



## Section 11: Guidelines for Acquisition Projects

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The following criteria, guidelines and recommendations are intended to ensure the objective and efficient evaluation of *acquisition* (habitat protection) proposals\*. Recommendations are intended to help sponsors develop stronger proposals and reviewers to evaluate proposals involving complex legal and real estate transactions within the context of strategic salmon protection and recovery goals.

While the focus of Section 11 is on *acquisition* proposals, the following guidelines and recommendations are intended to strengthen the overall evaluation process and help ensure objective evaluation of all proposals regardless of approach (acquisition, restoration or assessment).

*\* Acquisition proposals result in the protection of salmon habitat through securing legal interest in real property. Acquisition can be achieved through the outright purchase or donation of land, by securing a permanent conservation easement on all or part of the property, or through the purchase or transfer of development rights associated with a property.*

### **Ranking Criteria:**

The Habitat Work Group Review Committee currently evaluates all salmon recovery proposals (acquisition/restoration/assessment) using eighteen *ranking criteria*. Ranking criteria are presented below in the order listed in the Chehalis Lead Entity Score Sheet. Specific recommendations for reviewers and sponsors follow each criterion.

### **Criteria 1: Critical Need**

*Does the proposal address an imminent threat to salmonid habitat and clearly articulate how the threat will be addressed?*

Potential examples of threat:

- Proposed subdivision/development of property
- Planned land use conversion
- Planned timber harvest
- Loss of native vegetation
- Contamination from stormwater runoff, failing waste disposal systems, livestock, etc.

Recommendation for sponsors and reviewers: Whenever possible, project sponsors should provide evidence of imminent threat such as subdivision/survey/engineering plan;

landowner letter of intent; MLS “for sale” listing; history of loss/conversion of similar properties; timber harvest application/permit; indication of contamination, etc.

## **Criteria 2: Species**

*Will the project protect or restore habitat for multiple salmonid species and/or unique populations?*

Recommendation for reviewers: Ensure sponsor adequately documents species use/benefit and data sources (or justifies belief that future benefit will result)

Considerations for reviewers: A strong proposal may provide significant benefit for fewer species vs. limited benefit for multiple species

## **Criteria 3: Life History Benefits**

*Will the project benefit multiple life history stages and/or address those factors which may limit specific life stages?*

## **Criteria 4: Watershed Processes and Habitat Features**

*Does the project protect or restore high-priority habitat features and/or watershed processes?*

4a) Does the proposal clearly describe habitat types, conditions and processes, as well as anticipated benefits to salmon associated with protected habitat?

4b) Does the proposal clearly articulate how the project boundaries were determined and why protection of the entire project area is necessary?

4c) Does the proposal clearly identify the boundaries and scope of the area proposed for protection?

Recommendation for reviewers: Ensure project sponsor has adequately described (not just listed) the habitat types associated with project site (i.e. main-stem, freshwater wetland, off-channel, barrier beach, etc.) and how these habitats benefit salmon.

Recommendation for sponsors: Describe habitat connectivity and watershed processes (i.e. Sediment Input, Transport and Accretion, Freshwater Input, LWD recruitment, Detritus Import and Export, Exchange of Aquatic Organisms, Solar Radiation, etc.) within the context of a functioning habitat system.

Recommendation for sponsors: Ensure proposal adequately explains why protection of entire project footprint is necessary (i.e. likely impacts of upland activities on shoreline areas, landowner not willing to sell/protect only shoreline areas, etc.)

### **Criteria 5: High Priority Areas and Actions**

*Does the proposal address a high priority action in a high-priority geographic area?*

Recommendation for reviewers: Ensure project sponsor substantiates proposed action as a Tier 1, Tier 2 or Tier 3 action within the sub-watershed or geographic area (according to LE strategy/sub-watershed analysis).

Recommendation for sponsors: A project may be strategically important and justified despite lack of available data. Clearly articulate justification if proposed action and site are not prioritized by LE strategy/sub-watershed analysis.

### **Criteria 6: Quantity of Benefit**

*Does the proposal quantify project benefits for target species? Has the sponsor adequately described how the project will result in anticipated benefits? Will the project result in significant improvement or preservation of habitat function or species abundance/diversity?*

6a) Will acquisition protect an intact/functioning habitat system and sustain critical habitat processes?

6b) Will acquisition protect an integral part of a larger intact/functioning habitat system and sustain important processes within the overall system?

6c) Will the acquisition protect habitat that is not necessarily essential to the function of a larger system?

Consideration for reviewers: Does the proposal adequately quantify habitat to be protected (i.e. 74-acre project site, 7 acres of estuarine intertidal wetlands, 4,230' of forested riparian shoreline, 67 acres of mature conifer forests, etc.) and explain how these habitats benefit salmon species?

Consideration for Lead Entity/reviewers: Avoid oversimplification of quantity requirements (i.e. A 10-acre project site with 90% intact habitat would protect only 9 acres of priority habitat while a 200-acre site with 30% intact habitat would protect 60 acres of priority habitat).

### **Criteria 7: Synergy with Other Actions**

*Does the project build on prior investment and is the proposal part of a strategic approach to achieving habitat goals? Will the project result in a clear net benefit (greater than the proposed project alone) because of this strategic approach?*

7a) Does the proposal build on prior investment and is it part of a strategic approach to achieving Chehalis habitat protection and restoration goals?

7b) Is the project a strategic component of a new initiative and has the sponsor articulated a vision for future investment and actions?

7c) Does the proposal seek to invest funds in a stand-alone or primarily *opportunistic* (vs. strategic) transaction?

### **Criteria 8: Approach**

*Is the proposed action consistent with proven scientific methods?*

Recommendation for sponsors: Ensure the proposal clearly articulates how targeted species, life stages and habitats will be protected.

Recommendation for sponsors: Ensure the proposal provides a detailed estimate of stewardship/legal defense costs and articulates how and when this funding will be secured.

Recommendation for reviewers: Ensure sponsor has clearly articulated how approach will result in protection goals and has a clear plan for carrying out long-term stewardship responsibilities.

### **Criteria 9: Scope**

*Is the project scope appropriate to meet project goals and objectives?*

Considerations for reviewers:

- Primary threats to sensitive nearshore habitat areas often result from conversion/intensive use of adjacent upland areas.
- Parcel boundaries often do not conform to on-the-ground habitat features.
- It is often unrealistic to acquire/protect priority habitat areas only. A landowner is unlikely to agree to protect just the shoreline portions of a property because of the reduction in value and use this would have on adjacent property. Project sponsors can address this issue by explaining why protection of entire site is necessary and how other funding sources and/or a bargain sale are being used to leverage limited salmon funding.

Recommendation for sponsors: Clearly articulate why protection of entire site is necessary and how salmon funding will leverage other funds to protect areas not considered to be priority salmon habitat.

### **Criteria 10: Clear Goals and Objectives**

*Does the proposal include quantifiable actions, goals and SMART\* objectives?*

\* "SMART" = specific, measurable, achievable, relevant and time-bound.

### **Criteria 11: Budget and Cost Effectiveness**

*Is the project budget realistic and does it contain sufficient detail? Is the project cost effective?*

Consideration for reviewers: It is often unrealistic for sponsors to have completed appraisals or secured all “match” funding prior to submitting proposals. Therefore, it is essential that sponsors have sufficient experience developing accurate budgets and a demonstrated record of success securing project funding.

Recommendation for sponsors: The proposal should explain how cost estimates were developed and how the value of property to be acquired will be determined. (i.e. market trends and analysis, relevant appraisal standards, plan for review appraisal, etc.)

Recommendation for sponsors: The proposal should articulate how either outright acquisition or a conservation easement is the most cost-effective approach.

Recommendation for sponsors: The proposal should explain how salmon funding will directly result in protection of salmon habitat and how this investment will leverage “match” funding.

### **Criteria 12: Team Experience**

*Does the project sponsor have a demonstrated ability to complete projects as proposed, on time and according to budget?*

Consideration for reviewers: Acquisition/protection transactions are inherently complex. It is important to recognize that unforeseen challenges will arise as part of every transaction. The sponsor must have the demonstrated expertise, capacity and credibility to manage all aspects of the proposed transaction and address unanticipated challenges.

Recommendation for reviewers: Ensure the sponsor has the demonstrated ability to complete complex projects as proposed, as budgeted and within the stated timeframe.

Recommendation for reviewers: Ensure the sponsor has the demonstrated ability to build and lead multi-stakeholder partnerships that achieve stated goals.

### **Criteria 13: Schedule and Sequence**

*Does the proposal include a logical sequence of actions and is the milestone schedule realistic?*

### **Criteria 14: Permits**

*Are permits required for the project to proceed? If yes, what is the status of permit approval and is the permitting plan/schedule reasonable?*

### **Criteria 15: Landowners**

*Do the participating and affected landowners support the project?*

Consideration for reviewers: All of the following demonstrate landowner awareness and support for a project. It's not realistic to expect sponsors to have signed PSA's or financial commitments in place at time of funding proposals – but type of commitment could increase likelihood of project success.

- Signed Purchase and Sale Agreement (PSA);
- Landowner commitment to selling property or conservation easement at less than full market value (bargain sale);
- Landowner commitment to making significant financial contribution toward stewardship endowment and/or project cost;
- Signed landowner acknowledgment form (landowner awareness of sponsor's intent to apply for funding and a mutual intent to negotiate purchase agreement if funding proposal is successful).

### **Criteria 16: Supports Local Values**

*Does the proposal demonstrate a high level of support from local stakeholders (i.e. social, economic and/or cultural groups)? Is the project supported by adopted plans and policies?*

Recommendation for sponsors: Be specific in citing type of stakeholder support and how this support increases the likelihood of project success.

Recommendation for sponsors: Cite relevant plans and policies and articulate how funding proposal will help meet plan/policy goals.

Recommendation for sponsors: Articulate how proposal will achieve the goals of multiple stakeholders or bring diverse constituencies together around a shared goal.

### **Criteria 17: Education and Outreach**

*Will the project incorporate a beneficial education/outreach program? Will the project foster a community conservation ethic through citizen involvement?*

Recommendation for sponsors: Don't exaggerate! The primary goal of most acquisition projects is to protect intact/functioning habitat systems which may not be suitable for intensive recreation or education activities. Clearly articulate if the protected property will be an integral component of education/outreach programs or if access will likely be limited to scientific study, restoration work parties, etc.

**Criteria 18: Partnerships**

*Will the project benefit from a diverse, multi-stakeholder partnership?*

Recommendation for reviewers: Consider whether partner support is financial and specific. Has the sponsor completed past projects with some/all of these partners? Does the sponsor have a strong track record building and maintaining multi-stakeholder partnerships over time?