rules, regulations, and reporting requirements, and overseeing the budget and staff: 400 hours @ \$73/hour = \$29,200.
- 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 @ \$63/hour = \$25,200.
- Mike Schroeder, Conservation Project Manager, will supervise all contractors for due diligence, draft the conservation easements and purchase and sale agreements, and coordinate closing transactions: 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 necessary for each project as well as prepare for long-term management of conserved properties: 300 hours @ \$52/hour = \$15,600.
- 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: 200 hours @ \$44/hour = \$8,800.

Line 200: Travel (\$8,143)

GLT staff will travel to project sites in order to facilitate projects including meeting with the landowners, conducting negotiations, overseeing the onsite work of contractors, and conducting onsite baseline and environmental reports.

- Mileage to drive throughout the region (including to Anchorage, Girdwood, and the Matanuska-Susitna Borough) to facilitate projects: 2,000 miles @ \$0.56/mile = \$1,120.
- Airfare Anchorage - Kodiak: 6 RT tickets @ \$400/ticket = \$2,400
- Lodging in Kodiak: 12 nights @ \$194/night = \$2,328
- Meals per diem in Kodiak: 18 days @ \$90/day = \$1,620
- Car rental in Kodiak: 9 days @ \$75/day = \$675

Line 300: Contractual (\$80,500)

- Title insurance reports and closing costs: 3 reports @ \$2,000/report = \$6,000
- Environmental Hazard Assessment Phase 1 reports: 3 reports @ \$5,000/report = \$15,000
- USPAP appraisals: 2 appraisals @ \$8,000/appraisal + 1 appraisal @ \$20,000 = \$36,000
- Land surveys: 2 surveys @ \$8,000/survey = \$16,000
- Attorney consultations to review the conservation easement drafts: 3 legal consultations @ \$2,500/consultation = \$7,500

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 (\$18,864)

- 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**

<b>GLT Match Budget</b>	<b>Total</b>
100 Personnel	\$0
200 Travel	\$0
300 Contractual	\$247,628
400 Supplies	\$0
500 Equipment	\$0
<b>Total</b>	<b>\$247,628</b>

GLT Match Budget Narrative:

Line 500: Equipment/Real Property (\$247,628)

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.