

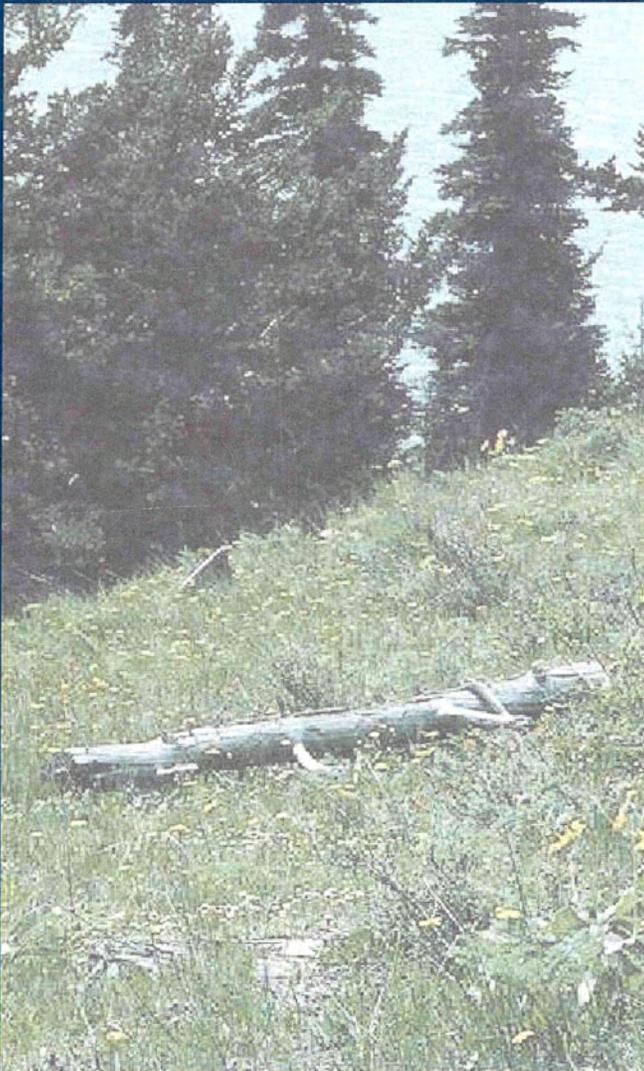


Submitted to the Washington State Legislature

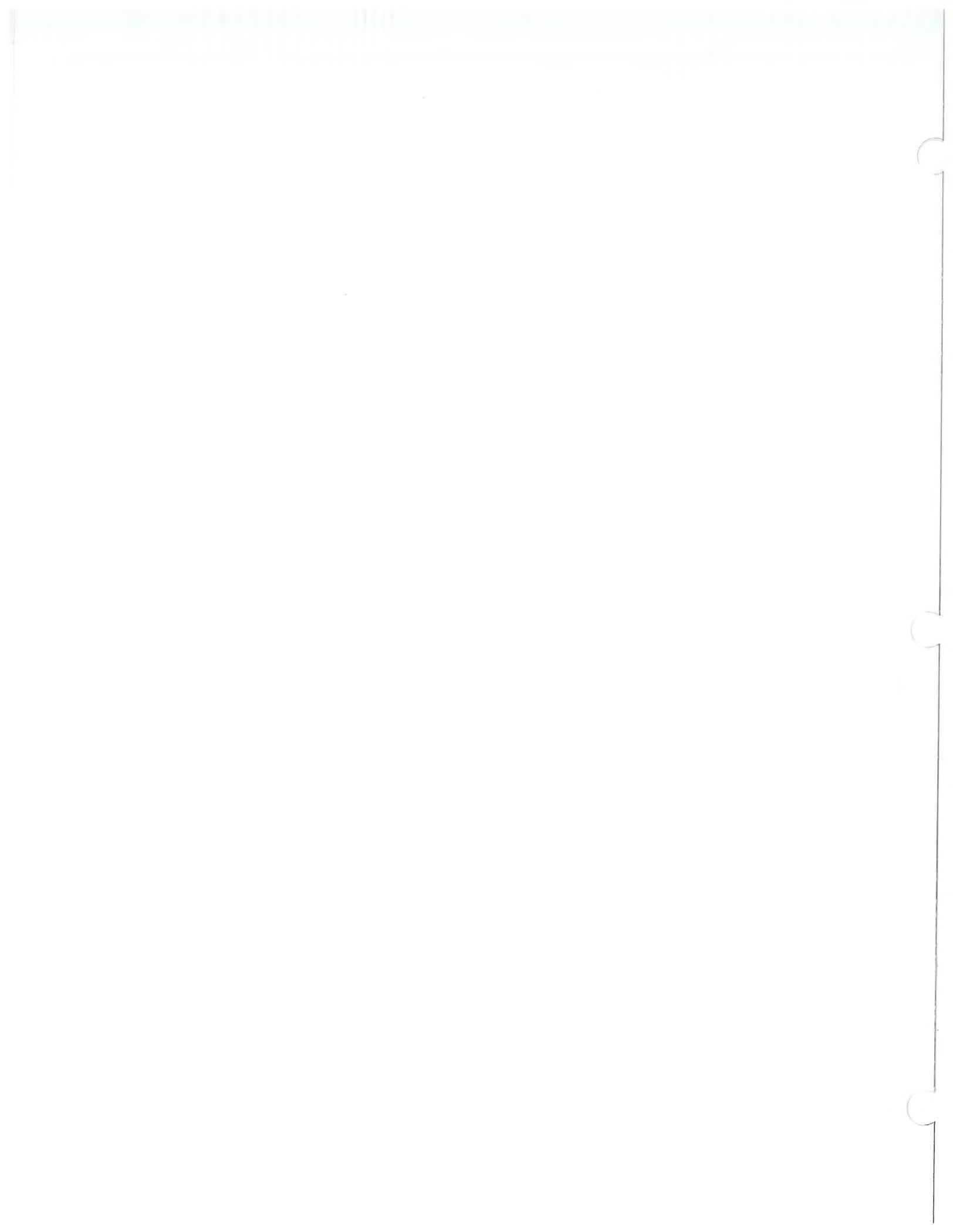
# Toward a Coordination Strategy for Habitat and Recreation Land Acquisitions in Washington State

## APPENDICES

By The Interagency Committee for Outdoor Recreation



June 30, 2005





## APPENDICES

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**A**

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**A**

CERTIFICATION OF ENROLLMENT

**SUBSTITUTE SENATE BILL 6242**

Chapter 263, Laws of 2004

58th Legislature  
2004 Regular Session

LAND ACQUISITIONS, DISPOSAL

EFFECTIVE DATE: 6/10/04

Passed by the Senate February 12, 2004  
YEAS 49 NAYS 0

BRAD OWEN

**President of the Senate**

Passed by the House March 11, 2004  
YEAS 96 NAYS 0

FRANK CHOPP

**Speaker of the House of Representatives**

Approved March 31, 2004.

GARY F. LOCKE

**Governor of the State of Washington**

CERTIFICATE

I, Milton H. Doumit, Jr.,  
Secretary of the Senate of the  
State of Washington, do hereby  
certify that the attached is  
**SUBSTITUTE SENATE BILL 6242** as  
passed by the Senate and the House  
of Representatives on the dates  
hereon set forth.

MILTON H. DOUMIT JR.

**Secretary**

FILED

March 31, 2004 - 3:13 p.m.

**Secretary of State  
State of Washington**

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**SUBSTITUTE SENATE BILL 6242**

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AS AMENDED BY THE HOUSE

Passed Legislature - 2004 Regular Session

**State of Washington**

**58th Legislature**

**2004 Regular Session**

**By** Senate Committee on Natural Resources, Energy & Water (originally sponsored by Senators Parlette and Berkey)

READ FIRST TIME 02/10/04.

1 AN ACT Relating to establishing a statewide strategy for land  
2 acquisitions and disposal; and creating a new section.

3 BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF WASHINGTON:

4 NEW SECTION. **Sec. 1.** (1)(a) The legislature finds that the 1999  
5 public and tribal lands inventory provides a base of information to  
6 begin the development of a statewide coordinated strategy for  
7 acquisition of lands for recreation and habitat preservation and  
8 enhancement. However, updated information is needed on the amount of  
9 recent acquisitions, how they were funded, how those acquisitions could  
10 be compatible with a coordinated strategy, and how they pursue the  
11 goals of single agencies.

12 (b) The legislature further finds that land acquisition decisions  
13 have long-term implications, often in perpetuity, and that some  
14 acquisitions occur outside the oversight of the legislature.

15 (c) The legislature intends to establish a statewide strategy for  
16 coordination of acquisition, exchange or disposal of state agency lands  
17 for recreation and habitat preservation and enhancement, and to clarify  
18 authority for an interagency planning and coordination of that  
19 strategy.

1 (2) The interagency committee for outdoor recreation shall submit  
2 a report to the appropriate policy and fiscal committees of the  
3 legislature and to the governor by June 30, 2005. The report shall  
4 include an inventory of recent habitat and recreational land  
5 acquisitions and a recommended statewide strategy for coordination of  
6 future acquisitions.

7 (a) The inventory shall include habitat and recreational land  
8 acquisitions and disposals since 1980 by state agencies. For the  
9 purpose of this inventory, "land acquisition" means fee simple  
10 acquisition or less than a fee simple interest if that interest is for  
11 more than fifty years. Land acquisitions by state agencies include  
12 those funded by state agencies but owned by local governments. The  
13 inventory shall:

14 (i) Include information about land acquisitions and disposals that  
15 involved land trading or swapping between public and private entities,  
16 and land acquisitions that were gifts;

17 (ii) Specify principal use of the acquired parcels and other data  
18 compatible with the 1999 inventory;

19 (iii) Specify the agency or local government acquiring or disposing  
20 of the property, the costs of the land acquisition or receipts from the  
21 disposal, the funding sources, and whether the land acquisition was  
22 funded under a legislative appropriation, an unanticipated receipt,  
23 and/or exchange of land parcels; and

24 (iv) Include any additional information local governments may  
25 provide to the inventory about habitat and recreational land  
26 acquisitions by land trusts, conservancies, port districts, public  
27 utility districts, and other parties that result in the property's  
28 change to a tax exempt status.

29 (b) The recommended statewide strategy for coordination of habitat  
30 and recreation acquisitions by state agencies, regardless of fund  
31 source, should be consistent with the priorities, policies and criteria  
32 of chapter 79A.15 RCW and, if not, identify what priorities, policies  
33 and goals should apply. The recommended statewide coordinated strategy  
34 should:

35 (i) Ensure that land acquisition and disposal decisions are based  
36 on a determination of need for recreational and habitat lands compared  
37 to existing public lands serving those purposes in various areas of the  
38 state;

1 (ii) Specify how to provide a central, interagency point of  
2 coordination to ensure that land acquisitions by state agencies,  
3 including land acquisitions funded through unanticipated receipts, are  
4 consistent with statewide priorities, policies and goals;

5 (iii) Examine alternative ways to compensate local governments by  
6 spreading statewide the impact of lost tax revenues from acquisitions  
7 of property for habitat and recreation;

8 (iv) Consider options for a no net gain policy in counties with  
9 large portions of existing public habitat and recreational land; and

10 (v) Consider what policies, priorities, and goals may apply to the  
11 statewide coordinated strategy. The report may consider population  
12 based goals for recreation needs, changes in use of public lands,  
13 provisions for scenic areas and green ways, wildlife corridors, forest  
14 buffers, designated critical areas, local, state and federal wildlife  
15 protection plans, and multi-use functions of existing publicly owned  
16 lands.

Passed by the Senate February 12, 2004.

Passed by the House March 11, 2004.

Approved by the Governor March 31, 2004.

Filed in Office of Secretary of State March 31, 2004.

**B**

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**B**

# **Summary of Washington State Parks Land Acquisition Process**

## **May 16, 2005**

### **BACKGROUND**

State Parks has enjoyed a long tradition of benefiting from the generosity and civic spirit of individuals wishing to donate property for public park purposes. In fact, in 1915 the Legislature established the State Board of Parks Commissioners (now the State Parks and Recreation Commission) to accept donation of the first state park holdings: John R. Jackson House and Chuckanut State Park (now Larabee State Park).

Along with donations, the early state park system benefited significantly from transfer of land from the State Commissioner of Public Lands and the Federal Government. The Parks Bill of 1949 saw the first significant funding source for property acquisition from driver's license fees. Parks Commissioners could actively seek out property for park purposes, not simply choose to accept or reject donations. State Referendum 11 in 1963, the federal Land and Water Conservation Fund Act 1964, State Referendum 18 in 1967, and State Referendum 28 in 1972 provided continued funding for acquisition of land in this more agency-directed manner. Initiative 215, the Marine Recreation Land Act in 1965 provided funding for acquisition of property for boating facilities and related upland opportunities. Established by the Legislature in 1990, the Washington Wildlife and Recreation Program currently provides bulk of state funding for state parks land acquisition.

Early in the system's history, most land was acquired for new park sites. However, by the early 1960's, most of the agency's flagship parks had been established and agency attention shifted towards adding lands to existing parks. The shift towards blocking up holdings in and around existing parks continues as the primary thrust of the agency's acquisition strategy. However, acquisition of new, stand-alone properties has continued during the past twenty years at about one major acquisition per year.

### **ACQUISITION OF PROPERTIES ASSOCIATED WITH EXISTING STATE PARKS**

#### **CAMP Project**

With rapid population growth and sprawling development, societal value of parklands has proportionately risen. The task of planning land acquisition and development of state parks is an intricate balance between protecting and conserving significant natural and cultural resources while providing opportunities for people to appreciate and enjoy them. To find the appropriate balance between recreation and conservation in individual state parks, the agency has developed a system of comprehensive planning. The Classification and Management Planning Project, or CAMP, provides three main deliverables:

- Classifies lands within parks by appropriate use and development intensity
- Delineates long-term park boundaries (park-specific property acquisition/surplus plan), and
- Develops park management plans to guide resource stewardship activities.

CAMP uses a system of six land classifications: Natural Area Preserves, Natural/Natural Forest Areas, Resource Recreation Areas, Recreation Areas, and Heritage Areas. Classifications are

aligned along a spectrum ranging from low to high-intensity recreational uses and developments. When assigned to a specific area within a park, each classification sets the appropriate intensity for recreational activity and facilities development. Agency staff develops classification recommendations through critical analysis of natural and cultural resource inventories, evaluation of existing and future recreational needs, expert consultation, and input by park users, neighbors, and the public at large. Land classifications are intended to guide park use and development over the very long-term and are formally adopted by the State Parks and Recreation Commission.

As an integral part of the land classification process, CAMP also delineates *long-term park boundaries*. The purpose of a long-term boundary is to take a holistic look at what lands, independent of ownership, might advance the conservation and/or recreation mission of a given park. This process not only considers whether a property makes a generally suitable addition, but evaluates it in relation to adjoining park uses and determines its specific role within the broader park context. Agency staff evaluate nearby private/public lands and essentially “pre-classify” them. Commission-adoption of the classifications then formally sets the purpose and intent of the acquisition.

In addition to acquisition, long-term boundary delineation also considers whether existing properties are necessary to a park’s conservation and recreation mission or whether disposal is appropriate. This evaluation follows the same holistic process as acquisition and allows agency staff to more readily conceptualize effects of disposals on the rest of the park.

Including a privately owned property in a long-term park boundary does not necessarily mean the agency wishes to purchase it. It simply means that it would be in the park’s best interest if these properties were managed in a way that complements development and operation of the park. Any of the following possibilities could apply:

The agency might:

- Seek to formalize an agreement with an adjacent property owner to advance a shared property management goal
- Solicit a conservation easement from an adjacent property owner to protect certain natural or cultural features
- Accept a donation of all or part of a private property
- Consider exchanging agency-owned property for a private property
- Consider purchase of a private property in fee

Long-term boundary decisions are intended to guide property acquisition and surplus over the long-term and are therefore adopted at the Commission level.

In contrast to land classifications and long-term boundaries, park management plans are meant to provide immediate guidance in addressing a park’s most pressing resource management issues. In order to respond to constantly changing internal and external influences, management plans are periodically revised and approval authority lies with the Deputy Director.

Since the inception of the CAMP Project in 1996, the State Parks and Recreation Commission has adopted land classifications and long-term boundaries for thirty-six parks, representing many of the agency's "flagship" parks, over half of the agency's land holdings, and the majority of park visitation. Recently, the State Parks and Recreation Commission included completion of CAMP in every state park as a primary performance measure towards completion of its Centennial 2013 Plan.

### **CAMP/Long-Term Park Boundary Development Process**

The process of classifying lands and delineating long-term park boundaries follows a standardized planning process keyed to a series of opportunities for public input and participation. The below planning steps are sometimes adapted to specific park needs, but generally include (\* indicates opportunity for public participation):

1. Form staff interdisciplinary planning team
2. Gather resource and other base information
3. Identify issues, hopes, and concerns of staff and public stakeholders\*
4. Develop classification, long-term boundary, and management options\*
5. Report planning progress to the Commission\*
6. Develop preliminary staff recommendations for classifications, long-term boundary, and management issues\*
7. Develop final staff recommendations for Commission adoption of classifications and long-term park boundaries\*
8. Commission adoption\*

Opportunities for public input are provided during formal public workshops, Commission meetings, and in response to direct mail/e-mail solicitations, survey's, and questionnaires. Interested parties are notified through a combination of notices in newspapers of record, direct mail invitations, and e-mail invitations. Standard agency procedures include direct mail notification of Legislators, Indian tribes, local planning departments, city/county councils/commissions, local staff of other state natural resource agencies, and other known park stakeholders including park neighbors and park-related organizations.

An example Commission decision package adopting land classifications and long-term park boundaries is provided in Attachment A (see page 13). An example letter notifying property owners that their property is under consideration for inclusion in a park's long-term boundary is included as Attachment B.

### **Long-Term Boundary Initiated Property Acquisitions and Disposals**

Commission adoption of CAMP and a long-term boundary for a specific park is only the beginning of the acquisition process and only represents authorization to pursue either purchase or a voluntary management agreement for included properties. If a particular property within a long-term boundary becomes available for purchase and purchase is deemed the best way to achieve the purpose for which the property was included in the long-term boundary, then staff prepares a formal Commission request for purchase authorization. These requests follow the agency's formal Commission agenda item process and include an additional opportunity for interested parties to review the proposed acquisition and to provide both written and verbal

comment directly to the Commission. Notification always includes local governments and potentially

Agency-owned properties identified for exclusion from a long-term boundary are considered as appropriate for disposal. Agency rules require a formal public hearing on the proposed action with specific requirements to notify adjacent property owners. As with acquisitions, property disposals require a separate Commission action beyond adoption of a long-term park boundary and unanimous Commission approval.

### **EVALUATING PARK PROPERTIES OUTSIDE OF CAMP**

State Parks' stand alone property evaluation tools have been formally described since at least 1981, and were in active, if informal, use before then. Staff initiates an acquisition when a proposed property appears to meet a known need. A determination of need comes from a variety of places:

- Statewide plans (such as SCORP)
- Agency plans and special reports (Green River Gorge, Ocean Beaches)
- Agency goals and objectives, strategic plan, and now the agency's Centennial 2013 Plan
- Unique needs of an individual park

Washington State Parks has a wide-ranging mission, and provides experiences from wildlife viewing in old growth forests to well-developed recreation facilities. This means that a variety of land types can be recommended for acquisition. Even with this seemingly open acceptance criteria, most of the lands investigated are not recommended for acquisition.

The agency's collective knowledge of candidate acquisitions includes inventories from a variety of sources:

- Resource databases (GIS and other sources)
- Other federal, state, and local government agencies (e.g., DNR Trust Land Transfer Program and County Conservation Futures Programs)
- Non-profit conservation organizations (e.g., TNC, TPL, and local land trusts)
- Agency staff/Field staff
- Public/Stakeholder
- Property owners/sellers

When a suggested parcel appears to match with a known need, staff completes a formal evaluation of the property. Evaluation tools have changed with time to keep up with evolving technologies (GIS) and agency management systems (e.g., land classification system, capital budget system). Current evaluation criteria consider a number of site attributes such as uniqueness, experience available to visitors, flora and fauna, and significance, among other factors.

If a parcel meets the basic criteria of having an adequate resource base to fulfill a known agency need, staff completes further tasks and reviews to assure that only the best lands are acquired. These include:

- Regional Planner develops a land use plan describing potential use(s) of the site

- Regional Manager/Planning Program Manager review site information and potential uses and recommend acquisition to executive managers
- Executive managers review site information and potential uses and recommend acquisition to the Commission
- Commission formally authorizes acquisition of the property
- Commission evaluate and prioritize acquisitions for funding through the state capital program or a variety of state and federal grant programs
- Governor and Legislature prepare state capital budget
- Interagency Committee for Outdoor Recreation evaluates and prioritizes acquisitions for state and federal grants

Only properties that pass successfully through this entire sequence of reviews are eventually acquired. This assures that public funds are used to acquire only the best, most appropriate additions to the state park system. Acquisition of new stand-alone property continues at the rate of about one major acquisition per year.



Attachment A

The Horsethief Lake - Dalles Mt Ranch Master Planning Project



Phase III – Final Recommendations  
June 2003

Approved by the Washington State Parks and Recreation Commission  
June 19, 2003

## Getting down to the hard decisions

Over the past nineteen months, Washington State Parks has engaged the public in developing a master plan for Horsethief Lake State Park and the adjoining Dalles Mountain Ranch Property. To help facilitate public input, agency staff held a series of public workshops and developed several planning documents for distribution to interested individuals and organizations. Public response to our planning efforts has continued to be very encouraging.

This document and the recommendations it contains represent State Parks staff's best effort to incorporate what we've heard from the public into a balanced, long-term plan that effectively protects the park's natural and cultural treasures while also supporting a wide variety of recreational opportunities.

### What's in this document

This document focuses on final planning recommendations developed by agency staff to guide future development and management of Horsethief Lake State Park and the adjoining Dalles Mountain Ranch property. The first section provides a brief overview of the planning process. Next, a staff recommended facilities concept plan that draws together the best ideas from previous planning stages is presented. Then, land classifications (park zoning), long-term park boundaries (desired property ownership/management), and a new park name are recommended. Finally, preliminary approaches to on-going park management issues are enumerated.

Additional information on previous planning stages can be referenced at the Horsethief Lake – Dalles Mountain Ranch project web site at <http://www.parks.wa.gov/hldmrplan.asp> and is available in hard copy format upon request.

### The planning process



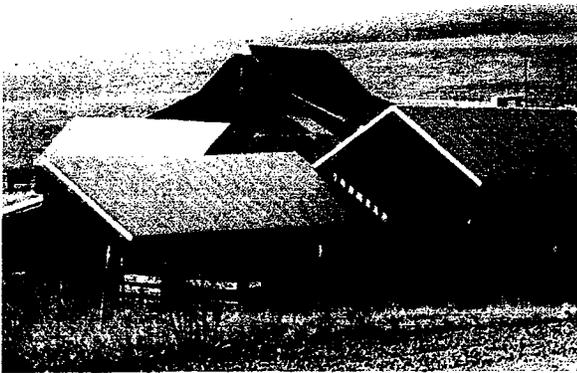
On November 8, 2001, the Horsethief Lake – Dalles Mountain Ranch Master Plan staff planning team held its first public workshop in Goldendale, WA to familiarize participants with the project and to gain insight into what issues currently face the park and, in very general terms, what features are important to park stakeholders. Using this input, the team then crafted a set of park objectives and five alternative “planning directions” to show several ways in which the park might be developed. This information was then incorporated into a formal planning document, distributed to park stakeholders, and presented for comment at a second public workshop on February 4, 2003, in Lyle, WA.

Drawing on public input received at the February workshop and through extensive outreach to interested individuals and organizations, the staff planning team then narrowed the five planning directions into a collection of preliminary recommendations with a few remaining options. The team then prepared a second planning document and distributed it to park stakeholders at a public workshop on March 26, 2003 – again in Lyle, WA.

After the March 26 public workshop, the staff planning team continued its outreach to interested individuals and organizations and has now drawn together what it believes are the best ideas into a collection of final staff recommendations (this document). Staff will present these recommendations for consideration and approval by the Washington State Parks and Recreation Commission at its scheduled June 19, 2003 meeting in Wenatchee, Washington. Interested persons are encouraged to attend this meeting and provide comment directly to the Commission on any aspect of this planning project.

## Facilities Concept Plan Recommendations

### Dalles Mountain Ranch Area



With a few exceptions, structures in the central ranch complex are considered either *contributing to* or *primary to* the historic integrity of the original Crawford ranch and surrounding cultural landscapes. Taken together the ranch, homestead sites, and agricultural fields represent an increasingly rare historic resource worthy of State and perhaps National Historic Register status. Perhaps what most sets this ranch apart from others in the region is the relatively minor degree of alteration made to its structures and landscapes

over time. Although some structures – most notably the Crawford ranch house – have now fallen into disrepair, their potential historic significance was recognized early and has in most cases been left in place. In addition, because most barns and other outbuildings remained in active use, they too have survived largely intact. Contemporary structures including the Reuter ranch house and the large “new barn” are set well away, preserving the original arrangement of structures and landscape features.

#### Central Development Concept

The site’s assemblage of barns and residences provides significant adaptable indoor space for a spectrum of opportunities ranging from a few vacation rentals to a substantial educational/recreational center with accommodations to support group day-use, overnight, and even extended programs. The park’s wide range of recreational opportunities and outstanding scenic values make it a highly desirable location for development of recreational group accommodations. At the same time, the park’s collection of and proximity to nationally significant, yet largely invisible, natural and cultural features creates an ideal opportunity for development of the ranch as a resource-related educational center.

## Key Considerations

### Historic Preservation

As indicated above, the majority of structures in the developed ranch area are historic and the assemblage is eligible for listing on the National Register of Historic Places. Rehabilitation of ranch structures to support an educational/recreational center concept appears to be possible given the size, number, and arrangement of existing structures, but additional planning will be necessary to make sure this can be done in a way that maintains historic integrity and is within reasonable financial limits.

### Economic Feasibility

As part of an earlier phase in the master planning process, staff commissioned ECONorthwest to assess economic feasibility of a set of preliminary development options (Horsethief Lake – Dalles Mountain Ranch Master Plan: Preliminary Market Analysis, May 8, 2003). Initial analysis suggests a solid demand for the entire range of development possibilities from a few vacation rentals to a full-blown “learning center” concept. In addition, the study suggests that the supply of meeting spaces with overnight accommodations in the east Gorge is low and non-existent in high-quality settings like Dalles Mountain. Staff has identified non-profit groups willing to pay for use of an education facility, though less likely to invest in facilities up front. Finally, the study asserts that a break-even educational/recreational center may be feasible provided the agency is able to engage partners from the private and non-profit sectors, create an optimal management structure (use of agency staff, private concessions, and partner organizations), and develop successful educational and recreational programming.

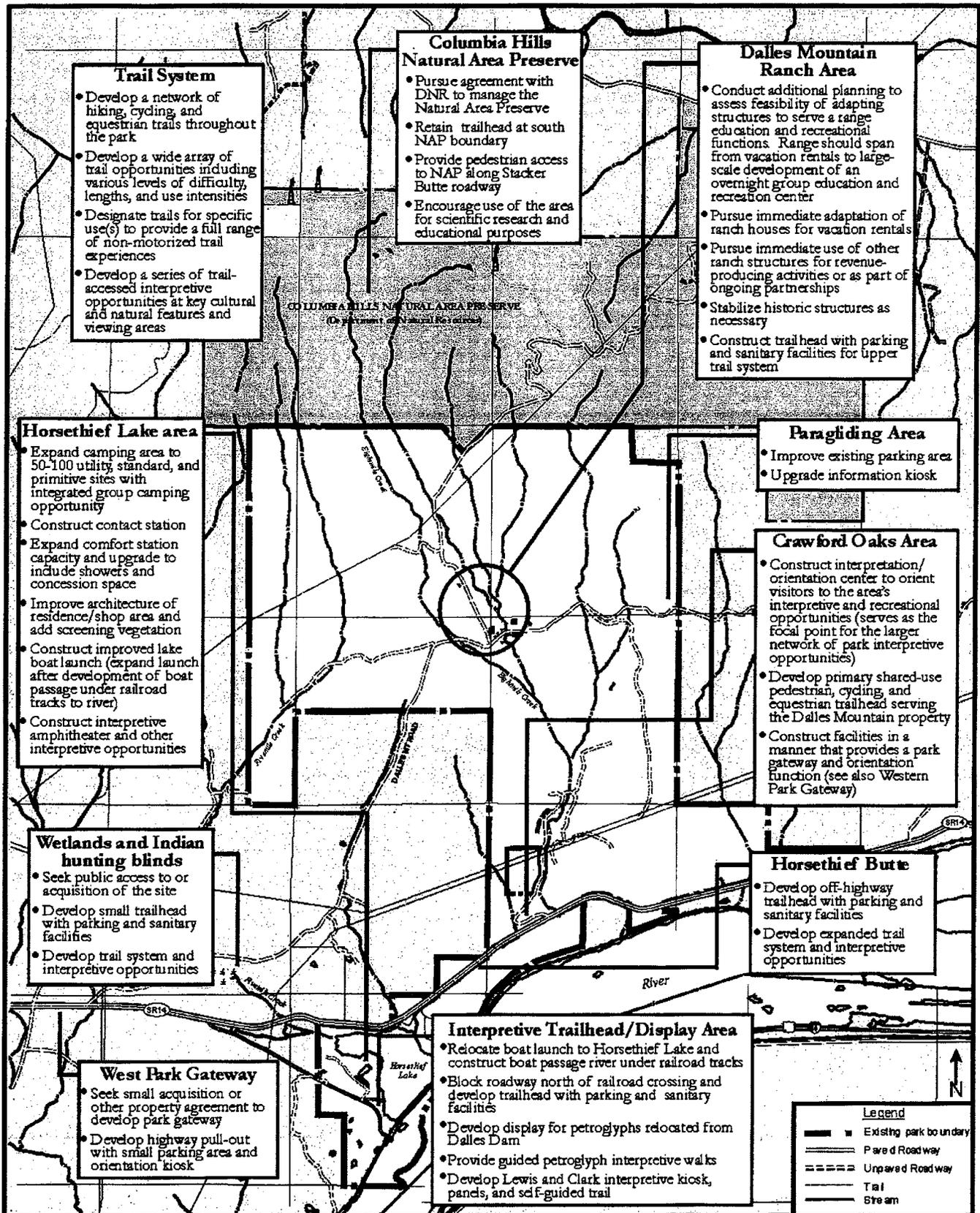
### Commission Environmental Learning Center (ELC) Policy

Staff anticipates that a statewide policy guiding development and management of ELCs in state parks will be completed in the near future. This policy should provide further direction as to the intended mission of these facilities and potentially clarify the agency’s financial expectations with regard to their ongoing operation (e.g. required to produce revenue over operating costs, break even, or operate with a subsidy).

### Recommendations (See also Figure 1)

- Conduct additional planning to assess feasibility of adapting ranch structures to serve a range of educational and recreational functions. Range should span from vacation rentals to large-scale development of an overnight group education and recreation center.
- Pursue immediate adaptation of ranch houses for use as vacation rentals and use of other ranch structures for revenue-producing or partnerships opportunities. Uses should not however commit the agency to specific development path or otherwise limit future development options.
- Pursue measures to stabilize historic structures as necessary.

Figure 1: Staff Recommended Facilities Concept Plan



### Possible Configuration of Ranch Structures for Educational Purposes

As part of the current planning process, staff has developed potential uses for ranch structures and suggested additional structures necessary to develop the ranch complex for use as an educational or recreational center. These uses are not specifically recommended at this time, but are intended to provide an example of how a center might potentially be configured.

Specific uses for the ranch structures at Dalles Mountain could ultimately include:

- Rehabilitation of historic barns and outbuildings south of Dalles Mountain Road to serve as classroom/meeting spaces, food preparation/eating area, and restrooms
- Adaptation of the Reuter ranch house to serve as lodging/dining facility
- Rehabilitation of the Crawford ranch house for lodging
- Adaptation of machine shed structure to serve as administrative/volunteer support space
- Rehabilitation of ranch shop building to serve as small ranch museum
- Adaptation of the large contemporary barn for park maintenance/administrative use and administrative space for partner organizations
- Construction of a new sensitively sited residence to house park staff

### Crawford Oaks Area



The Crawford Oaks area is located along the north side of SR-14, about halfway through the park. Basalt cliffs and talus surround a flat area forming a v-shaped pocket immediately north of the highway. An existing roadway (inactive county landfill access) bridges several cliff bands creating a passage from highway elevation up to the more gentle rolling hills above. Eightmile Creek winds through the site creating an impressive waterfall over the basalt cliffs and then feeding an oasis-like grove of maple and oak trees below. Portions of the area, particularly west of the creek, have been significantly disturbed

through road construction and provide a good opportunity for recreational development with far less overall impact to natural and cultural resources. Additionally, the site's topography and abundance of screening vegetation make it possible to develop facilities with relatively minimal visual impacts when viewed from surrounding areas.

### Central Development Concepts

1. The site's proximity to SR-14, central location within the park, and attractive setting make it an excellent location for development of a facility that provides a first point of visitor contact, park information, and orientation to the area's wide assortment of recreational and interpretive opportunities (park portal or gateway).
2. The area's location at the lowest elevation of the Dalles Mountain property and passage to the ranch areas above make it an ideal site for the park's primary shared-use trailhead.

## Key Considerations

### Orientation and Interpretation Needs

Because of the park's relatively large size, multiple access points, and somewhat confusing roadway system, a central orientation facility is necessary to direct first-time visitors to the various activity centers in the park. Scale of such a facility has not been determined and could range from a simple enclosed display area to a multi-room, full-service center (likely less than 5,000 square feet). Some of the most culturally significant features in the park are Native American archaeological sites, hunting sites, and petroglyphs. Most of these features are invisible to park visitors and should remain that way to ensure long-term protection. To provide the public with "access" to these resources, development of a centralized, yet nearby interpretive facility is necessary. Other historically significant features associated with 19<sup>th</sup> Century pioneer settlement are also largely invisible to the uninitiated eye. These include agriculture-related cultural landscape features including the agricultural fields themselves, historic military and stagecoach roadway alignments, remains of homestead sites, and small-scale features like developed springs and early fencing. Interpretation of these features is also most effectively done through an initial introduction at a central facility that in turn directs visitors to actual sites throughout the park.

### Economic Feasibility of Orientation/Interpretive Facility

Interpretive centers are often costly to operate. Larger centers can sometimes offset a portion of their operating costs through food/beverage services and sale of merchandise. Preliminary economic analysis indicates that a center of the scale likely at the Crawford Oaks might generate revenue in gift shop sales, but would not receive visitation necessary to generate revenue from food sales and would probably run at a loss. Operation of a center in partnership with non-profit and/or private organizations would likely reduce costs, as would limiting the size of the structure and the extent of amenities. Although the orientation/interpretive facility would not be revenue generating, its role in enhancing the usability of the park justifies its cost.

### Shared-Use Trailhead Development

Clustering a shared-use trailhead near the proposed orientation/interpretive facility would reduce potential impacts to natural and cultural features, achieve development economies, and maximize ongoing management efficiency. Siting trailheads at the low point of elevation is generally preferred by trail users and discourages potentially incompatible trail uses such as "downhill mountain biking." Locating the trailhead in close proximity to SR-14 also minimizes vehicular use of the unpaved, County-owned Dalles Mountain Road by park visitors.

### Viewshed Protection

The location of the park in the Columbia River Gorge National Scenic Area requires that developments in key viewing areas, including SR-14 and the Columbia River, appear visually subordinate to the surrounding landscape. The area's topography and vegetation provide significant visual screening for potential development, but are also important natural features in their own right. These features, such as Eightmile Creek, biologically significant maple and oak trees, and riparian habitat, also require protection. The Crawford Oaks site's natural features and proximity to SR-14

will require highly creative and sensitive architectural and landscape design in order to accommodate development of recreational facilities.

#### Traffic Safety

SR-14 is heavily used by commercial trucks and vehicles at high speeds. Development of the Crawford Oaks area will require design and construction of a new entrance route to the site to ensure safe access off and onto SR-14.

#### Recommendations

- Develop an orientation/interpretive facility at the Crawford Oaks area to orient visitors to park/region's recreational and interpretive opportunities (serves as eastern park gateway).
- Develop primary trailhead at the Crawford Oaks area to access the park's multi-use hiking, cycling, and equestrian trail network. This trailhead should include sanitary facilities, an orientation kiosk, and adequate parking for single vehicles and vehicle-trailer combinations.

#### Horsethief Lake Area



Developed areas of Horsethief Lake currently include a sixteen-site campground with a combination of utility, non-utility, and walk-in/bike-in sites. A developed day-use area is made up of a single large parking area, formal picnic area, restroom (without showers), and small interpretive display. A boat launch for Horsethief Lake includes a single ramp, parking area, and fish cleaning station. What was once a paved roadway into Collowesh Bottom now serves as a separate boat launch into the now raised Lake Celilo (Columbia River). A small administrative area, located along

the park entrance roadway, includes a staff residence and shop structure – part of which serves as the park office. In addition to providing a convenient emergency contact point for park visitors, the 24-hour presence afforded by the staff residence also serves an important surveillance function to protect the park's important cultural features.

#### Central Development Concepts

1. Existing high-intensity development of the Horsethief Lake area makes the site a logical choice for development of upgraded and expanded recreational facilities.
2. Concerns regarding safety of the park's existing boat launch and unmet demand for specific types of amenities calls for wholesale redesign and development of an alternative launch site in the park.
3. The area's nationally significant petroglyphs and other cultural features, as well as the pending return of additional petroglyphs current stored at Dalles Dam, provide tremendous opportunities for interpretation.

## Key Considerations

### Campground Expansion

The preliminary economic study indicates a current shortage of developed campgrounds with utility sites and showers in the east Columbia River Gorge. Upgraded facilities and the development of new recreational attractions in the park and region are expected to significantly expand campground use. Such expanded camping opportunities can be provided with minimal additional staff, resulting in significant revenue gains for the park. Finally, expanding existing recreational facilities and focusing high-intensity use and development is generally less disruptive to natural systems and cultural features.

### Boat Launch Relocation

Construction of an upgraded and expanded boat launch into Horsethief Lake along with development of a boat passage under the railroad tracks into Lake Celilo appears to resolve long-standing concerns about visitor safety and protection of cultural resources while providing opportunities to satisfy unmet demand for upgraded launch facilities and ancillary amenities.

The configuration of the existing launch ramp at Lake Celilo (stretch of the Columbia River above the Dalles Dam) presents significant railroad safety concerns. Launching activity necessitates crossing of railroad tracks "at-grade" at least twice and, in the case of larger boats, three or four times and sometimes while backing up. Furthermore, the existing boat ramp is very near to numerous rare and sensitive cultural features. Relocating this use would afford increased protection from vandalism and other non-designated activities.

Additionally, while there are a number of other boat launch facilities serving Lake Celilo only the Maryhill State Park launch offers nearby showers and none provides wash down areas or access to concessions (food and beverage and fishing/camping supplies).

### Administrative Facilities

The current configuration and architecture of the shop facility and residence create significant visual intrusion into the landscape as seen from SR-14 and other areas of the park. Nonetheless, the current location of the staff residence provides valuable security for park visitors and sensitive cultural resources. In addition, the shop/maintenance structures should remain near the park's campground and day-use areas for most efficient use.

Increased levels of park day-use and camping activity associated with expanded recreational opportunities and attractions will require a greater amount of fee collection and processing of camping reservations by park staff. Use of staffed visitor contact stations significantly increase compliance with payment of fees, speeds up camper check-in, and provides a centralized administrative space for processing and securing fees collected throughout the park.

### Interpretive Trailhead/Display

Regional Tribes are currently working with the US Army Corps of Engineers, the underlying owners of the Horsethief Lake property, to return petroglyphs previously removed from Petroglyph Canyon

(area now submerged under Horsethief Lake) and currently stored at Dalles Dam. The new display area is located along the Lake Celilo boat launch access road near the primary assemblage of petroglyphs left in-place. Under an agreement between State Parks and area Tribes, park staff provides limited guided tours of the petroglyphs to the public on Friday's and Saturdays. Parking is now provided in an informal lot without sanitary facilities.

Relocation of the Lake Celilo boat launch allows the launch road to be terminated well away from sensitive cultural resources and provides an opportunity to develop the area exclusively for interpretive purposes. In addition to display of the relocated petroglyphs, the site could be developed as a more formal trailhead to support guided petroglyph tours as well as other self-guided interpretive opportunities in less sensitive areas nearby.

### Recommendation

- Expand camping to about 50-100 utility and standard sites.
- Construct group campsite (convertible to use as overflow campsites).
- Upgrade and expand comfort station to include showers and attached concession space.
- Construct new contact station near residence/shop area.
- Improve architecture, configuration, and building materials of residence and shop/office complex and enhanced vegetation screening.
- Remove existing Lake Celilo boat launch and develop upgraded and expanded launch into Horsethief Lake concurrent with development of a boat passage under railroad tracks to Lake Celilo.
- Terminate existing river access roadway well north of railroad crossing and construct interpretive trailhead with restroom, orientation kiosk, and parking for petroglyph tours and other interpretive opportunities.
- Construct petroglyph display area for petroglyphs relocated from Dalles Dam.
- Construct amphitheater, self-guided interpretive trail, and series of interpretive kiosks and panels as determined in the park's interpretive master plan.

### **Trail System and Trailheads**



At present, trail activities at Horsethief Lake and the Dalles Mountain Ranch area are only marginally supported by existing facilities. Current trailhead development at the Dalles Mountain property is limited to informal parking at the ranch building cluster, the small parking area south of the Columbia Hills NAP, and at the paragliding parking area near the eastern park boundary. Pedestrian activity in these areas is limited to roads and overland use.

The Horsethief Butte area offers a single loop trail around the Butte itself, but a visitor's only access to this opportunity is by parking along the SR-14 road shoulder.

### Central Development Concepts

1. The veritable absence of existing trails provides a rare opportunity to consciously design a network of non-motorized trails that provides a wide diversity of experiences, avoids potential conflicts between use types, and also protects resources.
2. The park's relatively large size and configuration call for development of several trailheads with a range of parking and sanitary support facilities.

### Key Considerations

#### Trail System

The overall goal is to provide a diversity of opportunities ranging for low intensity pedestrian trails and overland experiences to higher intensity shared use hiking, cycling, and equestrian opportunities. The agency's statewide trails policy encourages development of cycling and equestrian opportunities in larger parks. Cycling and equestrian use should not necessarily be linked together on all shared-use trails. Shared pedestrian/cycling and pedestrian/equestrian opportunities should also be explored. The subtlety and diversity of park resources calls for development of formal interpretive trails (limited to pedestrian use as per agency policy).

#### Trail-Accessed Interpretive Opportunities

The park's diverse yet largely open landscapes and assemblage of less than obvious natural and cultural features lend themselves to wandering and discovery of the all but hidden treasures. Interpretive opportunities should keep in mind the spirit of discovery, remaining subtle and inquisitive instead of spoon feeding information to visitors.

#### Trailhead Location and Amenities (see also Shared-Use Trail Development, page 8)

Locating a shared-use trailhead at the Crawford Oaks area in close proximity to SR-14 will limit additional vehicular use of the unpaved Dalles Mountain roadway by the majority of trail users. Siting shared-use trailheads at the low point of elevation is generally preferred by trail users and discourages potentially incompatible trail uses such as "downhill mountain biking." The park's large size and configuration require additional smaller trailheads to provide reasonable access to specific attractions (e.g., hunting blind site) and particular activities (e.g., paragliding area and rock climbing at Horsethief Butte). Off-highway trailhead parking is needed at Horsethief Butte area to address safety concerns. Permanent sanitary facilities are also needed at various trailheads. These may be phased in as need is demonstrated over time.

### Recommendation

- Construct a network of hiking, cycling, equestrian, and interpretive trails throughout the park.
- Develop a wide array of trail opportunities including various levels of difficulty, lengths, and use intensities.
- Designate trails for specific use(s) to provide a full range of non-motorized trail experiences.
- Develop a series of trail-accessed interpretive opportunities at key cultural and natural features and viewing areas.
- Develop the park's primary shared-use trailhead at the Crawford Oaks area.

- Improve existing and develop additional trailhead facilities at Horsethief Butte, paragliding site, north of the Reuter ranch house, Natural Area Preserve boundary, and at the wetlands/hunting blinds site.

#### ☐ Park Gateways



The addition of the Dalles Mountain Ranch property to Horsethief Lake State Park has brought new challenges in orienting and directing park visitors to the many new opportunities the park now offers. Entering the park from the west presents a particular difficulty. By the time motorists realize they are in the park, they have already missed the turnoff to the Dalles Mountain Ranch property – that is if they knew about the area in the first place. Clearly, improving directional signing along SR-14 before the Dalles Mountain

turnoff is a much-needed improvement. Park orientation improvements are also necessary to better direct visitors traveling from the east.

#### Central Development Concept

Lack of a single entrance to the park and confusing external roadway configuration necessitates development of prominent first points of visitor contact (gateways) where visitors can be oriented and directed to main activity areas.

#### Key Considerations

##### Highway Safety

SR-14 is a 60 MPH highway heavily used for commercial trucking. It bisects the two principal park areas: Horsethief Lake and the Dalles Mountain Ranch property. Several hills and curves also conspire to shorten sight distances along several portions of the highway as it runs through the park. Safety concerns arise when fast moving trucks are mixed with slower moving park-related traffic – principally recreational vehicles – entering and exiting the highway to and from the park. A lack of signage and resulting uncertainty by park visitors leads to frequent wrong turns, u-turns, and backtracking.

Development of well-signed highway pullouts (gateways) before or in conjunction with the first route selection point could significantly enhance highway safety by “capturing” first-time park visitors, informing them about the types of opportunities the park offers, and directing them to their chosen destination. A modest pullout should afford safe access to and from the highway, a parking area that can accommodate one or two buses in addition to several vehicles, and an orientation kiosk. A gateway should be provided for vehicles traveling both east and westbound on SR-14; however, it appears that the proposed orientation/interpretive facility development at Crawford Oaks could fulfill this gateway function for westbound vehicles.

## Visitor Orientation

Because the park does not have a single point of entry, encompasses a large area, and includes a wide array of recreational and interpretive opportunities, it is often difficult for visitors to know where to go to find the particular types of opportunities that most interest them or the ones they have adequate time to enjoy. Providing extensive orientation at a park gateway essentially links visitors with the opportunities that best suit their individual needs, significantly enhancing their enjoyment of the park. Still, park gateways should be part of a broader network of orientation. This network should begin before visitors leave their home through information made available on-line and through brochures, link to park gateways, and finally link to on-site orientation at trailheads and other activity centers.

### Recommendation

- Acquire property and construct SR-14 highway pullout west of Dalles Mountain Road intersection to orient first-time visitors to main park activity centers. This pullout should be able to accommodate vehicles, vehicle-trailer combinations, and buses.
- Construct proposed development at Crawford Oaks area in a manner that provides the same gateway function for vehicles entering the park from the east.

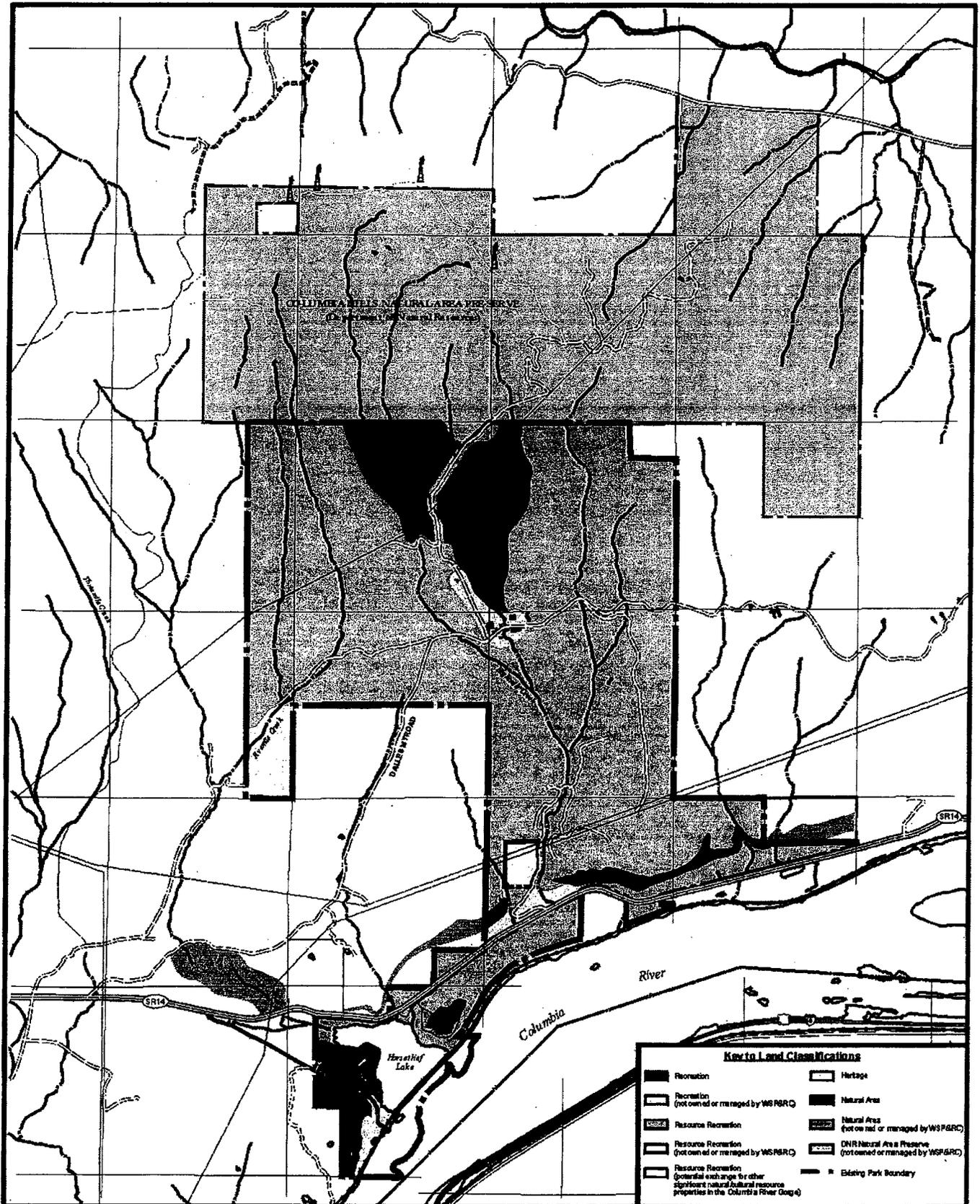
## Land Classification Recommendations

An important part of planning for the Horsethief Lake – Dalles Mountain Ranch area involves the zoning or classification of park lands. State Parks has developed a system of six land classifications. When assigned to a specific area within a park, each classification sets an appropriate intensity for recreational activity and development of facilities. Classifications are aligned along a spectrum ranging from low to high-intensity recreational uses and developments. By classifying park lands, the agency is able to consciously strike a balance between protecting park resources and providing an appropriate variety of recreational opportunities to park visitors.

The agency's land classification system includes six classifications: Natural Area Preserves, Natural/Natural Forest Areas, Resource Recreation Areas, Recreation Areas, and Heritage Areas. Detailed definitions of each land classification are available from the agency on request. Through critical analysis of natural and cultural resource inventories and evaluation of future recreational facilities needs, staff recommends that park lands be classified as a combination of Natural, Heritage, Recreation, and Resource Recreation Areas (Figure 2).

Staff recommends classification of areas known or likely to support rare or sensitive native plant communities as well as those providing important wildlife habitats as Natural Areas. These areas generally include wetlands, riparian areas, cliffs, talus, vernal ponds, oak groves, and sensitive native grassland associations. The Natural Area designation is intended to strongly emphasize protection and enhancement of natural plant and animal communities and identifies areas for more intensive management attention. The designation affords protection to these areas by specifically limiting recreational use to pedestrian activities and likewise limiting development to trails and modest interpretive/directional signing.

Figure 2: Staff Recommended Land Classifications and Long-Term Park Boundary



Staff recommends classification of areas of known historical significance as well as areas intended for development of extensive interpretative facilities as Heritage Areas. These areas include the Dalles Mountain Ranch development and the site of the proposed park interpretive center at Crawford Oaks. While the Dalles Mountain Ranch development contains both historic and non-historic structures, the Heritage classification has been applied to the entire site to emphasize protection of historic resources and to support its intended use for education, interpretation, and enjoyment of the park's cultural and natural features. The Crawford Oaks area, while considered part of the park's broader cultural landscape, is principally recommended for Heritage classification in recognition of its intended role as an interpretive gateway to the rest of the park. This classification is intended to allow for development of the park's interpretive center and shared-use trailhead while recognizing the importance of the site's cultural and natural features and affording them as much protection as possible.

The park contains a nationally significant assemblage of Native American archaeological and other culturally important sites. Staff recommends protecting these resources by keeping them largely hidden, with the principal exception of in-place petroglyphs, including "she who watches." A Heritage classification for this site appears warranted given that the location of these features is already widely known and that the site is considered, by agreement with regional Native American Tribes, appropriate for highly controlled public interpretation.

Staff recommends classifying the Horsethief Lake developed campground, day-use area, and administrative area as a Recreation Area. This classification is intended to emphasize recreational use and enjoyment of this highly developed recreational landscape. Classification in this manner also serves to focus high-intensity recreational use in an existing developed area and, indirectly, affords a higher degree of protection to other undeveloped areas of the park.

Finally, staff recommends classifying the balance of the park as Resource Recreation Area. The purpose of this mid-intensity classification is to provide higher intensity recreational opportunities (shared-use hiking, cycling, and equestrian trails), but only to the extent that the long-term integrity of natural and cultural landscape features is not compromised. This classification recognizes that the quality of natural and cultural resources is what makes these areas attractive to recreate in and consequently seeks to balance recreational use with appropriate levels of resource protection. Staff recommended Resource Recreation Areas generally include agricultural fields, timber cultures, historic homesites, as well as other historic and ethnographically significant cultural landscapes. Use and development of these areas is generally limited to shared-use hiking, cycling, and equestrian trails and supporting trailhead facilities, roadways, minor picnic sites, and interpretive facilities. Indoor opportunities are not permitted in Resource Recreation areas.

## **Long-Term Park Boundary Recommendation**

Delineation of long-term park boundaries is a relatively new and often misunderstood aspect of park planning. In short, the purpose of a long-term boundary is to take a big picture look at what lands, independent of ownership, might advance the conservation and recreation mission of the park. This process not only considers whether an adjoining property would make a suitable addition, but also considers whether agency-owned property should be retained or might appropriately be considered surplus to park needs. Including a privately owned property in a long-term boundary does not necessarily mean the agency wants to purchase it. It simply means that it would be in the park's best

interest if the property were managed/maintained in a condition that complements development and operation of the park. Any of the following possibilities could apply:

The agency might

- Seek to formalize an agreement with an adjacent property owner to advance a shared property management goal
- Solicit a conservation easement from an adjacent property owner to protect certain natural or cultural features
- Readily accept a donation of all or part of a private property
- Consider exchanging agency-owned property for a private property
- Consider purchase of a private property in fee

Through the planning process, staff has developed two starkly differing long-term boundaries for the Horsethief Lake – Dalles Mountain Ranch area. Figure 2 represents staff's recommended long-term boundary while Figure 3 represents an alternative that was considered but not ultimately recommended. Lighter shaded colors in the figures indicate properties that are not owned by the agency but are desirable for long-term boundary inclusion. The lighter and darker shaded areas together represent the long-term park boundary in each option.

Staff's recommended long-term boundary was delineated under the assumption that maintaining large tracts of land in state parks ownership furthers both the conservation and recreation mission of the park by providing large-scale protection to natural and cultural resources while providing recreational opportunities of regional and statewide significance. The recommended long-term boundary seeks only minor acquisition of private property in pursuit of this mission while emphasizing property exchanges and development of on-going management agreements to simplify management and enhance visitor experience.

Specifically, lands within the recommended long-term boundary include:

- 80-acre DNR property at the east park boundary (acquisition through Trust Land Transfer Program)
- 80-acre Shriner property a.k.a. wetlands/hunting blind site (acquisition or use agreement)
- 120 acres of USFS property (management agreement)
- Private and Tribal allotment properties along north side of SR-14 and west of Horsethief Lake area (voluntary resource and viewshed protection agreements)
- Small amount of property along SR-14 west of Dalles Mountain Road to locate west park gateway (acquisition or use agreement)

Agency-owned lands not within the recommended long-term boundary include:

- Approximately 60 acres of agency-owned property south of Fivemile Creek along the western park boundary near the Brune homestead site

Additionally, staff recommends the agency seek an agreement to manage the adjacent 2,800-acre DNR Columbia Hills Natural Area Preserve (NAP) for the Department of Natural Resources. Assumption of management responsibility for this property would achieve significant staffing economies (site is currently managed from DNR's Ellensburg regional office) and enhance on-site protection of rare native plant communities and wildlife habitat.

#### Advantages of recommended long-term boundary:

- Protects in perpetuity historically significant, large-scale cultural landscapes associated with the Dalles Mountain Ranch
- Retains archaeological sites and historic ruins associated with the entire collection of original 19<sup>th</sup> Century homesteads ultimately incorporated into Dalles Mountain Ranch
- Conserves a widely buffered natural resource corridor extending from the Columbia River to the crest of the Columbia Hills in perpetuity
- Retains public access to one of only three paragliding sites in the Columbia River Gorge
- Retains regionally significant shared-use pedestrian, cycling, and equestrian trail opportunities
- Retains interpretive and educational opportunities associated with contemporary agricultural use of the park.

### Long-Term Park Boundary Alternative

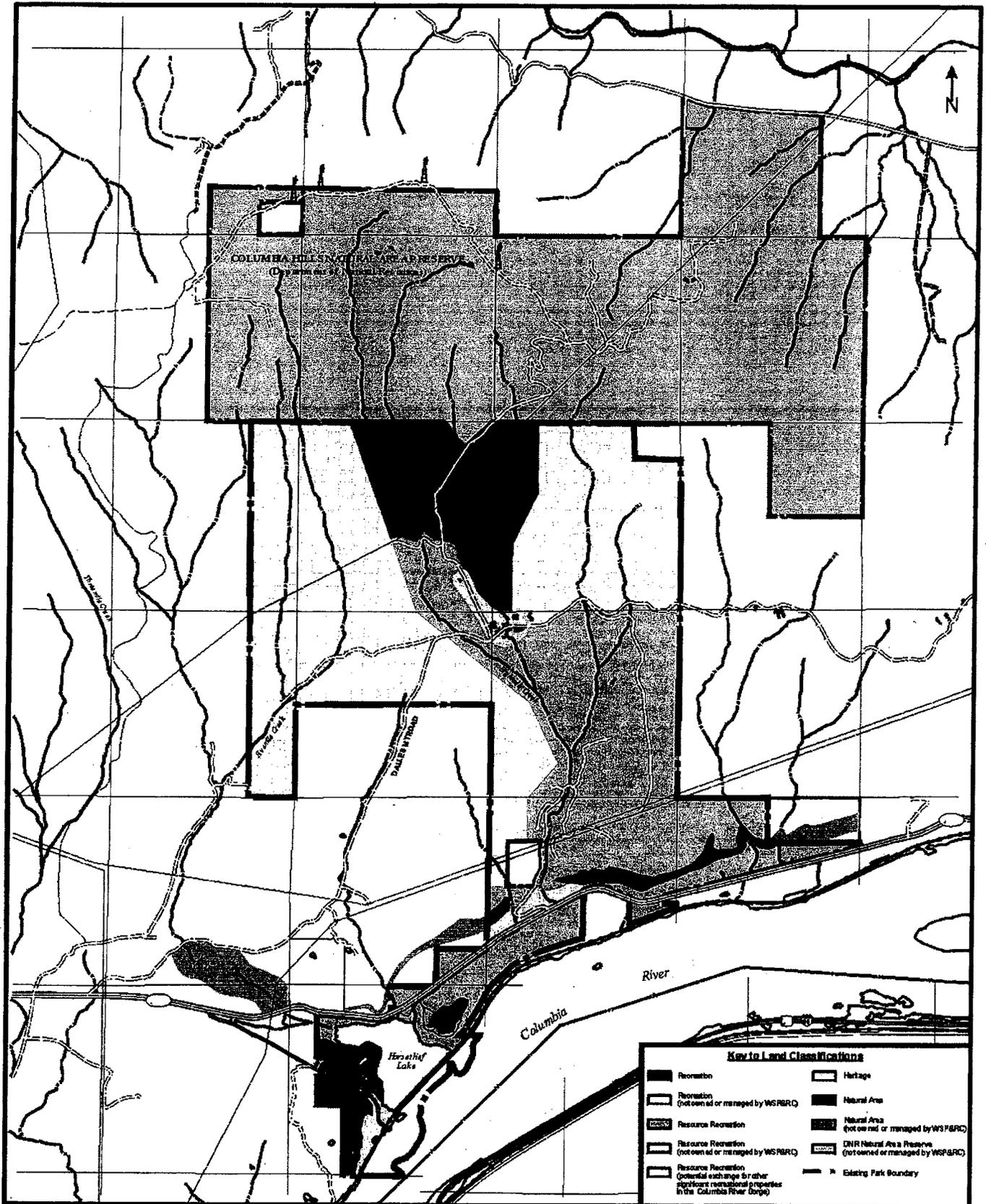
Through the planning process, staff developed an alternative long-term boundary that represents a radical departure from existing land ownership, particularly at the Dalles Mountain Ranch property (Figure 3). This long-term boundary scheme assumes that retention of large tracts of agricultural fields in state ownership is not essential for long-term conservation of cultural landscapes, natural resource corridors, or to maintain a legitimate state park experience. Consequently, large portions of the property are considered surplus and made available to exchange with other properties in the region, potentially with more conventional recreational value. The alternative retains a minimalist approach to recreation and presumes that cultural and natural resource features can be adequately protected in private ownership through deed reservations and other restrictive covenants. The alternative also presumes that some amount of public access can be retained in a similar fashion.

Specifically, the alternative long-term boundary would:

- Maintain a contiguous conservation corridor from the shores of the Columbia River along Eightmile Creek to the Columbia Hills Natural Area Preserve
- Protect a central core of rare native plant communities and important wildlife habitat
- Preserve at least a portion of the park's historic homestead sites, cultural landscapes, and other cultural features
- Protect areas most likely to contain archeological sites – both Native American and pioneer settlement-related
- Provide a range of recreational opportunities comparable to that offered in staff's recommendation

Several factors have led staff not to endorse the alternative long-term boundary scheme. First, the historic Brune homesite, consisting of a collection of building foundations, developed landscape, and a nearby timber culture, would not be retained in park ownership. Public access and protection of the site could conceivably be retained through deed restrictions and reservations, but these restrictions are often difficult to enforce and ultimately management control would likely be lost.

Figure 3: Alternative Long-Term Park Boundary



Second, protection of the visual appearance of surplus agricultural fields might significantly change under private operation. Again, deed restrictions might limit use to agricultural purposes, but long-term management may or may not retain an historically authentic appearance thereby compromising the area's historic integrity.

Third, it is unrealistic to expect that a comparable level of recreational access to these lands while in active agricultural production can or should be retained. Loss of park lands would limit recreational use and development – principally shared-use pedestrian, cycling, and equestrian trails – to a much smaller area, resulting in higher use densities and diminished opportunities for solitude experiences.

Finally, it is important to note that the state funding sources used to purchase Dalles Mountain Ranch (Washington Wildlife and Recreation Program Habitat Protection Grant) carry with them stringent requirements directing the conditions under which lands can be “converted” to other uses. That is, any lands declared surplus to park needs would require replacement with other nearby lands of equal or greater value and with like natural habitat features. Finding available replacement lands that meet these requirements may prove difficult. Replacement of the park's one-of-a-kind cultural features is impossible.

## **Park Naming Recommendations**

The Horsethief Lake and Dalles Mountain Ranch areas pose an unusual naming challenge. The State Parks and Recreation Commission originally named the 350-acre Horsethief Lake State Park in 1964 in recognition of the park's dominant water feature (the lake created by construction of the Dalles Dam and railroad line was originally named by Army Corps of Engineers surveyors in the early 50's). However, with acquisition of the Dalles Mountain Ranch property in 1993, park holdings have expanded more than tenfold to encompass a contiguous block of almost 4,000 acres. To many, the name Horsethief Lake State Park no longer accurately describes the park's geographical context nor does it adequately capture the essence of its outstanding natural or cultural features. The name Dalles Mountain Ranch also fails in these regards. The entire property is a single contiguous park, deserving of one overarching identity.

Selecting a name for a new park or re-naming an existing park is often a difficult and emotionally charged process. The Washington State Parks and Recreation Commission, having frequently wrestled with the complexities of naming, in 1978 adopted a park naming policy. Applicable portions direct that, “In naming of sites, priority shall be given to geographic locations, historic significance or geologic features.” In 1995, the Commission adopted additional rules requiring that an official park name “...generally include in it the term ‘state park’.”

In order to adequately recognize the park's large size, diversity of geography, previous inhabitants, and its relation to various historical persons and events, staff suggests that the park have one overall name, but that areas and facilities within the park be named as well. That is, one overarching name with separate site names within. For example, ABC State Park – Jane Doe Area. Additionally, names of sites may reflect their dominant land classifications. For example, the ABC State Park – Jane Doe Heritage Area or ABC State Park John Doe Recreation Area.

No clear favorite park-wide name emerged from the planning process. Nor did Staff of regional Native American Tribes come to any formal naming suggestions. The table below lists a number of names suggested by planning participants and how each might fit into an overall naming structure.

<u>Whole Park Names</u>	<u>Horsethief Lake Site Names</u>	<u>Dalles Mt Ranch Site Names</u>
Klickitats State Park	Horsethief Lake Recreation Area	Crawford Ranch Heritage Area
Nixluidix State Park	Collowesh Bottom Area or Spedis Area	Some Native American name related to the Dalles Mountain area
Columbia Hills State Park	Five Mile Rapids Area or Long Narrows Area or Petroglyph Canyon Area	Dalles Mountain Area or Klickitats Area

Staff recommends that Horsethief Lake State Park and the adjoining Dalles Mountain Ranch property be named “Columbia Hills State Park.” This name broadly incorporates the park’s dominant geographic features (Columbia River and the hills rising from it), builds upon previous naming of the adjacent DNR Columbia Hills Natural Area Preserve, has a nice ring, and leaves room for the addition of specific area/facility names without becoming overly complicated. Staff also recommends that it continue to work with regional Native American Tribes and other interested individuals to name specific areas and facilities within the park as part of future design processes and site dedications.

### **Park Management Issues and Preliminary Approaches**

The table below is a listing of park management issues identified through the public planning process for the Horsethief Lake – Dalles Mountain Ranch area. For each issue, the planning team has outlined a preliminary management approach describing how these issues might be addressed. This information will ultimately form the basis of the park’s management plan, but should be considered preliminary at this time and is provided here solely as supporting information.

<b>Natural Resources</b>	
<b>Issue</b>	<b>Preliminary Management Approach</b>
Protection of wildlife habitat	<p>East Region Stewardship and Headquarters Stewardship will work with WDFW to conduct habitat and wildlife inventories for the park. The result of the data collection will be the formulation of a habitat management plan for wildlife in the park, as well as any threatened and endangered species identified in the inventories.</p> <p>Management of the Rattlesnake den will occur if problems arise from the public being in the area. Management actions will be in accordance with agency policy on Nuisance Wildlife Management.</p>
Protection of natural plant communities	<p>State Parks Stewardship staff has been working with DNR Natural Heritage program to inventory and monitor sensitive plant populations at Dalles Mountain Ranch. In addition to these inventories, an inventory of critical habitat areas, and a survey of plant relationships in the park should be conducted.</p> <p>Park staff, Eastern Region Stewardship, and HQ stewardship will seek advice from DNR Natural Heritage Program, Native Plant Society of Washington, and other interested parties to formulate a vegetation management plan for the park. The vegetation management plan should, at a minimum, address the following topics: 1) sensitive plant species / habitat (e.g., vernal pools), 2) noxious weeds (see below), 3) critical habitat protection (including vegetation community / habitat connectivity with the DNR Columbia Hills NAP), 4) riparian area protection, and 5) identification of areas where grazing may be appropriate.</p>
Grazing	<p>State Parks recognizes that grazing is an important cultural aspect of the DMR area. Agency staff also recognize that grazing may, if not carefully managed, degrade the quality of the site's natural resources. Prior to a decision to reestablish grazing at the DMR, a grazing plan will be developed that is in compliance with the agency Grazing Policy (65-87-1) and promotes the conservation and restoration of native plant communities. Interested stakeholders, including but not limited to DNR, WDFW, NRCS, WSU, local ranchers, and other interested parties, will be invited to participate in the planning process. In the development of a grazing plan, staff should consider managing the property in cooperation with local ranchers and higher education organizations for the purposes noted above. A grazing plan should also consider the significance of the area's cultural landscapes and seek to preserve their integrity as per the agency's Cultural Resource Management Policy (12-98-1).</p>
Control of noxious weeds	<p>Park staff and Eastern Region Stewardship staff should coordinate with the Klickitat County Weed Board to establish an Integrated Pest Management plan for the park. Such a plan will be formulated in accordance with state laws and agency directives (99-3) associated with integrated pest management.</p>
Fencing	<p>Maintenance and repair responsibility of boundary fencing and internal fence lines will be conducted in accordance with Commission Policy on park fencing (72-98-1). Fences within the park should be evaluated as to their cultural landscape/interpretive value, impacts to wildlife and aesthetics, and be included in the park-wide interpretive plan (see below) when appropriate.</p>
Prevention and suppression of wildfires	<p>Park staff and East Region Stewardship staff will work with DNR and local fire districts to develop a wildfire response plan for the DMR/HTL/Columbia Hills NAP area. The use of prescribed burns may be explored as part of natural vegetation management.</p>

<b>Cultural Resources</b>	
<b>Issue</b>	<b>Preliminary Management Approach</b>
Protection of historic landscapes and structures	Agency staff intends to develop a Cultural Resource Management Plan for the Horsethief Lake – Dalles Mt Ranch area in concert with master planning and other more detailed planning for development of the Dalles Mountain Ranch Area. A cultural resource inventory (archeology, cultural landscapes, historic structures, and small-scale features) has already been completed for this area. Coupled with the results of park master planning this information will form the basis of the park’s cultural resource management plan. Once established, management of cultural and historic resources will follow prescriptions set forth in this plan. Until a final plan is approved, treatment of historic properties and cultural landscapes should be limited to stabilization measures only.
Protection of Native American archaeological resources and cultural sites	As part of the Cultural Resource Management Plan for the area, treatments for the appropriate protection of archaeological resources and cultural sites will be developed in cooperation with Tribal officials. Similar to historic landscapes and structures, prior to development of a cultural resource management plan, any treatment measures should be limited to stabilization measures only. Agency staff will also continue to solicit input and cooperation during park master planning now underway and future park planning and development activities.
Coordination with interested Native American Tribes	State Parks recognizes the cultural and spiritual importance the DMR/HTL area has to the region’s Native Americans. Agency staff will continue to solicit input and cooperation from interested Tribes during park master planning activities currently underway. Subsequent planning and development activities may require formal Tribal consultation to help guide appropriate protection of cultural and archaeological resources. Agency staff will continue to work with Tribal staff to follow accepted protocol to determine if/when such formal consultation should be undertaken.  Agency staff will also seek to form on-going partnerships with Tribal staff and Tribal members to develop programs and materials for use in the park’s interpretive efforts.
Collection of park-related oral histories	As part of park-wide cultural resource management planning and interpretive planning, oral histories and stories associated with the DMR/HTL area should be collected and documented. As part of this effort, agency staff should seek an active partnership with interested Native American Tribes to ensure the accuracy of pre-European history and determine which stories are suitable for interpretation to the public.

<b>Recreational Resources</b>	
<b>Issue</b>	<b>Preliminary Management Approach</b>
Trails	<p>DMR/HTL has a system of existing trails and potential for development of multiple use trails to link visitors to different resources and exceptional views throughout the park. As part of capital park development work, funding should be sought for development of a comprehensive trail plan and construction of a trail system. Development of such a plan should seek public input to ensure the trail system is developed and managed in a manner that is responsive to user needs and resource protection. Agency staff should seek out active partnerships with trail user groups and other interested parties to plan, develop, and maintain the park's trail system.</p> <p>Until a comprehensive trail plan is developed for the area, an interim trail plan should be prepared to address issues for existing trails such as allowed conveyances, maintenance needs, and signing.</p>
Interpretation of natural and cultural resources	<p>As part of capital development of interpretive facilities at the Dalles Mountain Ranch property, a park-wide interpretive master plan that builds on the interpretive master plan developed for the Horsethief Lake Area should be prepared. This plan should seek the involvement of regional natural and cultural resource organizations and experts and at minimum include:</p> <ul style="list-style-type: none"> <li>• Identification of park management goals related to interpretation</li> <li>• Identification of target audience</li> <li>• Identification of parameters/limiting factors under which the interpretive program must operate</li> <li>• Inventory and identification of natural/cultural resources appropriate for interpretation</li> <li>• Development of interpretive themes and sub-themes</li> <li>• Development of a network of interpretive opportunities, i.e., enticement, orientation, interpretive hubs, and location/design of specific opportunities</li> </ul>
Interpretation of historic ranching equipment	<p>As part of the park-wide interpretive planning effort, agency staff should continue working with the Friends of Dalles Mountain Ranch to restore historic ranch machinery. The location, extent, and facilities allocated for this purpose should be determined through more detailed site/facility planning for development of the Dalles Mountain Ranch area. If possible, the process of restoration should be shared with park visitors and be a part of the park's interpretive master plan.</p>
Paragliding	<p>Paragliding at Dalles Mountain Ranch will be managed as outlined in the Interim Paragliding Management Plan previously established for the park. Following master planning for the Horsethief Lake – Dalles Mt Ranch area, a finalized paragliding management plan will be prepared in cooperation with the Cascade Paragliding Club and other interested individuals and organizations that reflects any changed circumstances.</p>
Rock climbing	<p>Due to the popularity of Horsethief Butte for rock climbing, a management plan for this activity has already been prepared. Rock climbing activities will continue to be managed through this plan.</p>
Coordination with Columbia River Gorge Commission and the USFS National Scenic Area	<p>Following State Parks and Recreation Commission action on the facilities concept plan, land classifications, and long-term park boundary for Horsethief Lake State Park and the Dalles Mt Ranch Property, agency staff will seek zoning changes (if necessary) as part of the Columbia River Gorge Commission's National Scenic Area Management Plan review process. Agency staff will also continue to advocate public park use of the Dalles Mt Ranch area during review processes for designation of the Dalles Mt Road as a "key viewing area" by the Columbia River Gorge Commission.</p>

<p>Coordination with Klickitat County</p>	<p>State Park staff recognizes that conversion of the 3,200-acre Dalles Mt. Ranch property to a state park represents a significant change in land use for this area. Staff intends to work closely with Klickitat County to address issues of mutual concern (e.g, park-related use of Dalles Mountain Road) and seek practical solutions. Agency staff will continue to solicit input and cooperation from County Commissioners and staff during each phase of the master planning process currently underway.</p>
<p>Partnerships</p>	<p>The diversity of natural and cultural resources, as well as the potential for recreational resources at Dalles Mt.. Ranch and Horsethief Lake, and the associated groups that take interest in theses resources, have great potential for the forming of partnerships between State Parks and private groups. As such, park staff should seek to develop relationships with interested groups to work on programs in the park. Organizations that could potentially serve as partners include:</p> <ul style="list-style-type: none"> <li>• SECRETS program - environmental education programming and volunteer/fund raising cooperation for facilities development.</li> <li>• WSU Cooperative Extension- research effects of grazing on natural resources of the gorge area.</li> <li>• Friends of the Gorge - environmental ed programming.</li> <li>• Oregon Native Plant Society - agriculture-related technical assistance and cooperation.</li> <li>• Backcountry Horsemen - trails-related planning/design, construction, maintenance, and on-going management.</li> <li>• Columbia Area Mountain Biking Association - trails-related planning/design, construction, maintenance, and on-going management.</li> <li>• International Mountain Biking Association, Eastern Washington - trails-related planning/design, construction, maintenance, and on-going management.</li> <li>• Mazamas - Rock climbing management and trailhead sanitation development.</li> <li>• WSU - Grazing/Haying and other technical agricultural management support and public interpretation.</li> <li>• Livestock Growers Association - agricultural management cooperation and technical assistance.</li> <li>• Klickitat County Noxious Weed Board - agricultural management cooperation and technical assistance.</li> <li>• Columbia River Gorge Visitors Association - interpretive/visitor center development, regional tourism marketing, and lodging/camping-related technical assistance.</li> <li>• Klickitat County Tourism Advisory Committee - Recreational services-related technical assistance.</li> <li>• Gorge Trust/Friends of Dalles Mt Ranch - general support, volunteer coordination, fund raising support.</li> <li>• Cascade Paragliding Club - paragliding trailhead development, on-going paragliding management.</li> </ul>

## Let us know what you think

There are several ways for you to give us your thoughts or to get more information. You may direct written correspondence to Peter Herzog, the project's principal planner, c/o Washington State Parks and Recreation Commission P.O. Box 42668 Olympia, WA 98504-2668; e-mail [Peter.Herzog@Parks.Wa.Gov](mailto:Peter.Herzog@Parks.Wa.Gov) ; or call him at (360) 902-8652. You may also contact the Eastern Region's Stewardship Program at (509) 665-3329 or drop by the park office. The Horsethief Lake – Dalles Mountain Ranch Master Planning Project web site [www.parks.wa.gov/hldmrplan.asp](http://www.parks.wa.gov/hldmrplan.asp) also provides an e-mail link for comments.

## Next steps and final decision making

Staff intends to present recommendations included in this document for final consideration and action by the Washington State Parks and Recreation Commission at its scheduled June 19, 2003 meeting in Wenatchee, WA. State Environmental Policy Act (SEPA) environmental review forms an integral part of the planning process and is also available for public comment upon request.

We hope you find this process interesting and that you choose to remain actively involved in planning for the park. With your help, we will hand this park down to our grandchildren as a lasting legacy and a treasure of which we can all be proud.

## Attachment B

[Example letter of notification to owners of public/private properties under consideration for inclusion in a long-term park boundary]

**TO:** Selected Owners of Properties Adjacent to \_\_\_\_\_ State Park

**FROM:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**SUBJECT: Park Land Classification and Delineation of Long-Term Boundaries for \_\_\_\_\_ State Park – Potential Inclusion of Adjacent Properties**

The Washington State Parks and Recreation Commission is conducting a public planning process to help plan for facilities development and on-going protection and management of \_\_\_\_\_ State Park. As part of this process, the agency is classifying park lands and identifying adjacent properties for possible inclusion in what is referred to as a “long-term park boundary.”

Land classifications (park use and development intensity zoning) are planning tools the agency uses to set appropriate types of recreational uses and facility developments for areas within a given park. A long-term boundary is the Commission’s vision of which lands, from a holistic perspective, would ideally be managed in a way that complements the park’s conservation and recreation mission. Sometimes this may mean State Parks has a long-term interest in purchasing your property, while in other cases the agency might simply like to enter into a dialogue about how we could better help each other meet common property management goals.

State Parks staff is currently formulating preliminary recommendations regarding a long-term boundary for \_\_\_\_\_ State Park. Over the next several weeks, staff intends to solicit public input and finalize its recommendations to the Washington State Parks and Recreation Commission. Your property (or parts of your property) has been identified as a *candidate* for inclusion in the park’s long-term boundary. The attached map shows what portions of your property are under consideration.

So, what does this mean? If the Commission, in a final decision on land classifications and long-term boundary for \_\_\_\_\_ State Park, determines that your property might advantageously be included in the park’s long-term boundary, any of the below might apply:

- If ever you find yourself in a position where you would like to give your property away, the Washington State Parks and Recreation Commission would gratefully accept your tax deductible donation.

- If ever you decide you would like to sell your property the agency may be interested in purchasing it<sup>1</sup>.
- If ever you would like to explore the potential tax benefits of placing a “conservation easement” on portions of your property, the agency may be able to assist you in this process.
- If you feel you would like to support the conservation mission of the park but don’t quite know how, the agency may be able to provide you with technical resource management assistance.
- If you decide you would rather not become involved in park planning and would not like further contact with the agency, your decision will be respected<sup>2</sup>.

This letter is merely an expression of the agency’s interest in beginning a dialogue with you and carries absolutely no threat of forcible action. Specific scenarios the agency wishes to pursue depend primarily on you and the relationship your property has to the park.

If you would like more information or would like to become involved in park planning, please contact our office soon. Staff intends to bring its recommendations to the Washington State Parks and Recreation Commission at its scheduled \_\_\_\_\_ meeting in \_\_\_\_\_, Washington. You will automatically receive a copy of staff’s report and Commission Requested Action for review and comment prior to the \_\_\_\_\_ Commission Meeting. You may also attend the Commission meeting in person and provide comment directly to the Commission.

Thank you for your consideration. If you have any questions, please feel free to give me a call at (360) 902-8652 or email [peter.herzog@parks.wa.gov](mailto:peter.herzog@parks.wa.gov).

Attachment [preliminary land classification and long-term boundary map]

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<sup>1</sup> Purchase of private property by the Washington State Parks and Recreation Commission is dependent on securing Legislative appropriation or property acquisition funding from grants or other sources. Consequently, any purchases carry a level of uncertainty and may take several years to complete.

<sup>2</sup> Your property may be shown within the park’s long-term boundary for Commission policy direction only and is not intended to affect private property values, be used as an indication of a property owner’s willingness to sell, or be used as a basis for making state or local government regulatory, permitting, or zoning decisions on private land holdings.



**C**

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**C**

Example of Washington State Department of Natural Resources  
Designation and Land Acquisition for a Natural Area  
June 7, 2005

This summary of a recent land acquisition at a new natural area is produced to assist the study being conducted by the Interagency Committee for Outdoor Recreation under SSB 6242. The purchase of an initial parcel of land at the Washougal Oaks Natural Area will highlight the process utilized by the Department of Natural Resources (DNR) for natural area preserves, and increasingly for natural resources conservation areas.

Introduction to DNR Land Conservation Programs

Recognizing the need to protect Washington's natural heritage, the Washington State Legislature passed the Natural Area Preserves Act in 1972 (RCW 79.70) and amended it in 1981 to establish the Washington Natural Heritage Program within DNR. Natural area preserves may be designated on any lands, whether public or private. In 1987, the Legislature enacted the Natural Resources Conservation Areas Act (RCW 79.71), creating an additional conservation land designation utilized solely by DNR. Through the combined resources and efforts of the DNR Natural Heritage Program, the Natural Heritage Advisory Council (a citizen's advisory body created in RCW 79.70.070), the DNR Special Lands Acquisition Program, and the DNR Natural Areas Program, the department identifies, designates, acquires, and manages these two classifications of conservation lands.

The land designation for "natural area preserve," or NAP, is an internationally recognized conservation classification for lands that may be either in private or public ownership. Preserves provide the highest level of protection for the highest quality native ecosystems and rare plant and animal species. State-owned NAPs in Washington may provide opportunities to the public for research and environmental education. Natural resources conservation areas (NRCAs) are other DNR-owned conservation lands that protect special areas of statewide significance that possess outstanding ecological, scenic, geological, or archaeological values and also provide opportunities for education and low-impact public use.

Currently, DNR is steward and manager for 50 natural areas preserves and 28 natural resources conservation areas on more than 117,000 acres statewide.

By far the major sources of funding for acquisition of DNR's NAP and NRCA lands are two programs backed by the state's general fund budget, the Trust Land Transfer (TLT) Program and the Washington Wildlife and Recreation Program (WWRP). TLT funds the transfer of selected state granted trust lands (Common School Trust lands) out of trust status and into NAP or NRCA status where the properties have conservation values of statewide significance. WWRP grant funds, administered through the state Interagency Committee for Outdoor Recreation, are used to acquire privately owned lands that are eligible for inclusion into NAPs and NRCAs.

Federal land acquisition grants, other miscellaneous grants, and donations have also enabled DNR to acquire NAP and NRCA lands. The main federal programs DNR has used are National Coastal Wetlands Conservation grants and North American Wetlands Conservation Act grants, both administered through the U.S. Fish and Wildlife Service. Property donations and cash donations for land acquisitions have come from private landowners and non-profit conservation organizations such as The Nature Conservancy, the Cascade Land Conservancy, and the Northwest Ecosystem Alliance.

#### Process for Creating NAPs and NRCAs

DNR follows a standardized process for identification, review, and approval of “proposed” NAPs and, following a statutory change in 2002, has increasingly incorporated NRCA review into this same process. For NAPs, the department is directed to cooperate with federal, state and local agencies, private organizations, and individuals to ensure the creation of a truly statewide system of NAPs protecting representative examples of Washington’s natural landscape. Potential NRCAs are reviewed for their statewide significance in terms of the criteria listed in RCW 79.71.

*State of Washington Natural Heritage Plan* — DNR’s Natural Heritage Program is required by statute to prepare a *State of Washington Natural Heritage Plan* and update it biennially. This plan provides the framework for a statewide system of natural area preserves by identifying the criteria and process by which natural areas are selected, identifying priority ecosystems and species for protection, outlining methods of protection, and identifying the roles of agencies/organizations in natural area protection. The conservation work of many public agencies and private organizations is guided by the systematic inventory and framework from the *Natural Heritage Plan*.

Natural Heritage Advisory Council — When a site emerges from analyses as a prospective natural area, generally upon recommendation of staff from DNR’s Natural Heritage Program, a proposal is presented to the Natural Heritage Advisory Council. As implied by its name, the council advises DNR regarding implementation of the Natural Area Preserves Act and the creation of new sites, whether they be NAPs, NRCAs or a combination of the two. Based on the council’s evaluation, it approves or rejects recommended sites, and so advises DNR. The council, through its reviews and recommendations, ensures that high quality sites are preserved and that sound management practices are implemented to maintain them. According to statute, the council may be advisory to other landowning state agencies, and the council includes ex officio membership from the Washington Department of Fish and Wildlife, State Parks and Recreation Commission, Department of Ecology, and the Interagency Committee for Outdoor Recreation in addition to DNR.

Public Hearing/Commissioner of Public Lands — For those sites that are intended to be acquired and designated as natural areas by DNR, a public hearing must be held in the county where a majority of the land in a proposed natural area is located. The information gained from the public hearing, along with the site recommendation, is forwarded to the Commissioner of Public Lands for review and potential approval.

Land Acquisition — For those sites that are approved by the Council and the Commissioner of Public Lands, and where DNR is the intended managing agency, DNR staff begin the process of attempting to acquire the lands involved. DNR's Special Lands Acquisition Program is responsible for purchasing land that has been approved for preserve or conservation area status. The program evaluates, prioritizes, negotiates, and completes the purchase of special lands properties. Special Lands Acquisition also coordinates the department's applications for state and federal lands acquisition grants and administers the grant contracts. Purchases are made only from willing sellers and are based on market value land appraisals. DNR does not have the power of eminent domain for acquisition of natural areas; it cannot obtain lands for natural areas through condemnation.

DNR Management — Upon successful completion of an acquisition by DNR, the lands involved are considered part of the natural areas system and become the management responsibility of the DNR Natural Areas Program. Routine management for NAPs and NRCAs includes site maintenance and restoration, management planning, oversight of research and monitoring, and, where appropriate, creation of environmental educational access or other low-impact public uses.

#### Washougal Oaks NAP/NRCA Case Study

The Washougal Oaks Natural Area, established in 2005, lies on the Columbia River in eastern Clark County, beginning just east of the City of Washougal and continuing to the boarder of Skamania County. It is the largest remaining high-quality Oregon white oak woodland in western Washington. The ecological features of the white oak woodland help define the site boundary, which includes and combines natural area preserve and natural resources conservation area designations. This site represents the first time the Natural Heritage Advisory Council recommended this combined designation, a result of legislative changes to the Natural Area Preserves Act in 2002 that broadened the scope of the council to include recommendations, as warranted, for conservation area lands in addition to lands of natural area preserve quality. The first acquisition of 20 acres was made in 2005 from a willing seller of privately owned land. Several other negotiations are ongoing.

Washougal Oaks Natural Area can serve as an example of how a natural area preserve, and in this case a combined NAP/NRCA, becomes a reality, beginning with an ecologist's vision, through the site review and approval process, and finally to land acquisition and the site's designation on a map.

In spring of 2002, the Natural Heritage Program's westside ecologist made a formal recommendation (see attachment) to the Natural Heritage Advisory Council for approval of a proposed combined Washougal Oaks Natural Area Preserve and Natural Resources Conservation Area. Upon approval of the proposal by the council, the department proceeded to prepare an outreach plan to involve interested parties, including neighboring landowners, local, state and federal agencies, tribes, and private conservation organizations and land trusts, to seek their assistance in finalizing a boundary for the site.

The department, in accordance with RCW 79.70, held a workshop and a public hearing during the spring of 2003 to receive public comment on designation of the proposed site. In addition, staff from DNR's Pacific Cascade Region, Natural Heritage Program, and Natural Areas Program hosted site visits for the Natural Heritage Advisory Council and local government officials. As a result of the public outreach process, the original proposed boundary was modified in accord with comments received from the Skamania County Board of Commissioners and the public, with one large area deleted from the proposal and a smaller area added.

In March 2004, the Commissioner of Public Lands, after reviewing the final boundary recommendation and the record of the public process, signed a Commissioner's Order establishing the Washougal Oaks Natural Area Preserve/Natural Resources Conservation Area. Less than a year later, in February of 2005, the department was able to make its first purchase of 20 acres from a private property owner utilizing funding made available through a competitive grant process managed by the Washington Wildlife and Recreation Program.

As land acquisitions continue at Washougal Oaks Natural Area, DNR's Natural Areas Program staff will monitor acquired parcels for management needs, such as weed control, restoration, and public use issues. Modest investments of staff time will be directed to the site until such time that a sufficient amount of acreage within the proposed boundary is acquired and a higher level of research, environmental education, and potential low-impact public uses can be provided. Prior to any developed public use at the site, management planning that will be undertaken in a process that includes the local community and interested governmental agencies.

#### Summary

Washougal Oaks Natural Area represents the typical process that DNR utilizes for NAPs and, with statutory changes that included NRCAs within the purview of the Natural Heritage Advisory Council, that DNR will increasingly utilize for establishment of NRCAs. Final process details for solely NRCA-designated sites are still under development between DNR and the council.

DNR only purchases land eligible for inclusion in sites that have gone through a scientific, public, and administrative process to designate a proposed natural area boundary. In addition, nearly all of the funding used for land acquisitions at these approved natural areas goes through public and legislative processes where the areas proposed for purchase are specifically identified.

/CWP

Attachment: Washougal Oaks NAP/NRCA Recommendation, May 30, 2002

**WASHINGTON NATURAL HERITAGE PROGRAM  
NATURAL AREA RECOMMENDATION**

**Washougal Oaks Natural Area Preserve  
and Natural Resources Conservation Area**

Presented to the Natural Heritage Advisory Council  
May 30, 2002

**SIZE:**

1656 acres

**LOCATION:**

The western end of the site is located approximately 3 miles east of Washougal, Clark County, and extends from that point east approximately 4 ½ miles to Cape Horn, Skamania County. The site occupies portions of Sections 13, 14, 15, 23 and 24 in Township 1 North, Range 4 East, and portions of Sections 16, 17, 19 and 20 in Township 1 North, Range 5 East.

**OWNERSHIP:**

U.S.D.A. Forest Service, U.S. Fish and Wildlife Service, Columbia Land Trust, and private individuals (Figure 1).

**JUSTIFICATION:**

Washougal Oaks contains one of the two best remaining occurrences of the Oregon white oak/oval-leaf viburnum-poison-oak (*Quercus garryana/Viburnum ellipticum-Toxicodendron diversiloba*) forest association, a Priority 1 element in the 2001 *State of Washington Natural Heritage Plan* (Figure 2). This plant association is considered globally critically imperiled because of the small number of occurrences, small global range, and high degree of threats. The Washougal Oaks occurrence is part of the largest relatively contiguous area of oak woodland remaining in western Washington, almost all of which is included within the proposed natural area. The proposed combination of Natural Area Preserve and Natural Resources Conservation Area would provide protection for this ecosystem, portions of which are already owned by federal agencies.

The site also supports three animal and four plant species listed as priorities in the Natural Heritage Plan. Animals include the slender-billed nuthatch (*Sitta carolinensis aculeata*), a subspecies (Priority 1 in the Natural Heritage Plan) that has declined significantly and is now regularly present in the state only at Washougal Oaks and at one other site. Plant species occurrences include two of the thirteen total statewide known occurrences of bolandra (*Bolandra oregana*), and one of only seven statewide occurrences numbering more than 50 individuals of tall bugbane (*Cimicifuga elata*).



Figure 2. Oregon white oak/oval-leaf viburnum-poison-oak forest at Washougal Oaks site.

PRIMARY ELEMENTS:

- Oregon white oak/oval-leaf viburnum-poison-oak forest (*Quercus garryana/Viburnum ellipticum-Toxicodendron diversiloba*) – Priority 1, G1S1
- Douglas fir-Oregon white oak/snowberry forest (*Pseudotsuga menziesii-Quercus garryana/Symphoricarpos albus*) – Priority 3, G4S3
- Tall bugbane (*Cimicifuga elata*) – Priority 2, G2S2
- Gorge daisy (*Erigeron oreganus*) – Priority 2, G3S1
- Bolandra (*Bolandra oregana*) – Priority 3, G3S2
- Small-flowered trillium (*Trillium parviflorum*) – Priority 3, G3S2S3
- Slender-billed Nuthatch (*Sitta carolinensis aculeata*) – Priority 1, G5TUS1
- Peregrine Falcon (*Falco peregrinus*) – Priority 1, G4S1BS3N

## Washougal Oaks Proposed NAP/NRCA

- Larch Mountain salamander (*Plethodon larselli*) – Priority 3, G3S3

### OTHER FEATURES:

- Steelhead (*Oncorhynchus mykiss*) – Federal threatened, G4T2Q
- Coastal cutthroat trout (*Oncorhynchus clarki clarki*) – Federal proposed threatened, G4T4
- Coho salmon (*Oncorhynchus kisutch*) - Federal candidate, G4T2Q
- Low elevation stream and riparian system
- Bigleaf maple-red alder/swordfern-fringecup forest (*Acer macrophyllum-Alnus rubra/Polystichum munitum-Tellima grandiflora*)

### SITE FEATURES:

#### Physiography:

The site is located at the western terminus of the Columbia River Gorge, just after the river exits the Cascade Range. The site consists primarily of a long, more-or-less south-facing slope above the Columbia River and its associated bottomlands. Elevation ranges from about 20 feet along the Columbia River to a maximum of about 500-600 feet near the western end of the site and about 800-1000 feet at the eastern end of the site.

At the western end of the site, the main slope is generally moderate in steepness with a southwest aspect. Further east, the slope becomes very steep and aspect tends to the south or southeast. At the far eastern end of the site in the vicinity of Cape Horn, the slope becomes exposed cliffs facing east and east-southeast, with associated talus. Above this major slope to the north, a gently rolling terrace landform predominates. Above Cape Horn, this terrace landform gives way to moderate south aspect slopes extending off the southeastern side of Mt. Zion, a cinder cone, located about ¼ mile from the proposed site boundary. The slope dominating the site is dissected by a very steep-sided, north-south oriented ravine (Lawton Creek) with two branches that join within the site. Five much smaller north-south ravines are also present between Lawton Creek and Cape Horn.

#### Freshwater Features:

Freshwater on the site consists of the lower one-third of Lawton Creek and its perennial tributary located to the west of the main fork. The tributary runs mainly north-south through the site and then enters the main fork about 1/3 mile upstream from the site boundary. Lawton Creek enters the Columbia River about 1/2 mile south of the site boundary. Lawton Creek flows mostly northeast to southwest within the site until it joins with the tributary, below which it is oriented more north-south. Both forks have smaller, possibly intermittent, tributaries. At least eight other seasonal or small streams flow through the site from north to south or originate on the site and flow south into the Columbia River. Seeps appear to be relatively frequent features on some of the steep slopes. The shores of the Columbia River abut the southern edge of the central and eastern portions of the site.

## Washougal Oaks Proposed NAP/NRCA

### Geology:

The majority of the slopes within the site, the Lawton Creek ravines, and the upper terrace to the west of Lawton Creek are underlain by the Troutdale Formation (Beeson and Tolan 1987). The Troutdale Formation consists of fluvial conglomerates, sandstones, and siltstones deposited by the ancestral Columbia River during the Miocene, after the deposition of the Columbia River basalts, which flowed into the area from the east. Bedrock near the eastern end of the site consists of Columbia River basalt, with the earlier Grand Ronde member composing the cliffs at Cape Horn and a small area of the later Pomona member located about ½ mile further west (Beeson and Tolan 1987). A landslide deposit is mapped on the steep slope between the two basalt exposures. The upland terrace and slopes located east of Lawton Creek and on the southeastern side of Mt. Zion are underlain by Boring lava, a basalt deposited during the Pliocene from local cinder cones and small volcanoes. Finally, during the Pleistocene, the Missoula/Bonneville floods deposited some fluvial material that is mapped on the lower 1/3 of the slope above the Columbia River east of Lawton Creek (Beeson and Tolan 1987). Field observations indicate that Pleistocene flood deposits also occur on the toe-slope west of Lawton Creek, where they contain an abundance of small boulders and large stones (pers. obs.).

### Soils:

Soils on site have been described differently in Skamania (Haagen 1990) and Clark counties (McGee 1972). In Clark County, Lauren gravelly loam, cemented substratum, 20-55 percent slopes, predominates as the mapped soil series on the slopes and in the ravines (McGee 1972). The Lauren series is described as being derived from Columbia River alluvium with some volcanic ash. Significant portions of the upper slopes in Clark County are mapped as Olympic stony clay loam, 30-60 percent slopes. This soil unit is described as being derived from weathered igneous lava flows or associated colluvium, and underlain by basalt bedrock at a depth of 40 inches or more. Small areas of the slopes and most of the terraces above in Clark County are mapped as Hesson series clay loams, deeply weathered old alluvium.

In Skamania County, the soils on slopes fronting the river are mapped as Xerorthents-Rock Outcrop complex, 50-90 percent slopes, to the west, and Rock Outcrop-Xerorthents complex, 50-90 percent slopes, to the east, the only apparent difference between the two being the relative abundance of outcrops (Haagen 1990). Xerorthents are described as being derived from basalt and volcanic ash colluvium. Cape Horn and adjacent very steep slopes are mapped as Rock Outcrop-Rubble Land complex. Rubble land is a mixture of cobbles, boulders, and stones. The terraces and moderate slopes above the steep slopes and cliffs in Skamania County, are mapped as Skelida silt loam (loess and alluvium of basaltic origin) and Skoly stony loam (colluvium of basaltic origin).

### Climate:

The climate is characterized by mild, rainy winters and dry, warm summers. The nearby town of Battleground serves as the nearest comparable climate station: according to precipitation modeling the western edge of the site would have equivalent precipitation. Battleground has a

## Washougal Oaks Proposed NAP/NRCA

mean annual precipitation of 53.4 inches for the period 1971-2000 (Western Regional Climate Center 2002). Annual precipitation increases within the site while moving east and should average about 70 inches at Cape Horn. Mean July maximum is 77.7 degrees F and mean January minimum is 31.8 degrees F at Battleground. Air moving west through the Columbia River Gorge (cold in winter, hot in summer) has a notable influence on the climate (McGee 1972).

### Vegetation:

The majority of the site is forested. Two major forest types are present. The primary ecological feature of interest is the extensive stands dominated or co-dominated by Oregon white oak (*Quercus garryana*), which total 318 acres in area. The second major forest type is primarily co-dominated by Douglas-fir (*Pseudotsuga menziesii*) and bigleaf maple (*Acer macrophyllum*), or solely by Douglas-fir. Smaller areas of forest are dominated by red alder (*Alnus rubra*), bigleaf maple, or a mixture of the two. Other ecosystems present on site include sparsely vegetated cliffs and talus, herbaceous-dominated seeps, streams and associated riparian vegetation, small grassy balds, and agricultural lands.

The Oregon white oak/oval-leaf viburnum-poison-oak forest is dominated in the canopy by oak, generally with few to no other tree species except an occasional Douglas-fir or bigleaf maple. The tree layer typically displays 70-90 percent crown cover. The oaks are often relatively small, though individual trees are present up to about 18 inches in diameter. The well-developed shrub layer is dominated by oval-leaf viburnum (*Viburnum ellipticum*), poison-oak (*Toxicodendron diversiloba*), common snowberry (*Symphoricarpos albus*), and, more sporadically, oceanspray (*Holodiscus discolor*). Several other shrub species are frequent. The herbaceous layer is more variable in composition and not so prominent as the shrub layer. Species include licorice fern (*Polypodium glycyrrhiza*), great camas (*Camassia leichtlinii*), small-flowered nemophila (*Nemophila parviflora*), enchanter's nightshade (*Circea alpina*), woods strawberry (*Fragaria vesca*), fringe cup (*Tellima grandiflora*), bigleaf sandwort (*Moeringia macrophylla*), western Solomon's seal (*Maiathemum racemosum*), oval-leaf penstemon (*Penstemon ovatus*), Columbian larkspur (*Delphinium trollifolium*), cleavers (*Galium aparine*) and Nuttall's peavine (*Lathyrus nevadensis*). The sites occupied by this association appear to have relatively shallow soil or very stony soil, are typically south-east to south-west aspects and occur on gentle to very steep slopes.

The Douglas-fir-Oregon white oak/snowberry forest (Figure 3) is mostly dominated by a mixture of oak and Douglas-fir, sometimes with a prominent component of bigleaf maple and sometimes with little Douglas-fir (in which case it is distinguished from the previous association by its understory). The canopy is usually closed, with over 80 percent crown cover. Trees are usually larger here than in the previous association; many individual oaks are over two feet in diameter, and some Douglas-fir are even larger. Douglas-fir saplings or small trees are locally numerous. A well-developed shrub layer is somewhat variable in composition and almost always has a prominent to dominant component of common snowberry. Other shrubs that sometimes co-dominate include beaked hazel (*Corylus cornuta*), oceanspray, serviceberry (*Amelanchier alnifolia*), dwarf Oregon grape (*Mahonia nervosa*), trailing blackberry (*Rubus ursinus*), and vine maple (*Acer circinatum*). The herbaceous layer is not as prominent as the shrub layer and usually has a major component of swordfern (*Polystichum munitum*). Other common herbs include snow queen (*Syntherisma reniformis*), woods strawberry, bigleaf sandwort, fringe cup, inside-

## Washougal Oaks Proposed NAP/NRCA

out flower (*Vancouveria hexandra*), pioneer violet (*Viola glabella*), Oregon fawn-lily (*Erythronium oregonum*), parsley-leaf lovage (*Ligusticum apiifolium*), Columbian larkspur and Alaska oniongrass (*Melica subulata*). This association typically occurs on somewhat deeper or less stony soils than the other oak association and a somewhat broader range of aspects.



Figure 3. Douglas-fir-Oregon white oak/snowberry forest at Washougal Oaks site.

Douglas-fir-bigleaf maple forest typically has Douglas-fir as the tallest canopy component and a somewhat lower layer of bigleaf maple, though variations from the typical structure are not uncommon. Oak or red alder are sometimes present in this forest type. Grand fir (*Abies grandis*) is present as saplings or scattered trees in some areas. The understory usually has a prominent layer of swordfern that may dominate the herbaceous strata. Several other forbs may be abundant including vanillaleaf (*Achlys californica*), starry Solomon's seal (*Maianthemum stellatum*), and inside-out flower. Co-dominant or dominant shrub species include dwarf Oregongrape, vine maple, beaked hazel, common snowberry, trailing blackberry, or, where disturbed, Himalayan blackberry. This vegetation type is common on the more mesic sites throughout the area.

The bigleaf maple-red alder/swordfern-fringe cup forest is associated with unstable slopes and landslide deposits. The one known location is about 1/3 mile southwest of Cape Horn. The canopy is dominated by bigleaf maple. The understory is co-dominated by swordfern and a variety of shrubs including thimbleberry (*Rubus parviflorus*), beaked hazel, and common

## Washougal Oaks Proposed NAP/NRCA

snowberry. Siberian springbeauty (*Claytonia siberica*) and western Solomon's seal are abundant as well and fringecup is present.

Red alder, or a mixture of red alder and bigleaf maple, dominates some stands, especially on steep moist slopes or on toe-slopes, terraces, or floodplains of the ravines. Conifers are sometimes present in low abundance, including western redcedar (*Thuja plicata*) and western hemlock (*Tsuga heterophylla*). The understory is often characterized by abundant swordfern or salmonberry (*Rubus spectabilis*). Several other shrubs or herbs may be locally dominant, including vine maple, common snowberry, red elderberry (*Sambucus racemosa*), Himalayan blackberry, slender-stem waterleaf (*Hydrophyllum tenuipes*), Columbian larkspur, youth-on-age (*Tolmiea menziesii*), cow-parsnip (*Heracleum maximum*), Oregon oxalis (*Oxalis oregana*) and Pacific bleedingheart (*Dicentra formosa*).

The riverine floodplain of Lawton Creek and its tributaries has not been examined closely. Himalayan blackberry is abundant in at least two areas along the creek.

Seeps on steep, rocky surfaces, and the rocky surfaces around waterfalls are small-patch ecosystems with herbaceous vegetation. Some of the common species include western maidenhair fern (*Adiantum aleuticum*), fringecup, youth-on-age, and yellow monkey-flower (*Mimulus guttatus*).

Several small herbaceous dry balds occur on the site where sunny aspects and extremely shallow soils coincide. Species that occur in these communities include common camas (*Camassia quamash*), nineleaf lomatium (*Lomatium triternatum*), woolly sunflower (*Eriophyllum lanatum*), Geyer's sedge (*Carex cf. geyeri*), early blue violet (*Viola adunca*), cutleaf microseris (*Microseris laciniata*), and harsh paintbrush (*Castilleja hispida*). These areas are often ringed by, or intermixed with, Oregon white oak dwarfed by the very dry and/or windy conditions.

Most of the relatively level terraces above the main slope are dominated by agricultural habitats. The predominant cover appears to be improved pasture. There are small stands of native trees (Douglas-fir, bigleaf maple, oak) and scattered trees in some of these agricultural lands, as well as some human residences. In addition, there are several human residences on smaller lots, mainly near the perimeter of the site. Himalayan blackberry is a dominant vegetation, sometimes with an open oak, maple, or alder canopy, on less-used portions of some of these agricultural lands.

### Rare and Vulnerable Plant Species:

A population of gorge daisy (*Erigeron oregonus*) occurs on a sparsely vegetated south-facing cliff face just above the Columbia River at Cape Horn. The population appears to occupy a fairly small area, but has not been well documented.

The tall bugbane (*Cimicifuga elata*) population consists of at least 50-75 individuals. The largest portion of the population occurs on a gently sloping bench above Cape Horn; smaller subpopulations occur further upslope to the north and about 1/3 mile to the southwest on a

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moderate south-facing slope. The habitat is understory of moist to semi-dry forest dominated by red alder, bigleaf maple, and in some areas, Douglas-fir.

Two populations of bolandra (*Bolandra oregana*) occur on the site. One population of at least 100 individuals occurs on a seepy steep conglomerate exposure above a stream in a small ravine at the Clark/Skamania county line. The second population occurs at Cape Horn and is visible both near the Columbia River at 60 feet elevation on a wet basalt cliff and also at a waterfall (perhaps the same stream as below) at the top of Cape Horn (elevation 800 feet). This population appears to consist of only a few individual plants in each location, but there may be portions of it that are not visible because of the tall cliffs.

A population of small-flowered trillium (*Trillium parviflorum*) (Figure 4) occurs near the western edge of the site on gentle south-facing forested slopes. The species was observed in three separate areas. The first is a small patch of about 30 individuals in the understory of oak woodland with abundant tall shrubs (oval-leaf viburnum, Pacific ninebark (*Physocarpus capitatus*), oceanspray). The other locations nearby had 1-3 plants each and were in mixed Douglas-fir-Oregon white oak-bigleaf maple forest.



Figure 4. Small-flowered trillium.

### Rare and Vulnerable Animal Species:

The slender-billed nuthatch (*Sitta carolinensis aculeata*), a subspecies of the White-breasted Nuthatch, is regularly, though not commonly, reported from mixed Douglas-fir-oak-maple forest at the western end of the site (R. Hamby pers. comm.). One to two individuals are regularly recorded year-round in cottonwood stands on the adjacent Steigerwald National Wildlife Refuge (W. Cady pers. comm.). In addition, there is one recent record for the species in June from oak forest at the county line within the site (B. Altman pers. comm.).

A Peregrine Falcon (*Falco peregrinus*) eyrie (nest site) has recently become established on the cliffs at Cape Horn.

Larch Mountain salamander (*Plethodon larselli*) has been recorded in forested talus in the vicinity of Cape Horn.

Three species of anadromous salmonids use the stretch of Lawton Creek and its main tributary within the site. Coho salmon and steelhead are documented as spawning; coastal cutthroat is documented as using the site.

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### CONDITION:

The core area of oak forest appears to be mostly in good condition. Portions of the area have been selectively logged in the past for Douglas-fir. Himalayan blackberry patches occur along some edges and infrequently in the interior of the forest also. Other than the blackberry, there are few non-native plants in most of the oak forest. Saplings and small poles of Douglas-fir are dense enough in the understory to be a long-term threat to the survival of the oak canopy in localized areas.

Forests on the site are mostly young (50-100 years) to mature (100-150 years) in age. Quantitative investigations of stand age have not been conducted. Bark and limb characteristics of Douglas-fir indicate that many are over 90 years old and few are over 200 years old. Past logging disturbance has occurred on many portions of the site, with varying levels of severity.

The dry herbaceous balds and associated oak fringe communities that have been examined have many non-native plant species and by mid-summer are mostly dominated by the non-native component. Many native species are common, though not dominant, in these communities.

Himalayan blackberry is present in significant portions of the site and dominates locally along edges and in understories of open woodlands or deciduous-dominated forest. Roadsides, disturbed areas, areas adjacent to existing development, and little-used agricultural lands have the greatest concentrations of this invasive species. The Lawton Creek riparian corridor appears to have a major concentration also.

Gravel mining has occurred in the past along lower Lawton Creek, and judging from examination of aerial photos, has probably had a significant influence on the fluvial morphology of the area.

The populations of gorge daisy and bolandra appear to be in habitats little impacted by non-native species or human disturbance. The small-flowered trillium population is very close to roadsides and a patch of Himalayan blackberry, though the exact location of the plants themselves is dominated by native species. The tall bugbane population is located in young to mature native-dominated forests that have experienced varying degrees of past logging disturbance.

### LANDSCAPE CONTEXT:

The surrounding landscape of Washougal Oaks is a mixture of agricultural lands, low-density residential, forests and forest patches, the Columbia River, and Columbia River wetlands and riparian forests. Overall, landscape context is fair. The Columbia River borders about 2/3 of the site on its south side. State Highway 14 runs east-west through much of the site, and borders the site in other areas.

The area to the north of the site is mostly agricultural land with some low-density residential development and scattered patches of forest. One exception to this is the ravines of Lawton

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Creek, which extend north from the site for about two miles and are totally forested. The northern ends of these drainages merge into semi-continuous forested areas with less agriculture than to the south.

To the west of the site and north of Highway 14, agriculture and low-density residential development give way in about two miles to the town of Washougal. A narrow band of forest with some oak extends west of the recommended site on the same south-facing slope as within the site for approximately one mile. South of Highway 14 to the west of the site is a wildlife refuge with a mosaic of herbaceous and open-water wetlands, former agricultural lands, and cottonwood forest patches.

To the east and northeast of the eastern end of the site, forests predominate in the landscape. Agricultural lands and low-density residential are present in small areas to the east of the site. Landscape context to the east of the site is good.

### CURRENT USE:

The core area of oak forest receives little use currently. Portions of it are zoned for forestry operations. There are no human trails known within the core area, though deer trails are common. There is one old, narrow, partially overgrown dirt road running through a portion of the core area of oak forest.

State Highway 14 runs through significant portions of the site. Several much smaller roads access home sites. A few houses are located within the site, but most are near the edges of the site. Some agricultural lands are located within the site, primarily improved pastures. There appears to be no active forestry operations on the site. An active railroad line runs along the southern edge of the site adjacent to the Columbia River.

Recreational use is primarily concentrated near the eastern end of the site in the vicinity of Cape Horn. A less than ¼ mile long dirt trail leads from Highway 14 across a forested bench to a precipice overlooking cliffs and a waterfall at Cape Horn. This trail appears to be well used, but is not signed. An old dirt road leads from the highway about ¼ mile west of Cape Horn steeply downslope and to the southwest all the way to the railroad tracks next to the river. The road is rutted and shows evidence of recent use by vehicles. However, there is no current use for the road other than recreation.

### OTHER KNOWN EXAMPLES:

The Washougal Oaks site contains one of only two high-quality examples of the Oregon white oak/oval-leaf viburnum-poison-oak forest association. A total of four other element occurrences that meet minimum viability criteria are known in Washington. The few other occurrences are too small or degraded to meet viability criteria. The only other high-quality occurrence (medium to large in size, good condition) is found on Ridgefield National Wildlife Refuge and adjacent private lands. A portion of that occurrence is protected in the Blackwater Islands Research Natural Area. One other good-sized occurrence on private land is only fair in condition and landscape context. Inventory for this element has been relatively thorough.

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The Douglas-fir-Oregon white oak/snowberry forest has not been a significant target for inventory at the association level. Therefore, data in the Washington Natural Heritage Information System (WNHIS) is very incomplete for it. There are only three other element occurrences in the WNHIS, though many more are known to occur and have not been tracked. One of those occurrences is on a Nature Conservancy preserve in San Juan County and is quite different in understory composition and environment from the Washougal Oaks occurrence. It has also been severely disturbed by past grazing. Another is on Oak Patch NAP in Mason County and is also different in composition and is much smaller. The third is at Weir Prairie on Fort Lewis, where it has some level of protection in a Research Natural Area. The Washougal Oaks occurrence is the only one of the documented occurrences representing the floristic and environmental variation associated with the Puget Trough-Willamette Valley ecoregion south of the Vashon glaciation. It is also likely to be one of the largest, if not the single largest, occurrence of this element in the state. Most occurrences are small and/or degraded and not in a protective land status.

There are approximately 44 extant populations of tall bugbane in Washington. Only six other occurrences number 50 or more individual plants. The Washougal Oaks occurrence is one of the seven relatively viable populations known in the state. Two other viable occurrences have some level of protection: one in Olympic National Park and the other in Lewis and Clark State Park and Natural Forest Area, Lewis County. There is one very small population in Columbia Falls NAP.

Gorge daisy is known in only five other occurrences in the state, representing 4-5 populations. Other populations appear to be larger than the one at Washougal Oaks. A population is present in Columbia Falls NAP.

There are a total of twelve other known, apparently extant, populations of bolandra. Most of these populations consist of fewer individuals than at Washougal Oaks. One population occurs in Columbia Falls NAP and five occur in the Wenaha-Tucannon Wilderness Area in Umatilla National Forest.

There are approximately 37 other extant populations of small-flowered trillium in Washington. Several other populations are much larger than that at Washougal Oaks. One population is present in Bald Hill NAP, Thurston County, and another is in a Nature Conservancy preserve along the Black River, Thurston County.

The one other site in the state where the slender-billed nuthatch now resides is at the Ridgefield National Wildlife Refuge. At that site, the subspecies is a documented breeder, whereas at Washougal Oaks there is less certainty about its status. In the recent past, the subspecies occurred at a site in Cowlitz County and at several sites in Pierce County from which it has become extirpated.

The Larch Mountain salamander is known to occur at approximately 60 other locations in the Columbia River Gorge and Cascade Range north to King County. It is found in Beacon Rock

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State Park and Table Mountain Natural Resources Conservation Area and perhaps in other protected areas as well.

Peregrine Falcon nests at approximately 100 other sites scattered across the state, a considerable number of which have protective status, including Lummi Island NAP.

### NATURAL AREA DESIGN:

The proposed design is a combination of Natural Area Preserve and Natural Resources Conservation Area. The objective of the design is to maximize viability of the elements on site with an appropriate level of conservation and to represent a rare ecosystem type in the natural areas system for research and education.

The ecological boundary (Figures 5 & 6) illustrates the area where the element occurrences are present and the area needed to conserve them. Within the ecological boundary, some lands will be appropriate for acquisition, others for conservation easements or other cooperative management agreements, and others for invasive species management. The project area boundary (Figures 1, 5 & 6) follows parcel lines on private land within Clark County, including those parcels with significant areas within the ecological boundary. In Skamania County and on public lands, the recommended boundary follows a variety of natural and man-made features.

A portion of the steep slopes with extensive oak woodlands located south of Highway 14 in Skamania County may be eligible for Research Natural Area status.

### Natural Resources Conservation Area:

The project area boundary, which incorporates both the proposed Natural Area Preserve and the larger surrounding conservation area, is designed to incorporate and protect from threats all the viable portions of the oak forest ecosystem and the vulnerable species occurrences.

The total area of the proposed NRCA (including federal ownership within the project area) is 1430 acres. The site is bounded on the southwest near the railway line; on the south and southeast by the Columbia River; on the east by the base of the slope below Cape Horn; on the north by a combination of parcel lines near the ecological boundary in Clark County and roads (Marble Road, Highway 14) and intact forest in Skamania County; and on the west by Gibson Road.

The boundary along the southwestern edge of the site parallels the railway line about 300 feet southwest it. In one area, the project area boundary deviates further south to include an entire privately-owned parcel. The oak forest associations are located directly adjacent to or nearby and upslope from the railway line. The opposite side (southern) of the railway line is primarily degraded wetlands and former pastures managed or targeted for acquisition by the U.S. Fish and Wildlife Service. The additional area on the southern side of the railway line is included to highlight the importance of managing invasive species in areas adjacent to the oak forest.

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Along much of the southern and southeastern edge of the site, the railway line is located at the bottom of a steep slope adjacent to the shores of the Columbia River. The oak forest is located on the steep slope above. Near Cape Horn, at least one of the rare plants is located on cliffs adjacent to a lengthy railroad tunnel. Using the river as the boundary highlights the potential presence of rare plants on the portion of the slope that crosses over the top of the tunnel, and the importance of managing invasive species along the railroad line.

At the far eastern end of the site, the entire known extent of the rare plants and animals is included. Because the Larch Mountain salamander is associated with steep forested talus, the bottom of the steep slope below Cape Horn was used as the boundary. On the uphill side of Highway 14 at the far eastern end of the site, the boundary includes contiguous unfragmented forest and rare plant populations and abuts a clearing that may be a mining operation.

Continuing west along the northern edge of the site, the boundary joins Highway 14, which it follows for approximately one mile. In this area, the highway abuts both small agricultural fields to the south as well as forest that is contiguous with the oak forest. All the oak forest in this stretch is located away from the highway edge, so a substantial management buffer between the element occurrence and the boundary is included in the design.

At the point where Marble Road goes due west off Highway 14, the oak forest begins to extend upslope above the highway as the highway descends the slope. Marble Road is a convenient boundary that allows about a 0.1 mile buffer of agricultural lands between the boundary and the forested slope and element occurrences. The boundary follows the road for approximately 1.3 miles, before turning north along a parcel line.

Along the east side of Lawton Creek, the boundary follows parcel lines north from Marble Road. These lines come close to approximating the ecological boundary which follows the upper end of the forested slopes above the creek. Going up Lawton Creek, the boundary includes all those parcels that have some portion of the oak forest occurrences, as well as an additional buffer of forest and agricultural land 0.1-0.25 mile wide.

Continuing west from Lawton Creek along the northern edge of the site, the boundary follows those parcel lines that include oak forest or forest contiguous with the oaks important for management or agricultural or residential land directly adjacent to the oak forest element occurrences.

At the far western edge of the site, the boundary abuts Gibson Road for a very short distance, then extends slightly further west on the south side of Highway 14 to include all the forest in that area and an additional small buffer on the national wildlife refuge. Forests to the west of Gibson Road are too degraded by invasion of Himalayan blackberry to be manageable and are marginally connected to the forest east of that road, so they are not included within the boundary.

### Natural Area Preserve:

The preserve design includes the largest contiguous, unfragmented stand of oak forest, a portion of the adjoining ravines, and some smaller stands of oak forest located in and adjacent to the

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ravines. The oak forest in this area appears to be mostly in good condition; there are no houses, roads, or agriculture within the area.

The proposed NAP would encompass a total of 226 acres. It is bounded on the southwest by Highway 14, on the southeast by Lawton Creek, and on the north primarily by agricultural and residential land.

Highway 14 is a break in the oak stand and a manageable boundary for the preserve. The boundary is designed to completely surround the large oak stand and two smaller nearby stands. The boundary in many areas along the north follows the edge of the oak stands where they border agricultural lands. Within the ravines, the boundary occurs a short ways upstream from where the oak stands end.

On the southeastern side, the boundary follows the edge of Lawton Creek as a convenient marker of the bottom of the slope upon which oak stands occur upslope.

The oak woodlands to the east of Lawton Creek were not included in the preserve design for the following reasons. The forests immediately east of the creek are somewhat more fragmented by agriculture. The oak forest to the east of the creek is bisected by the highway.

The oak woodlands to the west of the proposed boundary of the preserve are not in as good condition as those further east due to narrow areas of intact forest, more fragmentation, and greater abundance of non-native plant species. Therefore, they are not included in the proposed preserve boundary.

### MANAGEMENT CONSIDERATIONS:

Management efforts will focus on threats to the site's primary elements. These include invasion of non-native plant species and encroachment and growth of Douglas-fir in oak communities. Other management issues include those associated with a highway that passes through the site and a few houses within the site, as well as existing and proposed trails.

The project area includes private and federal land ownerships. In addition, there are a number of government and non-governmental groups interested in conservation planning for the area (e.g., Columbia Land Trust and Friends of the Columbia River Gorge). Consequently, management of the site will likely involve input from multiple groups and individuals. Such an approach is not new to the Natural Heritage and Natural Areas Programs. Planning and management at a number of existing natural areas across the state has incorporated a number of government and non-government organizations and concerned citizens through a series of public meetings and draft documents. Planning and management for Washougal Oaks is envisioned using such an inclusive approach. Managing species like the slender-billed nuthatch and the oak communities will involve cooperation with U.S. Forest Service, U.S. Fish and Wildlife Service and Washington Department of Fish and Wildlife. Controlling non-native and invasive weeds will involve working with these same agencies, local weed boards, and private landowners. Management of this site will need to be a cooperative effort.

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The primary threat to the oak communities is the presence and potential additional invasion of the site by Himalayan blackberry (*Rubus discolor*). This species dominates the understory of oak stands just west of the project area and in some peripheral areas within the project area. It has the potential to displace the native understory in most, if not all, of the oak stands. This weed can best be controlled through multiple management strategies after DNR assumes ownership and by working cooperatively with adjacent landowners. The management goal would be to remove infestations from areas with less blackberry cover and from good condition oak communities (communities with little disturbance and few non-native species) first and then work on more severe infestations and infestations in poorer condition oak communities (more disturbed and with a higher percent cover of non-native species). Fortunately, most of the site is in fairly good condition.

Multiple techniques will likely be used to control blackberry depending on the condition of the native community, extent and severity of the infestation, and proximity of the infestation to high quality elements. Techniques that have been successful include mowing, hand pulling/cutting/hoeing of canes and roots, and the selective use of herbicides (broadcast and cut stump application). The Nature Conservancy has been successful in reducing the biomass and the extent of infestations in oak communities in Oregon through repeated mowing (Ed Alverson pers. comm.). The Natural Areas program has been successful in controlling blackberry in the Puget Prairies using a combination of digging roots and canes, mowing and herbicide application.

Other non-native weeds of concern include English Ivy (*Hedera helix*) and periwinkle (*Vinca major*). Both of these weeds are currently present on lands within the project area. English ivy is an evergreen climbing vine and an aggressive invader that threatens native vegetation in forest and open conditions. When growing along the ground, ivy forms a dense canopy that prevents sunlight from reaching other plants. Similarly, climbing ivy vines prevent most of the sunlight from reaching the leaves of the host tree, resulting in reduced vigor and death of the host tree. Periwinkle, a member of the Dogbane Family (Apocynaceae), is a perennial, evergreen herb with erect flowering stems and trailing non-flowering stems. Periwinkle grows most vigorously in moist soil with only partial sun, but will grow in deep shade and poor soil conditions (Bailey 1914). Once established, it forms a dense carpet and excludes other herbs (Bailey 1914). Both periwinkle and English ivy can be controlled through a combination of mechanical and chemical approaches.

Douglas-fir encroachment also threatens at least portions of the oak community in the long-term. In the absence of fire, Douglas-fir moves into oak communities as a seed source is available, and eventually grows to overtop and shade out oaks and understory species associated with the oak community. It would be very difficult to use fire as a management tool within the project area because of its proximity to houses and private property and the lack of fire breaks between the houses and the oak community. Consequently, it may be necessary to mechanically remove some Douglas-fir in portions of the area. Removal efforts will likely focus initially on saplings and small trees since it is their growth that most threatens the future viability of the oak community and they are easiest to remove. Girdling of larger trees is a good option if there is a need to open the canopy around existing oaks. However, since Douglas-fir is a natural and historical (Government Land Office surveys) component of these communities, the goal will not

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be to entirely eradicate it from the oak stands, but to keep it at a level that does not threaten the viability of the oak communities.

The project area design includes several houses and agricultural fields. DNR does not need to own the houses and cleared land in order to manage the site. However, it will be necessary to monitor private lands adjacent to DNR lands to prevent weed invasion from these properties. Some of these properties may be appropriate for conservation easements or other cooperative agreements that allow DNR to manage weeds on the private properties.

State Highway 14 runs through the project area. Management concerns associated with the highway include fire and illegal dumping. Illegal dumping is a problem for many state natural areas. Although unsightly, dumping generally does not threaten the elements that the natural area was intended to protect. However, dumping of yard and chemical waste, in particular, are problematic. Yard waste can contain invasive weeds that can pose a threat to the site and chemicals can contaminate portions of the site. Consequently, it will be necessary to monitor all areas where people have access for these potential threats and to clean them up quickly. Fire caused by people traveling the highway does not necessarily threaten the natural area because oak woodlands are fire adapted. For example, oaks will readily sprout from stumps killed by the fire, which gives them an advantage over species that do not sprout (e.g., conifers). Because fire poses a threat to houses and private property adjacent to the natural area, it will be necessary to develop a fire management plan for the site.

A hiking trail between Washougal and Stevenson has been proposed. As proposed, the trail would run south of the western end of the project area along the Columbia River, then parallel and adjacent to the railroad tracks for about 1.5 miles along the southern side of the central portion of the site before following what is now a primitive trail and then a dirt road located west of Cape Horn that leads up to the highway. The proposed trail does not go through the proposed NAP and is not likely to threaten the site. Its overlap with the project area is almost entirely on U.S. Forest Service land. The Natural Areas and Natural Heritage Programs will work with the local trail associations and the U.S. Forest Service to protect the primary features of the site during any trail planning process.

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## **The Washington Department of Fish and Wildlife Lands Portfolio: Transparency, Communication, and Planning**

The following information regarding the Washington Department of Fish and Wildlife's (Department) lands portfolio is provided here to further the Interagency Committee for Outdoor Recreation's efforts to study the acquisition and management of state-owned lands. A brief review of the Department's background helps provide context for the lands portfolio, an overview of the recently-completed "Lands 20/20" publication establishes the lands portfolio principles, and a synopsis of several current communication and planning efforts demonstrates the application of these principles. Each of the efforts discussed below represents the Washington Department of Fish and Wildlife's significant commitment to maintaining a citizen-supported portfolio of lands through transparency, communication, and effective planning.

### **Background**

Voters and Legislatures throughout Washington's history have affirmed the contribution of Washington's diverse fish and wildlife to our unique quality of life by directing state agencies to protect and perpetuate our natural resources and the lands that sustain them. In our state's early history, the focus of the Department of Fisheries and the Department of Game (predecessors to the Washington Department of Fish and Wildlife) was the protection and perpetuation of consumptive uses. As early as 1939, for instance, the Department of Game purchased property for the management of game and recreational hunting opportunities.

By the early 1970s, the Department of Game had acquired approximately 340,000 acres of land, largely to support game species and provide access to recreational hunting. Around this time, however, the former emphasis on protecting consumptive uses grew to include all wildlife species. The landmark federal Endangered Species Act was passed in 1973, and represented the new outlook on wildlife, habitat, and nature. Between the years of 1971 and 1990, the Department's land acquisition was primarily the result of mitigation settlements with federal agencies and local entities.

In the year 1990, Washington's management of fish and wildlife and related opportunities shifted yet again. The Legislature recognized the value of our state's fish and wildlife and outdoor recreation heritage and the threat that poorly planned development poses to these values. At the urging of the Washington Wildlife and Recreation Coalition, the Legislature created the Washington Wildlife and Recreation Program (WWRP). This program distributes money to state agencies and local government entities to permanently protect habitat and recreational lands across the state. The WWRP has enabled the Washington Department of Fish and Wildlife (Department) to acquire more than 70,000 acres of critical habitat to support the persistence of species such as Sharp-tailed grouse, pygmy rabbits, and salmon. Protecting critical habitat assists species whose future is threatened by lost, converted, or fragmented habitat.

The Department of Wildlife (formerly, Game) and the Department of Fisheries merged in 1994, resulting in even more diverse land holdings. Fish hatcheries joined hundreds of fishing/boating access sites, game lands, mitigation settlement lands, and species protection lands under the umbrella of the newly formed agency. Additionally, the

Washington Department of Fish and Wildlife has forged numerous voluntary agreements with other government and private landowners to manage their lands for fish and wildlife conservation.

This acquisition history has left the Washington Department of Fish and Wildlife with a collection of more than 800,000 acres under its ownership and management, and these lands are as diverse as the species and opportunities they support. The Department currently owns more than 500,000 acres for the benefit of fish, wildlife, and access to hunting and fishing. The agency also provides benefits to fish, wildlife, and sportspeople by maintaining voluntary management agreements on more than 300,000 additional acres that are owned by other government and private landowners. The vast majority of Department lands are managed as part of individual wildlife areas. There are also more than 600 water access sites scattered throughout the state that are no more than a few acres in size. These lands reflect the Washington Department of Fish and Wildlife's ongoing efforts to respond to society's changing fish and wildlife values – concern for game and non-game populations and recreational opportunity, responsibility to mitigation settlements, and (more recently) protection of critical habitat for vulnerable populations.

### **Lands 20/20: A Clear Vision for the Future**

The Washington Department of Fish and Wildlife recently completed the document entitled, "Lands 20/20: A Clear Vision for the Future," which provides a vision and a framework for the management of the Department's lands portfolio. This framework document was developed with input from our Land management Advisory Council, as well as representatives from the Washington Association of Counties, Farm Bureau, Nature Conservancy, Conservation Commission, Washington Wildlife Federation, U.S. Fish and Wildlife Service, and others. The new framework document is intended to provide a blueprint to ensure the Department's future land acquisitions are both strategic and cost effective.

One of the primary purposes of this framework document is to improve the transparency with which decisions about the Department's lands portfolio are made. One way that "Lands 20/20" improves transparency is by articulating the two primary purposes for which lands are acquired or managed. All of the lands and activities included in the Washington Department of Fish and Wildlife's lands portfolio must contribute to one of two needs: the need for benefits to fish and wildlife and the need for benefits to the public. Benefits to fish and wildlife may include direct benefits to species, habitats, or the biodiversity of Washington State. Benefits to the public include the availability and accessibility of recreational opportunities, opportunities to increase knowledge, and direct and indirect economic benefits. All of the actions taken to support the Department's lands portfolio (including the acquisition and disposal of real property) must be completed with operational excellence, including meeting all standards for, and commitments to fiscal accountability, stewardship, and partnership with others.

The "Lands 20/20" framework also improves transparency by injecting a new evaluation and decision-making tool into the land transaction and management approval processes.

### **Land Transaction Evaluation Matrix**

This new evaluation tool, the land transaction evaluation matrix, was carefully designed to be used as an assessment of the degree to which a specific property contributes to the Department's vision, goals, and needs. The land transaction evaluation matrix is not used to the exclusion of more specific evaluation and scrutiny by Department staff and executive leadership. Rather, the evaluation matrix serves as an *initial screen* of the fish and wildlife related values that a property can provide. It is a high-level guide for Washington Department of Fish and Wildlife staff and decision-makers as they assess whether lands project proposals contribute to the fundamental tenets of the Department's lands vision and portfolio.

In addition to guiding decision-making, the evaluation matrix preserves an important record of the initial values and uses associated with a particular investment in the Department's lands portfolio. As such, completed evaluation matrices can be shared among regions, across programs, between regional and headquarter staff, and with other agencies and stakeholders. Additionally, this record allows the Department to evaluate whether particular properties continue to meet the needs for which they were originally purchased or managed. This allows for the disposal of lands that no longer meet the fish and wildlife related needs of the Washington Department of Fish and Wildlife.

In general, the land transaction evaluation matrix presents a practical way to improve internal and external communication regarding land management and ownership decisions.

### **Oversight of the Lands Portfolio**

The Washington Fish and Wildlife Commission provides the highest level of oversight of the Department's lands portfolio. The nine Commissioners, who are appointed by the governor and confirmed by the senate, must approve any acquisition before it is added to the lands portfolio. Washington Fish and Wildlife Commission meetings are open to the public, and public comment is solicited at each meeting.

Another approach that is being developed to improve transparency and communication of decisions regarding the Department's lands is the establishment of a Lands Oversight Committee. This committee will report to the Director, and will evaluate lands portfolio decisions (including acquisition) for consistency with the Department's mission, strategic plan, and the "Lands 20/20" framework. This committee's initial work may include evaluating existing program procedures for consistency with the "Lands 20/20" framework, the land transaction evaluation matrix, and other lands policies and procedures.

The Department is considering transforming its current Land Management Advisory Committee into the desired Lands Oversight Committee. The Land Management Advisory Committee is comprised of representatives from a number of stakeholder groups, as well as citizens from across the state. The transformation of the existing committee into an oversight committee represents the Department's strong commitment to building a citizen-supported portfolio of lands. The specific procedures by which the new Lands Oversight Committee will operate are currently being drafted.

### **Wildlife Area Management Plans**

Nested below the overarching principles and framework provided by the "Lands 20/20" document are management plans regarding the specific properties within the Department's lands portfolio. Nearly 801,000 of the more than 830,000 acres that the Washington Department of Fish and Wildlife manages are contained within the boundaries of a wildlife area. A management plan for each of these wildlife areas guides all of the activities that occur on those lands.

A wildlife area management plan develops land operations that are consistent with the Department's mission, strategic plan, and the vision contained here, as well as the activities of the rest of the Department. Such a plan is the vehicle through which the Department works with local communities to ensure that each wildlife area provides benefits to fish and wildlife and the public and is seen by the community as an asset. It is the basis for funding and prioritizing our activities on each wildlife area, and allows us to operate these lands as efficiently and effectively as possible. It documents our intentions, provides justification for our actions, and is the record by which we communicate what can and cannot be carried out on each wildlife area. A wildlife area management plan requires broad internal and external review and input in order to be effective, credible, and supported.

Wildlife area management plans are currently being revised and updated, and all will be completed by January of 2006. Each wildlife area management plan is being developed with the input and review of local citizen advisory groups. Citizen advisory groups (CAGs) bring public input, ideas, and concerns to the land management table. CAGs represent stakeholders, neighbors, and community and regional perspectives and are an important and ongoing part of the wildlife area management planning process. The revised and updated wildlife area management plans are designed to guide all activities occurring on Department wildlife areas, and will be reviewed annually with internal, external, and CAG input. Wildlife area management plans are subject to the State Environmental Policy Act, and will be adopted through that process.



*Washington*  
*Department of*  
**FISH and**  
**WILDLIFE**

# **Lands 20/20:**

# **A Clear Vision**

# **For The Future**

**Washington Department of Fish and Wildlife**

March 2005

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# Foreword

## Lands For Fish And Wildlife And The Citizens Of Washington

I am pleased to present to you our Lands 20/20: A Clear Vision For The Future. It is an opportunity to share with you our values about fish and wildlife and how those are reflected in our unique portfolio of lands owned or managed by the Washington Department of Fish and Wildlife (Department).

Washington's diverse fish and wildlife and the lands that support them make a significant contribution to our quality of life through hunting, fishing, hiking, wildlife watching, other forms of recreation, as well as through the economic benefit derived from these activities.

Land acquisition is one of the tools used by the Department to conserve Washington's fish and wildlife and provide related recreational opportunities, but it is a powerful tool that carries with it responsibilities and costs, and can only occur successfully with the support of our citizens. Our understanding of the fish and wildlife values of Washington's citizens is dynamic, and is influenced by our patterns of land use, work, and travel. The Department's responsibility has grown beyond maintaining only hunting and fishing opportunities. Additionally, a multitude of federal, state, tribal, and local governments and non-profit organizations have entered the land management and acquisition arena in order to preserve all facets of ecological value and related opportunities. As society's expression of fish and wildlife values grows, and the number of entities who wish to preserve those values increases, it has become ever more important for the Department to clearly articulate its unique role through an overarching lands vision.

We owe much to early Washingtonians, whose foresight preserved valuable game lands and assured that the fish and wildlife related activities they knew then would be available to us today. Our land legacy began in 1939 when hunters, fishers, and my predecessors recognized that some places were special for fish and wildlife and wildlife recreation, and should be permanently protected in public ownership. That recognition led to our first acquisition, an 80-acre parcel for mule deer in Okanogan County. The specific goals for our lands have grown since the 1930s, but the general purpose of our lands has not. The Department owns and manages lands to provide sound stewardship of fish and wildlife and related opportunities.

Today, almost 70 years and hundreds of acquisitions later, it is clear that one of our most successful conservation accomplishments is our lands portfolio. This portfolio includes over 512,000 acres owned by the Department, which consist of unique habitats across the state that harbor many of the more than 1000 vertebrate species that occur in Washington. Hundreds of thousands of people visit these lands each year to recreate and enjoy the wildlife opportunities they provide.

Although my department's ownership of land represents only 1.3% of all the land in the state, we have set aside some incredibly unique places for fish and wildlife that surely would have been lost if not for our actions. This legacy also includes more than 600 water access sites that are public portals to our lakes, rivers and marine areas. All of these lands are vital to maintaining our rich and diverse wildlife heritage and to maintaining opportunities for the citizens of this state to hunt, fish, or just enjoy our abundant wildlife in its natural setting.

In Washington, we can take pride in being one of the leaders in recognizing these needs, and acting to permanently protect fish and wildlife lands. This conservation vision received a tremendous infusion of public support and funding when, through the actions of the Washington Wildlife and Recreation Coalition and our legislature, the Washington Wildlife and Recreation Program was established in 1990. Every biennium, this program provides funding to local governments, state agencies, and non-governmental entities for habitat conservation and recreation projects around the state.

Our fish and wildlife legacy is as important to our state as its rain forests, mountains, deserts, rivers, lakes, and marine areas. In order to maintain our rich and diverse wildlife species, these habitats and,

yes, entire ecosystems must be fully functioning and provide the full suite of ecological benefits. Clean water carries anadromous fish back to their birthplace; landscapes are shaped by natural disturbances; and a healthy food web supports plants and animals, from microscopic plankton to charismatic mammals like deer, elk, and cougar.

Washington's natural world is incredibly diverse, and that diversity supports thousands of plants and animals. While most of us can identify with a majestic bull elk or a chinook salmon, it is more difficult to see and appreciate the biological processes that work to support the web of life. This web of life is complex, and understanding it in the face of a rapidly growing human population is becoming increasingly difficult. It is of paramount importance that we make every effort to protect what we can, lest we inadvertently eliminate a part that may hold the key to our own long-term survival or the natural legacy we steward.

Of equal importance for my department is sustaining fish and wildlife related opportunities for hunting, fishing, wildlife viewing, and other recreational activities. Each of these pursuits depends on *healthy* fish and wildlife populations. Wildlife related recreation is a \$2 billion industry in Washington, and these economic benefits to Washington's citizens need to continue.

In the next 25 years, the number of people that call Washington their home is projected to increase by 2.7 million, requiring five additional cities the size of Seattle, or 14 the size of Spokane, to accommodate that growth. By 2045, Washington's population is expected to double. Although it is the smallest continental western state, Washington is now the second most populated, which generates unprecedented pressure on our natural resources.

As habitat loss occurred in Washington, my department took the necessary steps to protect imperiled species and habitats, which included land acquisitions. When doing so, we are often asked, "How much is enough?" Unfortunately, with a few exceptions, we do not have a direct answer to that question. The habitats across which we attempt to protect and manage fish and wildlife and biodiversity are constantly changing and, in many cases, declining. Though the scientific community is getting smarter about understanding the habitat needs of fish and wildlife, we cannot say with exact certainty how much land must be conserved to ensure the future of the state's full range of fish and wildlife biodiversity.

It is perhaps more appropriate to ask how many fish and wildlife and related opportunities we want to preserve for our children. This public policy question will be in front of us whenever we are asked to make decisions about future acquisitions. My department will bring the best available science to the decision-making process and offer alternatives when we can, but the public will make the ultimate decisions about future fish and wildlife conservation or recreation acquisitions. These decisions will be based on what we willing to risk, and what we all want to pass on to our children. Where we go from here will be up to all of us.

Sincerely,

Jeff Koenings, Ph.D.  
Director

## Overview

In response to questions and concerns about the Department's land acquisition program from the general public, counties, the legislature, and even from Washington Department of Fish and Wildlife staff themselves, Director Jeff Koenings, PhD., initiated an effort to convey an overarching vision for Department lands. This initiative began with an interdisciplinary team of Washington Department of Fish and Wildlife staff, who created a comprehensive list of policy and practice issues that needed resolution or clarification. The effort was then taken up by a smaller policy group that worked together and with external stakeholder input to craft a vision for agency lands.

Dr. Koenings and his staff sought a vision that would communicate to the public the variety of land management strategies that the Department uses to achieve its goals for fish and wildlife conservation and sustainable recreational opportunities. Land acquisition, where the Washington Department of Fish and Wildlife pays for and owns the property, is one strategy among a host of other approaches. The Department's foremost expertise is in providing scientific information and analysis so that other entities can make informed land management choices to benefit fish and wildlife. In addition, many programs exist to provide incentives to private landowners to pursue conservation strategies on their land. The Department's Landowner Incentive Program, for example, passes federal funding to private landowners to protect species at risk on their land. Cooperative agreements (which may include renting or leasing land) are also important tools for protecting fish and wildlife values. The Department enters into agreements with other governments, entities, or private landowners to carry out management activities on their lands that provide benefits to fish and wildlife. Often, local, state, or federal regulations provide sideboards to land use activities that confer important protections to fish and wildlife habitat. Finally, the Department may enter into land preservation agreements with other landowners. Here, the Department buys protection of fish and wildlife or habitats from the owner, who may continue to live on, and farm or ranch, the property. Describing the various land management strategies, articulating the Department's goals, and weaving the connections among goals, tools, and the future of Department lands are all part of the lands vision Dr. Koenings was looking for.

### Lands Vision Initiative

This report communicates that lands vision, as well as the attendant policy and decision-making framework. The vision statement connects the Washington Department of Fish and Wildlife's land management and ownership to its legislative mandates and its strategic plan. Further, the report conveys the particular ways in which maintaining public land helps the Department to meet those mandates. Explicit connections are made among the vision and policy goals, the tools the Department uses to identify land that supports fish and wildlife values and related opportunities, and the attributes the Department looks for in particular properties. Finally, this report presents a filter by which the Department can evaluate the degree to which both new and old properties contribute to the Department's vision and goals.

This report represents one prong in a "two-pronged" approach to managing the Department's lands. This report should be thought of as a framework for guiding and evaluating the relationship between lands and the Department's overall vision and goals. The Department also engages in many inter- and intra-agency planning processes, which provide a more detailed and specific framework, consistent with the lands vision and Department goals. In fact, lands that the Department owns and manages should be linked to the Department's strategic plan or to one of the plans or mitigation settlements that is consistent with Department goals and objectives.

These issue-specific plans (e.g. the Comprehensive Wildlife Conservation Strategy, salmon recovery plans, the Watchable Wildlife Strategy, a statewide game management plan, a species recovery plan, or

a particular Wildlife Area Plan) are the second prong, and will continue to provide the detailed strategy and priorities for a specific property, issue, or species. The Department's dual mandate (to protect fish and wildlife and related recreational opportunities) implies the use of multiple, sometimes conflicting, management strategies. It is in the development of these issue-specific plans that Washington Department of Fish and Wildlife staff can work together to reconcile management goals and land management approaches to best achieve the objectives for particular properties or wildlife areas.

Finally, the changeable nature of society's values necessitates the periodic review of the vision described in this document. The Washington Department of Fish and Wildlife may need to revise the vision and goals for its lands to reflect changing activities, land use, or fish and wildlife values. In this way, the lands vision report is truly a living document, growing and changing to reflect the values and attitudes of the public the Department serves. Future review of this document is discussed in the Implementation chapter.

# The Lands Vision

The Washington Department of Fish and Wildlife is governed by a dual mandate, and these twin goals work hand in hand to ensure sustainable fish and wildlife populations and wildlife-related opportunities. The Legislature clearly directs the Department to “preserve, protect, perpetuate, and manage” the fish and wildlife species of the state as its paramount responsibility (RCW 77.04.012). At the same time, the Department must continue to maximize opportunities to hunt, fish, and appreciate fish and wildlife, consistent with that paramount responsibility (RCWs 77.04.012 and 77.04.020). The Department’s lands vision embraces the Legislature’s direction, and affirms the contribution Department-owned lands can make toward sustaining this direction into the future.

## Vision Statement

*Lands 20/20: A Clear Vision For The Future. Protecting our unique quality of life by maintaining a citizen-supported portfolio of lands to sustain Washington’s diverse fish and wildlife and their habitats into the next century.*

### *The Future*

The Washington Department of Fish and Wildlife’s constituents include current and future generations, and the vision statement acknowledges the Department’s long-term planning horizon. Just as the Department of Game acted early in the twentieth century to preserve hunting opportunities for today’s public, so too does the Washington Department of Fish and Wildlife act to preserve *today’s* fish, wildlife, and related opportunities into the next century.

### *Our Unique Quality of Life*

The lifestyle that Washingtonians enjoy is unique and irreplaceable. The diversity of fish and wildlife related activities that are available to us are unprecedented, and attracts businesses and workers from around the country. The Washington Department of Fish and Wildlife’s stewardship responsibility reflects Washington’s heritage, and includes maintaining sustainable hunting, fishing, wildlife viewing, and other wildlife-compatible opportunities. For some, simply knowing that healthy fish and wildlife populations exist contributes to their quality of life, and the Department’s work supports this value as well. Protected lands also contribute to our quality of life indirectly, by protecting and enhancing ground water supplies and air quality.

### *A Citizen-Supported Portfolio of Lands*

The Washington Department of Fish and Wildlife’s citizen-supported portfolio of lands is an *investment* in the future of these values in Washington State. The Department seeks to garner the support of Washington citizens by maintaining lands that reflect current fish and wildlife values and provide opportunities consistent with those values. The Department diversifies its lands portfolio by making use of many of the numerous land management strategies discussed above. The Department’s most important land management approach is to provide the science-based tools and assessments that help other agencies and organizations designate land management and acquisition priorities. Another strategy the Department uses is to guide the management of lands owned by other state, federal, and local governments in order to maximize the fish and wildlife values or recreational opportunities. The Washington Department of Fish and Wildlife also enters into voluntary agreements with other landowners to actively manage their lands for fish and wildlife related values. Additionally, the Department establishes leases, easements, or other cooperative agreements with private landowners for public hunting and fishing access and/or habitat restoration or conservation. Finally, the Washington

Department of Fish and Wildlife acquires land to secure fishing and hunting access sites and to protect land for the conservation of fish and wildlife species and biodiversity<sup>1</sup>.

### ***Washington's Diverse Fish and Wildlife and Their Habitats***

The Washington Department of Fish and Wildlife is a steward for the persistence of Washington's diverse fish and wildlife that are, in turn, an integral part of the overall biodiversity of our state. The Washington Department of Fish and Wildlife adopts a species-scale approach to biodiversity by managing and protecting land for the continued persistence of threatened and endangered fish and wildlife species. The Department also takes a proactive, landscape-scale approach to biodiversity by managing and protecting many habitat types to the benefit of rare, common, threatened, and abundant species alike. By considering biodiversity on these two scales, the Washington Department of Fish and Wildlife can contribute to the recovery of fish and wildlife species that are already declining and to the prevention of future declines of species.

### **Department Goals**

The aspirations articulated in the vision statement can be recast as simple goals: benefits to fish and wildlife, benefits to the public, and operational excellence. The goals are easy to understand, originate from the Department's Strategic Plan, and encompass the responsibilities implicit in the vision statement. These goals, discussed in subsequent sections, are the first step toward relating the broad vision for the lands portfolio to the day-to-day business of the Washington Department of Fish and Wildlife.

### **Department Needs**

In order to achieve the Department's goals, properties within the lands portfolio must contribute to a particular set of needs. To achieve the goal of benefiting fish and wildlife, the Department needs lands that contribute value to species, habitats, and biodiversity. Lands assist the Washington Department of Fish and Wildlife in providing benefits to the public by offering available and accessible opportunities to enjoy fish and wildlife related activities, by contributing to scientific knowledge, and by benefiting economies. In order to deliver all of its services with operational excellence, the Department needs to manage its lands portfolio by maintaining fiscal accountability, a strong stewardship ethic, and viable partnerships. These needs will be discussed in more details in subsequent sections of this report.

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<sup>1</sup> "Biodiversity is defined by the Washington Biodiversity Conservation Committee as 'the full range of life in all its forms.'" Excerpted from: Washington Biodiversity Conservation Committee. *Washington Biodiversity Conservation Strategy Report: Making the Connections. Report to the Washington State Legislature, October 2003.*

## Benefits to Fish and Wildlife

***Our Vision for the Future: Basic needs, including key habitats, will be understood for species at risk; Wildlife-accessible habitats will exist that are sufficient to sustain species at risk, keep common species common, and assure adequate game populations; Each of the habitat types in Washington State<sup>2</sup> will have sufficient acreage under some form of protection to assure properly functioning habitat.***

The Washington Department of Fish and Wildlife's mission is to preserve, protect, perpetuate, and manage Washington's fish and wildlife species and the biodiversity they represent. The land itself is a key to achieving this mission: it benefits fish and wildlife directly by providing habitat that supports species biodiversity, and indirectly by providing a stage for ecological processes and functions to operate. The Department seeks lands with intrinsic value to all of Washington's fish and wildlife species. For some species, the Department seeks habitat functions provided by natural landscapes (those with native plant communities and intact ecological processes), while other species need lands that are actively managed for a particular habitat function. A combination of these two approaches is the best avenue by which to bolster declining populations, maintain game populations, and protect existing biodiversity.

But the Department pursues this land management strategy in a changing landscape. Our patterns of land use, work, and travel continue to alter the land, causing a lands portfolio that sustains fish and wildlife to be a moving target. How can we keep this moving target within our sight?

One common method of creating an effective lands portfolio is to use modeling and analysis to identify an ideal collection of properties to be conserved for ecosystem benefit (particularly biodiversity). While such modeling is useful, the "optimal" properties must be purchased over time. Rarely do these properties continue to be the best choices in the face of changing real estate values, patterns of growth, and distributions of fish and wildlife. The Department's long history of conservation efforts has revealed that simple rules (such as choosing lands with the highest species richness or the most irreplaceable biological value) can be used with research studies and analytical models to more effectively conserve fish and wildlife and their habitats.

The notion that simple decision-making rules can be used alongside information from models or analyses supports the approach the Washington Department of Fish and Wildlife takes to provide benefits to fish and wildlife. The specific contributions of our lands portfolio toward fish, wildlife, and biodiversity are the result of management and acquisition choices that adhere to some general principles, as well as to some of the specific priorities and recommendations established in more detailed planning processes. This section discusses some of the general principles that guide additions to the lands portfolio, the major plans that provide important detail and, finally, some steps the Department wishes to take in the future to assure further benefit to fish and wildlife.

### Species

The most straightforward way to assure that the lands portfolio provides benefits to fish and wildlife is to focus on the fish and wildlife themselves. The Washington Department of Fish and Wildlife uses the presence of key habitat for focal species as one indication of the land's value. Key habitat is habitat that is critical for one or more of a species' life stages. This may include breeding grounds, rearing habitat, or over-wintering lands. A focus on declining species and populations, as well as animals that are of

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<sup>2</sup> Johnson, David H. and Thomas A. O'Neil, Managing Directors. *Wildlife-Habitat Relationships in Oregon and Washington*. Oregon State University Press, Corvallis: 2001.

local concern, acts as a species-scale filter for Washington's biodiversity. It is in this way that the Department works to assure that no species is eliminated from the state.

In identifying lands that will best benefit focal fish and wildlife species, the Department considers several factors. Foremost, the Department seeks to protect key habitats that are "irreplaceable". These are habitats that provide benefits to the species that cannot be provided anywhere else in the state. These areas are often "lasts": the last mating grounds in the state, the last nesting grounds in the state, or the last lake that harbors any population at all. Animals that are present on the federal list of threatened and endangered species are also a high priority, followed closely by the Washington Department of Fish and Wildlife's list of threatened and endangered species. The Department also looks to the federal and state lists of candidate species, or species of concern, which indicate fish and wildlife populations that are likely to become threatened in the future. Finally, populations that are locally important, or are identified as "target species" in an ecoregional assessment, are considered. Keystone species also deserve special consideration, because they serve as a critical link in the nutrient cycle of an ecosystem. Certain fish and wildlife have a special significance for communities and regions across the state, independent of their status on a federal or state list, and the Washington Department of Fish and Wildlife recognizes the value of this significance.

### Tools<sup>3</sup>

Current tools to aid in identifying key habitats for species include single- and multiple-species recovery plans, the Department's Priority Habitats and Species database, the Department's SalmonScape on-line mapping database, Columbia River Basin subbasin plans, and analytical tools such as Ecosystem Diagnostics and Treatment, ecoregional assessments, and local habitat assessments. Management plans for individual Wildlife Areas may also identify adjacent or nearby key habitats for important species. Other plans, such as Shorebird Conservation Plans, Neotropical Bird Conservation Plans, and game management plans direct actions to conserve or manage groups of animals or particular populations. A future tool for assisting the Department in its species-scale endeavors is the State Comprehensive Wildlife Conservation Strategy. This plan is being produced in order to maintain eligibility for federal Wildlife Conservation and Restoration Program funds, and integrates existing inventory and planning efforts. It will help to shape the lands portfolio by identifying species and habitats that are most in need of conservation. This strategy will be completed in October of 2005.

### **Habitats**

In addition to managing lands for focal species, the Washington Department of Fish and Wildlife's lands portfolio provides substantial benefits to multiple fish and wildlife species by including lands that provide a variety of ecological functions. Some lands harbor the ecosystem processes that help adjacent lands to remain healthy and functional. Often, the Department conducts restoration on its lands to repair the processes and structures that historically existed on the landscape. Other lands are actively managed to provide particular, valuable functions, such as habitat for an endangered species or winter forage for valuable game populations. Whether the lands have been unaffected by development or need some restoration or management, habitat functions are the backbone of the lands portfolio, benefiting robust and declining populations alike.

Lands in the lands portfolio exhibit a number of ecological functions. Ecological connectivity is important, and assures that water, nutrients, and the fish and wildlife themselves can be distributed across the landscape. They include ecosystem processes, like delivery of water and sediments, and

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<sup>3</sup> The "Tools" sections included throughout this document are not intended to be comprehensive lists of all the relevant tools and plans that the Department of Fish and Wildlife invests or engages in. Rather, the "Tools" sections capture some of the key tools and plans that guide the Department's efforts.

exhibit healthy function, such as providing groundwater recharge. These lands contribute to the integrity of the landscape around them, supporting existing protected lands or adding a core of high value habitat to surrounding land of moderate value. Such healthy lands protect a migratory route, or offer a corridor that connects two larger habitat areas, preventing lands from become isolated and less functional.

Another aspect of the Department's lands portfolio is managing habitat to perpetuate game species for the maintenance of hunting, fishing, and other harvesting opportunities. These species may not be threatened or endangered, but the maintenance of healthy populations of harvestable species – from mule deer to shellfish – underpins all opportunities to hunt, fish, and harvest. Consequently, the Department includes within its portfolio lands that function to support key habitat for those harvestable species.

The Washington Department of Fish and Wildlife does not seek to own all the lands in the state that provide benefits to fish and wildlife. There are many such lands that are protected by local land regulations, by other conservation agencies or entities, and by conscientious landowners. Therefore, the Department protects lands that would otherwise face some sort of risk (like changing regulations or changing ownership) that would eliminate the land's fish and wildlife values. It is the role of the Washington Department of Fish and Wildlife to provide a last line of defense against the loss of critical habitat, or an individual species.

### Tools

Many tools exist to assist the Department in identifying habitats that meet the criteria discussed above. As mentioned, the State Comprehensive Wildlife Conservation Strategy, to be completed in October of 2005, will identify species and habitats of the highest conservation need. Individual species recovery plans may make recommendations regarding the ecosystem functions of lands, as may particular mitigation settlements. Subbasin plans and ecoregional assessments also provide direction regarding lands that help support healthy populations, ecosystem processes, and functions. For lands within the Washington Department of Fish and Wildlife lands portfolio, individual Wildlife Area Management Plans describe the actions that must be taken to achieve and maintain particular functions on lands that are managed to benefit fish and wildlife. Some statutes provide guidance regarding the management of public lands. RCW 79.13.620, for example, directs the Washington Department of Fish and Wildlife to achieve certain ecosystem standards on those of its lands that are managed for agricultural or grazing objectives.

### **Biodiversity**

While the Washington Department of Fish and Wildlife's responsibility for responding to the decline of specific species and populations will remain for the foreseeable future, the Department is increasingly taking *proactive* measures to protect and preserve fish and wildlife by focusing on Washington's biodiversity. The Department participated in the production of the 2003 *Washington Biodiversity Conservation Strategy Report*, and is working to integrate the strategy recommendations into its business wherever possible. The Strategy's recommendation number five is of particular importance to the Department's lands portfolio: *Improve efforts to conserve biodiversity on public lands*. The focus on biodiversity in the lands portfolio is carried out at a landscape scale – the protection of many habitat types benefits rare, common, threatened, and abundant species alike.

The biodiversity component of the lands portfolio will be effective because it will include lands that have high conservation value (as indicated by biological measures) and are vulnerable (face some risk to their current biodiversity value). Prioritizing places according to the combination of biodiversity conservation value and vulnerability is one of the more useful results that Washington's ecoregional assessments have produced. These assessments, produced through collaboration of the Washington Department of Fish and Wildlife, The Nature Conservancy, and the Washington Department of Natural Resources, assess the biodiversity and conservation potential of lands across the nine ecoregions of Washington State. Each of the eight ecoregional assessments that cover the nine ecoregions of the state will be completed by the year 2006. The ecoregional assessments provide a land evaluation that presents the relative conservation value and vulnerability of lands across each ecoregion. The lands of highest priority to the Department are those that exhibit the highest conservation value and highest vulnerability. Succeeding combinations of conservation value and vulnerability can be prioritized according to Figure 1.

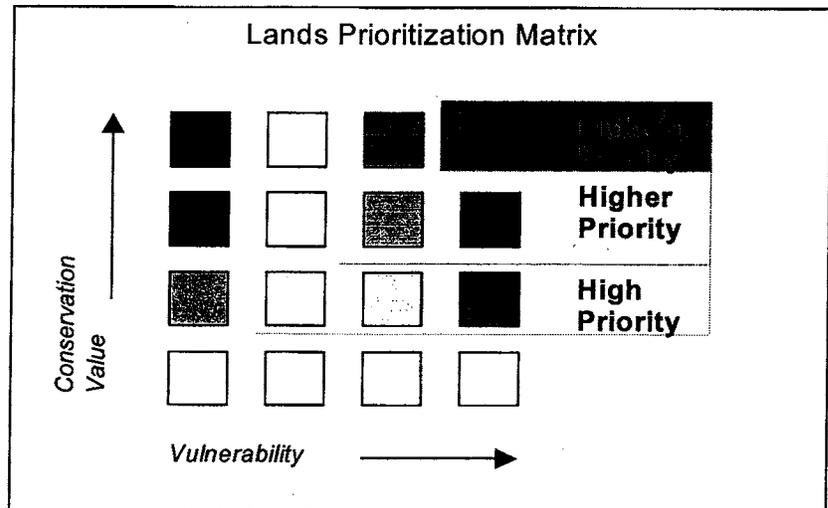


Figure 1.

Where ecoregional assessments have yet to be finished, or for assessing freshwater and nearshore

marine systems, other variables can be used as surrogates for the conservation value/vulnerability comparison discussed above. Biological measures such as species richness and habitat richness can be used as a surrogate to evaluate the biodiversity conservation value of land. Species richness measures the number of different fish and wildlife species types that inhabit the land. Habitat richness measures the number of habitat types encompassed within a given area. As discussed above, vulnerability factors are factors that endanger the current biodiversity value of the land. Risk may, for example, take the form of changing land use regulations, changing ownership, or the end of a short-term conservation easement.

### Tools

In addition to ecoregional assessments, the Department uses other tools and assessments to help identify biodiversity values of lands. The Washington Department of Fish and Wildlife's Priority Habitats and Species (PHS) provides information about habitat and species associations, and makes some land management recommendations. *Wildlife – Habitat Relationships in Oregon and Washington*<sup>4</sup>, by David H. Johnson and Thomas A. O'Neil provides invaluable information regarding the relationships between species and their habitats. The Washington Biodiversity Council began meeting in the fall of 2004, and is implementing the number one recommendation of the *Washington Biodiversity Conservation Strategy Report*<sup>5</sup>: developing a statewide biodiversity strategy. When completed, this strategy will guide the

<sup>4</sup> Johnson, David H. and Thomas A. O'Neil, Managing Directors. *Wildlife-Habitat Relationships in Oregon and Washington*. Oregon State University Press, Corvallis: 2001.

<sup>5</sup> Washington Biodiversity Conservation Committee. *Washington Biodiversity Conservation Strategy Report: Making the Connections*. Report to the Washington State Legislature, October 2003.

biodiversity conservation efforts of the Washington Department of Fish and Wildlife and other agencies. Other recommendations from the *Washington Biodiversity Conservation Strategy Report* that pertain, in particular, to ecoregional assessments, include using science-based ecoregional assessments to identify conservation priorities, completing ecoregional conservation assessments, and expanding the Washington ecoregional assessment partnership (recommendations 3, 20, and 21)<sup>6</sup>.

### **How Much Is Enough?**

The landscape across which we attempt to protect and manage fish and wildlife and biodiversity is, as mentioned, constantly changing. Though the science underpinning our understanding of species and habitat relationships is always progressing, leading to better and more effective protection and management decisions, we have not yet achieved a scientific understanding of how much land must be conserved to ensure the future persistence of the state's fish, wildlife, and biodiversity.

It is possible, however, to compare information about the habitat types that historically covered Washington's landscape with the habitat types that currently cover our landscape. From this comparison, we can see the percent of historic coverage that remains today, and we can determine what portion of today's coverage (as well as what percent of the historic coverage) is already conserved and protected. If we could determine the percent of the historic coverage we should "aim" to protect, we could compare this goal to the lands currently protected and see the "gap" in conservation.

Setting a numerical goal, however, of percent of historic habitat coverage, is not a scientific endeavor. While the Washington Department of Fish and Wildlife has taken the lead in furthering fish and wildlife science and producing fish and wildlife related tools and assessments, no one state agency can set such policy-dependent goals for species and habitat protection. Such goals represent socio-political and economic choices, and must be the result of collaborative discussions and decision-making.

The Legislature anticipated the need for such a collaborative process with the passage of Substitute Senate Bill 6242 (SSB 6242 or 6242). This bill directs the Interagency Committee to conduct an assessment of the current state of our public lands, and then lead a collaborative discussion among state agencies and other entities to produce a statewide land strategy. It is in this arena that the Washington Department of Fish and Wildlife can engage with other state agencies and entities to decide upon an appropriate quantitative goal, the distribution of roles and responsibilities with regard to those goals, as well as the process for revising the goals to reflect our ever-increasing understanding of species and the habitats they live in.

## Benefits to the Public

*Our Vision for the Future: All Washington citizens will have an opportunity to access and appreciate this state's fish and wildlife; Availability and access to fish and wildlife related opportunities will increase consistently with demand; All Washingtonians will have opportunity for a fish and wildlife educational experience; To the greatest extent practicable, Department lands will present a direct or indirect economic benefit to the local or state economy.*

The Washington Department of Fish and Wildlife is not only accountable for the protection of the fish, wildlife, and biodiversity of the state, but for the protection of citizens' ability to access and learn from these natural resources. It is the right of every citizen of the state to access and appreciate the fish, wildlife, and biodiversity that so uniquely contribute to our quality of life. The mission that the Department of Game initiated with the acquisition of mule deer habitat in 1939 is continued today – continued and expanded to encompass the breadth of fish and wildlife related activities that people now enjoy. These activities include hunting, fishing, and wildlife viewing opportunities such as bird watching, photography, and beach combing. The Department's management and protection of lands to benefit fish and wildlife presents other unique opportunities to the citizenry – opportunities for learning and discovery.

These natural landscapes offer other benefits to the public: the environmental benefits produced by healthy, functioning landscapes. Such landscapes not only preserve and enhance fish and wildlife values, but enhance water and air quality. Healthy soils and plant communities filter groundwater, reduce flooding, store excess carbon from the atmosphere, and release oxygen into the air. These “fringe benefits” contribute to the quality of life at the local, regional, and state levels. Invariably, the positive environmental effects of conserving healthy habitat surpass the specific goals of the entity that owns and manages the land. The purpose of the Washington Department of Fish and Wildlife lands vision report is, however, to relay the vision that connects the lands portfolio to the Department's mission and goals. Therefore, some of the “central benefits” earned from the Department's lands portfolio, including access to fish and wildlife related activities and learning opportunities, will be discussed in this section.

### Availability and Accessibility

The Washington Department of Fish and Wildlife's commitment to the availability and accessibility of fish and wildlife related recreation is demonstrated by its long-standing relationship with hunters, fishers, and wildlife enthusiasts of all kinds. While the Department has particular regulatory authorities over hunting and fishing, it has also invested resources and expertise in developing and maintaining availability of, and access to, a wide variety of activities on its lands.

The Department seeks to maintain the availability and access to high quality opportunities. For hunting and fishing, a high quality opportunity is legally and physically accessible, offers few or no restrictions, gives access to many types of fish and game, and is on a physical scale that leaves each sportsman plenty of room to ply their craft.

A high quality wildlife viewing opportunity is also legally and physically accessible; offers a unique viewing opportunity such as a migration corridor, wintering area, or area of high biodiversity; and is on a scale that accommodates wildlife viewers without crowding. The Department also facilitates availability and accessibility of wildlife related opportunities by partnering with private landowners to gain access for public hunting, fishing, and viewing opportunities. These access agreements are an innovative aspect of the Department's lands portfolio. Though they are not the specific responsibility of

the Washington Department of Fish and Wildlife, other activities (like boating, hiking, kayaking, running or camping) can be significant benefits to the public when they are consistent with the fish and wildlife management objectives of the land.

As stated above, the Washington Department of Fish and Wildlife does not intend to own or manage all the lands that provide value to fish and wildlife and related opportunities. National, state and local parks; other federal lands; and even private parks or access opportunities offer significant fish and wildlife related activities. The Department does not seek to own or manage lands that are already preserved for their recreational value. Thus, the Department will consider whether the fish and wildlife related opportunities offered by a piece of land are at risk, and can only be retained through Department of Fish and Wildlife ownership or management.

### Tools

Our understanding of fish and wildlife related opportunities is not a scientific one. There are no tools to assess fish and wildlife related opportunity that are analogous to those we use to assess benefits to fish and wildlife. Our understanding is, rather, based upon demographics, economics, and the needs expressed by our constituencies. In this regard, the many advisory councils that provide feedback to the Department are invaluable. The Washington Department of Fish and Wildlife and the Department of Community, Trade, and Economic Development produced in 2004 a report titled *Wildlife Viewing Activities in Washington: A Strategic Plan*<sup>6</sup>. This plan includes specific recommendations for new Washington Department of Fish and Wildlife initiatives that would enhance the number and quality of wildlife viewing opportunities in the state.

Also in 2004, the Washington Department of Fish and Wildlife produced a *Habitat Conservation and Recreation Plan 2004 – 2010*<sup>7</sup> that identifies the status of recreational access to its lands, as well as the general needs for recreational access on Department property. The Office of the Interagency Committee for Outdoor Recreation produced a plan more general in scope: *An Assessment of Outdoor Recreation in Washington State*<sup>8</sup>. Within this plan, the Office of the Interagency Committee provides some general recommendations to the Washington Department of Fish and Wildlife to augment and improve recreational access on its lands. Each of these tools can help to identify ways to improve the availability and accessibility of hunting, fishing, wildlife viewing, and other recreational opportunities on the Department's lands.

### **Knowledge**

The pursuit of knowledge is an important aspect of the Department's lands portfolio, and is only one of the many benefits the public can expect from state lands. The contributions that Department lands can make toward furthering research and environmental education are tremendous. Most Washington Department of Fish and Wildlife lands are accessible and host innumerable species and diverse habitats, and present opportunities such as researching predator-prey interactions, monitoring population dynamics, or observing wild salmon spawning. Because the Department preserves and manages many of its lands in their native state, these lands are not just protecting today's fish and wildlife values and related opportunities. These lands are protecting a functioning piece of Washington's natural landscape.

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<sup>6</sup> Washington Department of Fish and Wildlife and Washington Department of Community, Trade and Economic Development. *Wildlife Viewing Activities in Washington: A Strategic Plan. Report to the Washington State Legislature, March 2004.*

<sup>7</sup> Washington Department of Fish and Wildlife. *Habitat Conservation and Recreation Plan 2004 – 2010. Submitted to the Interagency Committee for Outdoor Recreation, June 2004.*

<sup>8</sup> Interagency Committee for Outdoor Recreation. *An Assessment of Outdoor Recreation in Washington State: A State Comprehensive Outdoor Recreation Planning [SCORP] Document 2002-2007. October 2002.*

They present a chance to monitor the natural world and learn about the effects our choices have on the environment.

The Washington Department of Fish and Wildlife embraces opportunities for its lands to be used to further knowledge and understanding. This can be achieved through the implementation on Department lands of research and monitoring plans. Lands within the portfolio also offer physical spaces in which to carry out environmental lessons and programs. The Department has a strong commitment to delivering scientific studies and assessments, and this commitment is bolstered by a staunch belief in the value of environmental education for citizens of all ages.

### Tools

Countless resources exist to assist in identifying and implementing research, monitoring, and environmental education plans. Researchers from universities and colleges often conduct research projects that examine the particulars of fish, wildlife, habitats, or combinations thereof. Staff from Washington Department of Fish and Wildlife regions statewide use Department lands to conduct research and monitoring. Department lands may also support research and monitoring gaps identified in species recovery plans and subbasin plans. The *Report Card on the Status of Environmental Education in Washington State*<sup>9</sup> explains the educational benefits to be derived from environmental education and contains succinct recommendations for improving the support for, and use of, environmental curriculum. The Pacific Education Institute is a complementary effort. It is a public-private partnership, supported by the Washington Department of Fish and Wildlife and many other entities, that offers support to teachers in integrating the natural and social sciences into their curricula. All of these resources can provide possibilities for creating linkages between the Department's lands and research or environmental education.

### **Economics**

In addition to the access and knowledge benefits that accrue to the public, Washington Department of Fish and Wildlife lands provide substantial economic benefits to local governments, tribes, and local enterprise<sup>10</sup>. The Department seeks to avoid causing negative impacts to the economies of surrounding areas, and instead seeks to maintain and enhance the positive economic impacts to be derived from Department owned and managed lands<sup>11</sup>.

The Department contributes directly to county government through payments in lieu of taxes (PILT) or fines from game violations, and land assessments. The Washington Department of Fish and Wildlife is the only state agency to contribute directly to local economies through payments in lieu of taxes. For Department owned areas in excess of 100 acres, county governments can elect to receive an amount equal to that currently paid on similar parcels of open space land, or choose the greater of \$.70 per acre or the per acre amount paid in 1984. Alternately, the county government may choose to receive any fines or forfeitures on game violations that are prosecuted within the county. Revenues from fines vary wildly depending on the number and seriousness of the infractions written in that area. In any case, it is incumbent upon the county to choose whether PILT or game violation fines best meets their needs. The

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<sup>9</sup> Audubon Washington. 2004. *Report Card on the Status of Environmental Education in Washington State*. As requested by the Washington State Legislature.

<sup>10</sup> For a discussion of the benefits local economies derive from Department of Fish and Wildlife lands, see *Adding It Up*. Published by the Department of Fish and Wildlife in December, 2002. It is available online at [http://wdfw.wa.gov/pubaffrs/adding\\_it\\_up.htm](http://wdfw.wa.gov/pubaffrs/adding_it_up.htm)

<sup>11</sup> For a discussion on the economic impacts of Department lands, see: McKeever/Morris, Inc. and ECO Northwest. *Social and Economic Evaluation of the Washington State Wildlife Habitat Acquisition Program: A Final Report*. Prepared for Washington State Department of Wildlife on February 18, 1993.

Department also provides payments for service assessments (e.g. fire protection, weed control, or irrigation) conducted by the county on Department owned and managed lands.

Washington Department of Fish and Wildlife lands contribute indirectly to state and local economies by providing a draw for tourism in the surrounding area. Tourism from hunting, fishing, and wildlife viewing is a major revenue source for Washington businesses, and federal and state public lands provide the primary means for pursuing these activities. In 2001 alone, 3 million state residents and nonresidents spent \$2.4 billion dollars in Washington on wildlife related recreation<sup>12</sup>, which includes the activities of hunters, anglers, and wildlife-watchers (i.e. observing, feeding, and photographing). This is a significant contribution to both state and local economies, and supports businesses from sporting goods stores, to hotels and motels, to gas stations.

Washington Department of Fish and Wildlife lands are attractive to other sorts of recreationists, as well. Some lands in the lands portfolio accommodate boating, walking, hiking, picnicking, camping, mountain biking, and even hang gliding, just to name a few activities. While the economic contribution of these forms of recreation hasn't been quantified, they provide revenue to businesses that are similar to the types that benefit from wildlife-related activities.

### Tools

A number of tools and plans exist to help ascertain the direct and indirect economic benefits to be derived from the Washington Department of Fish and Wildlife lands portfolio. The Department's own records regarding payments in lieu of taxes, as well as assessment payments, record direct contributions of the Department to county governments. The Sonoran Institute's presentation of census data for Western states and counties is another important tool<sup>13</sup>. This database presents comparisons of census data for non-metropolitan counties in the Western states in an effort to help describe the changing economy of the West, and aid in the pursuit of conservation values and economic vitality. Another valuable tool is the *National Survey of Fishing, Hunting, and Wildlife-Associated Recreation*. This is a long-running and respected survey effort, and Washington's portion reveals valuable information about the economic contribution of wildlife-related activities. Records and surveys from the local level should be consulted and included when evaluating the potential impact of the Department's lands portfolio on local governments, tribes, and enterprise.

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<sup>12</sup> U.S. Department of the Interior, Fish and Wildlife Service and U.S. Department of Commerce. U.S. Census Bureau. 2001 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

<sup>13</sup> See the Sonoran Institute's SocioEconomics Program home page at [www.sonoran.org/programs/si\\_se\\_program\\_main.html](http://www.sonoran.org/programs/si_se_program_main.html). See also the following summary publication: Rasker, Ray; Alexander, Ben; van den Noort, Jeff; and Rebecca Carter. *Prosperity in the 21<sup>st</sup> Century West: The Role of Protected Public Lands*. A Publication of the Sonoran Institute, July 2004.

## Operational Excellence

***Our Vision for the Future: All potential Department land acquisitions are evaluated based on their contribution towards the conservation of fish and wildlife and the provision of fish and wildlife related opportunities for the public; Local interests and perspectives will be solicited and accommodated to the greatest extent possible for all proposed Department acquisitions; In addition to fee-simple acquisition by the Department, management alternatives such as land preservation agreements, management agreements, and partnerships will be evaluated for all proposed Department acquisitions; The Department identifies and aggressively pursues funding sources to support operations and maintenance for all Department lands, and to manage those lands for ecological health; All Department lands will be managed to maintain the habitat values for which the property was acquired; Management plans will be developed and updated annually, with the help of local citizen advisory groups, for each Department wildlife area.***

With the Washington Department of Fish and Wildlife's ownership and management of a diverse lands portfolio comes an obligation of responsibility to the public. This responsibility requires the Department to remain fiscally accountable for its decisions and to practice sound stewardship of its lands. The Department also seeks to be accountable to the public through partnerships with other agencies, entities, and with the public at large. Not only does this represent efficient government, it represents government that keeps its finger on the pulse of the public it serves. All of these challenges are facets of the Washington Department of Fish and Wildlife's commitment to practice operational excellence in all that it does. The Department's strategic plan provides important guidance toward achieving and maintaining operational excellence because, as it indicates, "Operational and service excellence are critical to building and maintaining credibility." This portion of the lands vision report details this commitment to practice operational excellence, and identifies some of the tools that will be used to further the commitment.

### **Fiscal Accountability**

The Washington Department of Fish and Wildlife's work is funded by taxpayer contributions and by the purchase of hunting and fishing licenses, and the Department is legally obligated to manage these funds responsibly in order to remain true to the expectations of the public. This is certainly true in the case of the Department's lands portfolio. One way to remain accountable is to assure that the appropriate land management strategy is being used. Non-ownership strategies such as providing the science tools for others, managing land for another owner, or establishing a cooperative agreement with a private landowner offer ways to meet the needs of fish and wildlife and related recreation without also assuming the burden of land ownership. Land ownership (fee-simple acquisition), on the other hand, may be used by the Department to permanently protect fish and wildlife values and related recreational opportunities. It is important that the Department can explain to the public why a particular land management strategy was utilized over another.

Another component of fiscal accountability is to plan for the maintenance and operations costs of lands within the lands portfolio. There are always maintenance and operations costs and responsibilities associated with owning or managing lands, and funds to support these expenses are rarely included with the purchase or lease funds. The long-term management responsibility and the funds to support the expense of maintenance and operations of Department lands must be considered carefully before the lands are added to the lands portfolio.

Both ethics and state law require the Washington Department of Fish and Wildlife to use its funding wisely. State law prevents public agencies from paying more than the appraised value of the property. This direction is an element of fiscal accountability, and also prevents public agencies from outbidding potential private buyers. The Department only purchases land from willing sellers at fair market value and does not condemn land. Insofar as the Department is expected to provide for the operations and maintenance of its own lands, it must also consider a variety of opportunities to generate revenue from the lands portfolio. These opportunities will include developing partnerships with others and considering commercial activities, provided that these result in net benefits to fish and wildlife programs. The Washington Department of Fish and Wildlife will also continue to work with partners and the legislature to build support for state funding of operations and maintenance.

## **Stewardship**

The Washington Department of Fish and Wildlife has a responsibility to be a good steward of the lands within the lands portfolio. To be a good steward, the Department keeps the land functional and safe for the public, adds lands to the portfolio only when needed improvements or restoration are feasible and cost effective, and makes decisions that allow for effective and efficient management of the land. We strive to maintain property and habitat for the purpose for which it was purchased. Proper stewardship includes identifying and managing physical or legal liabilities that exist on the property. Whether the liability is an abandoned mine shaft or an existing lien on the property, the Department seeks to avoid, reduce, or remedy liabilities.

Lands within the lands portfolio must contribute fish and wildlife values or related opportunities consistent with the goals and objectives of the Department. Where restoration or development improvements are necessary to realize these values and opportunities, the improvements must be feasible and cost effective. Land that already exists in its healthy, natural state, and already provides a high quality recreational opportunity is a more economical addition to the lands portfolio than land that needs significant enhancement or restoration. Specific restoration activities and other land management activities for each wildlife area will be developed within specific Wildlife Area Management Plans. Department lands are managed for fish and wildlife and related recreational opportunities, and this may mean that the land is managed differently than adjacent private or other public lands. Regardless of the land management strategy that is chosen for particular Department lands, it is important to build support and appreciation for fish and wildlife and recreational values by clearly articulating that strategy and the rationale for employing it.

A particular objective of the Washington Department of Fish and Wildlife Strategic Plan is to provide sound sustainable operational management of Department lands, facilities and access sites (Objective 11). In order to meet this objective, it is necessary to make decisions that result in effective and efficient management of the land. Owning and managing contiguous or nearby lands means fewer time and staff resources must be used to maintain and operate the properties. Owning and managing lands that have similar maintenance and operations needs requires fewer types of equipment and staff expertise. The Department will strive to maintain a lands portfolio that includes the kind and amount of lands and facilities for which the Department can sustain high standards of maintenance and operations.

## **Partnership**

The citizens of the state of Washington are both the support and the guides of the Washington Department of Fish and Wildlife. The Department endeavors to be accountable to, and responsible for, the fish and wildlife related needs of the public. There is no better way to achieve this standard of operational excellence than by forming partnerships with citizens, organizations, tribes, and other

agencies. Collaboration helps the Department to be a “good neighbor” and gain insight into, and support for, the design and maintenance of the lands portfolio.

In order to create and facilitate partnerships with others, the Department must reach out to local communities and establish open lines of communication. It is important to identify actual and potential sources of support and opposition for potential additions to the lands portfolio. Reaching out to local communities may include holding or attending public meetings; meeting with local governments; or distributing information to neighbors, communities, or organizations. Reaching out in this way opens the door to gaining the support of immediate neighbors and creating collaborative land management proposals with other entities.

### Tools

A number of plans exist that can contribute toward forming and improving partnerships with other entities. Washington Department of Fish and Wildlife advisory groups and other fish and wildlife constituency organizations are valuable partners, or can point land managers toward other potential partner organizations. Community members and neighbors to the land are valuable both as partners and as resources for identifying other partners. Additionally, existing partnerships with local governments, private landowners, or non-profit organizations may be expanded to include new lands and new activities. The opportunities for collaboration are nearly limitless, and are an incredible asset and shaping force for the Washington Department of Fish and Wildlife’s lands portfolio.

## Implementation

This articulation of the Washington Department of Fish and Wildlife's lands vision is vital for upholding the responsibility, accountability, and outcomes that the public expects from the lands portfolio. Even more important, however, is the relationship of the lands vision to the daily operations of the Department. The real power of any guidance document is in its consistent implementation across regions and programs. This portion of the lands vision reports the tools and actions that are necessary to ensure that the lands vision and the attendant Department goals and needs become institutionalized in Washington Department of Fish and Wildlife practice.

### Wildlife Area Management Plans

Nearly 801,000 of the acres that the Washington Department of Fish and Wildlife manages are contained within a wildlife area (see Appendix B), and a management plan for each of these wildlife areas guides all of the activities that occur on those lands. A wildlife area management plan develops land operations that are consistent with the Department's mission, strategic plan, and the vision contained here, as well as the activities of the rest of the Department. Such a plan is the vehicle through which we work with local communities to ensure that each wildlife area provides benefits to fish and wildlife and the public and is seen by the community as an asset. It is the basis for funding and prioritizing our activities on each wildlife area, and allows us to operate these lands as efficiently and effectively as possible. It documents our intentions, provides justification for our actions, and is the record by which we communicate what can and cannot be carried out on each wildlife area. A wildlife area management plan requires broad internal and external review and input in order to be effective, credible, and supported.

Wildlife area management plans are currently being revised and updated, and all will be completed by January of 2006. Each wildlife area management plan is being developed with the input and review of local citizen advisory groups. Citizen advisory groups (CAGs) bring public input, ideas, and concerns to the land management table. CAGs represent stakeholders, neighbors, and community and regional perspectives and are an important and ongoing part of the wildlife area management planning process. The revised and updated wildlife area management plans are designed to guide all activities occurring on Department wildlife areas, and will be reviewed annually with internal, external, and CAG input. Wildlife area management plans are subject to the State Environmental Policy Act, and will be adopted through that process.

### Lands Evaluation Matrix

The point of application for the lands vision report is decision-making regarding the lands portfolio. It is in the context of decisions about specific properties and management decisions that the lands vision will be upheld or set aside. An evaluation tool has been designed and included here in order to firmly connect lands portfolio decision-making to the goals and needs expressed in the report.

#### Format

The organization and components of the lands vision report provide the framework for the accompanying evaluation matrix. Department goals and needs contribute toward fulfilling the Washington Department of Fish and Wildlife's lands vision now and in the future. The Department goals provide the major evaluation categories, and the supporting Department needs provide further elaboration in each evaluation category. Individual evaluation criteria have been gleaned from the discussions of Department needs in earlier sections of this report. These criteria are arranged beneath each Department need, and provide a tangible means of discerning the degree to which a particular

property contributes to that need. These criteria represent current understanding of society's fish and wildlife values and the responsibilities of the Washington Department of Fish and Wildlife, and they should be revised as necessary to ensure a reflection of current understanding.

Some of the criteria have been separated and put into a category called "threshold information". The information that these criteria refer to is important enough for upholding the responsibility, accountability, and expected outcomes of the lands portfolio that it represents the threshold or doorway into the lands portfolio. The lands project sponsor must provide satisfactory answers to these criteria in order to proceed through the evaluation process. These criteria are important because of the valuable information that they deliver to the Department decision-makers. It is incumbent upon each decision-maker, or group thereof, to decide what a "satisfactory" answer is and to communicate this to project proponents.

A blank lands evaluation matrix and instructions for its use can be found in Appendix A.

### Use

This evaluation tool, the lands evaluation matrix, was carefully designed to be used as an initial assessment of the degree to which a specific property contributes to the Department's vision, goals, and needs. The lands evaluation matrix should not be used to the exclusion of more specific evaluation and scrutiny. Rather, the evaluation matrix should serve as an *initial screen* of the fish and wildlife related values that a property can provide. It should be a high-level guide for Washington Department of Fish and Wildlife decision-makers as they assess whether lands project proposals contribute to the fundamental tenets of the Department's lands vision and portfolio. In addition to guiding decision-making, the evaluation matrix preserves an important record of the initial values and uses associated with a particular investment in the Department's lands portfolio. As such, completed evaluation matrices should be shared among regions, across programs, and between regional and headquarter staff. The lands evaluation matrix presents a practical way to improve communication regarding land management and ownership decisions.

The lands evaluation matrix should be used whenever and wherever decisions about the lands portfolio are made. Individuals inside and outside the Washington Department of Fish and Wildlife should use it as a guide to the attributes a property must possess, as well as the kind of information that must be included with a lands project proposal. The Department's regional directors and regional management teams should use the matrix to evaluate whether particular lands project proposals contribute toward Department goals and needs. The matrix may also be used to assist in the comparison of one lands proposal to another. Department headquarters staff and executive management should use the matrix in similar ways. In general, the lands evaluation matrix is an initial screen for the consistency of a lands portfolio decision (whether an addition or divestment of lands) with the Department's lands vision, goals, and needs.

### **Policy and Procedures**

To ensure further consistency, as well as consistent application, the Washington Department of Fish and Wildlife intends to undertake the creation of a policy and procedures regarding the lands vision and lands evaluation matrix. These documents will describe in more detail the decision-making process for changes to the lands portfolio, including additions *and* divestments. It may be desirable, for instance, to create a Director's Office Land Committee to review lands decisions and assure consistency across regions and programs. It will more thoroughly guide the Department's employees with regard to the steps they must follow, and the permission they must obtain, in order to purchase land, enter into leases or other landowner agreements, or make other decisions regarding the lands portfolio.

## **Training**

Training for Washington Department of Fish and Wildlife staff at regional and program levels is an additional way to improve the consistency with which decisions about the lands portfolio are made. Specific training regarding the use of the evaluation matrix may be necessary, and could be supplemented by workshops regarding the subsequent policy and procedures. Because land management is a tool that is used across Department programs (i.e. fish, wildlife, habitat, and facilities), existing program procedures may need to be evaluated for consistency with the lands vision, lands evaluation matrix, and lands policy and procedures.

## **Measuring Success**

The success of the lands portfolio in fulfilling the lands vision, and contributing to the Washington Department of Fish and Wildlife's mission, goals, and needs, depends upon regular review of the particular land "investments" within. Lands within the portfolio must continue to contribute to the vision, and the lands evaluation matrix can be used to guide both additions to, and *divestments from*, the portfolio. Future, comprehensive reviews of Washington Department of Fish and Wildlife lands will also use the evaluation matrix.

The success of the implementation of the vision, goals, and needs described here can also be assessed using specific performance measures. The extensions of the vision statement that are presented at the start of each chapter take the form of performance measures, and can be used to evaluate the progress the Washington Department of Fish and Wildlife makes in implementing its lands vision.

### ***Benefits to Fish and Wildlife***

We have much yet to learn about the basic needs of many of Washington's fish and wildlife species, including many of those listed for state and federal protection. A better understanding of the habitat needs of these fish and wildlife populations is needed for a citizen-supported approach to habitat protection. In turn, protecting lands across key habitats can assure Washington's rich natural heritage and biodiversity are maintained.

#### **Our Vision for the Future:**

- Basic needs, including key habitats, will be understood for species at risk;
- Wildlife-accessible habitats will exist that are sufficient to sustain species at risk, keep common species common, and assure adequate game populations;
- Each of the habitat types in Washington State will have sufficient acreage under some form of protection to assure properly functioning habitat.

### ***Benefits to the Public***

In Washington State's rapidly urbanizing society, it is increasingly important to assure that the State's traditional fish and wildlife values are shared by future generations in all areas of the state. These values can best be protected by providing all citizens access to fish and wildlife related opportunities and information, and by assuring, to the greatest extent practicable, that these opportunities benefit local and state economies.

#### **Our Vision for the Future:**

- All Washington citizens will have an opportunity to access and appreciate this state's fish and wildlife;
- Availability and access to fish and wildlife related opportunities will increase consistently with demand;

- All Washingtonians will have opportunity for a fish and wildlife educational experience;
- To the greatest extent practicable, Department lands will present a direct or indirect economic benefit to the local or state economy.

### ***Operational Excellence***

Protection of habitats and species through public ownership of lands has a history of controversy in Washington and across the nation. At the same time, Washington State has been a national leader in the protection of threatened and endangered species and their habitats, while balancing fish and wildlife related recreational and commercial opportunities. Resources available for public acquisition of lands must be spent strategically, with clearly identified goals and objectives. The Washington Department of Fish and Wildlife must demonstrate excellence in stewardship and partner with other public and private entities to maximize the benefits of lands investments.

### **Our Vision for the Future:**

- All potential Department land acquisitions are evaluated based on their contribution towards the conservation of fish and wildlife and the provision of fish and wildlife related opportunities for the public.
- Local interests and perspectives will be solicited and accommodated to the greatest extent possible for all proposed Department acquisitions;
- In addition to fee-simple acquisition by the Department, management alternatives such as land preservation agreements, management agreements, and partnerships will be evaluated for all proposed Department acquisitions;
- The Department identifies and aggressively pursues funding sources to support operations and maintenance for all Department lands, and to manage those lands for ecological health;
- All Department lands will be managed to maintain the habitat values for which the property was acquired.
- Management plans will be developed and updated annually, with the help of local citizen advisory groups, for each Department wildlife area.

## Conclusion

This report, *Lands 20/20*, conveys the Department's vision for protecting our unique quality of life by maintaining a citizen-supported portfolio of lands to sustain Washington's diverse fish and wildlife and their habitats into the next century. Components of this vision connect the Washington Department of Fish and Wildlife's land management and ownership to its legislative mandates and its strategic plan, and convey the particular ways in which maintaining public land helps the Department to meet those mandates. The Department's Vision statements include:

***Basic needs, including key habitats, will be understood for species at risk;***

***Wildlife-accessible habitats will exist that are sufficient to sustain species at risk, keep common species common, and assure adequate game populations;***

***Each of the habitat types in Washington State will have sufficient acreage under some form of protection to assure properly functioning habitat;***

***All Washington citizens will have an opportunity to access and appreciate this state's fish and wildlife;***

***Availability and access to fish and wildlife related opportunities will increase consistently with demand;***

***All Washingtonians will have opportunity for a fish and wildlife educational experience;***

***To the greatest extent practicable, Department lands will present a direct or indirect economic benefit to the local or state economy;***

***Local interests and perspectives will be solicited and accommodated to the greatest extent possible for all proposed Department acquisitions;***

***In addition to fee-simple acquisition by the Department, management alternatives such as land preservation agreements, management agreements, and partnerships will be evaluated for all proposed Department acquisitions;***

***The Department identifies and aggressively pursues funding sources to support operations and maintenance for all Department lands, and to manage those lands for ecological health;***

***All potential Department land acquisitions are evaluated based on their contribution towards the conservation of fish and wildlife and the provision of fish and wildlife related opportunities for the public.***

***Management plans will be developed and updated annually, with the help of local citizen advisory groups, for each Department wildlife area.***

This report represents an outline of our most fundamental values with respect to lands acquisition, ownership, and management. Implementation of this vision occurs at many scales, both within the Department and through inter-agency planning processes.

The Department's dual mandate (to protect fish and wildlife and related recreational opportunities) implies the use of multiple, sometimes conflicting, management strategies. It is in the development of issue- or species-specific plans that Washington Department of Fish and Wildlife staff can work to reconcile management goals and land management approaches to best achieve the objectives for particular properties, species or habitats.

Finally, the changeable nature of society's values necessitates the periodic review of the vision and goals described in this document to ensure that our portfolio continues to reflect those values, as well as changing species status, Department activities and land use. In this way, the lands vision report is truly a living document, growing and changing to reflect the values and attitudes of the public the Department serves.

# Appendix A

## Land Transaction Evaluation Matrix

*Lands 20/20: A Clear Vision For The Future. Protecting Our Unique Quality Of Life By Maintaining A Citizen-Supported Portfolio Of Lands To Sustain Washington's Diverse Fish And Wildlife And Their Habitats Into The Next Century.*

**THRESHOLD INFORMATION:** The information below must be provided in sufficient detail in order for the evaluation to proceed.

**1. Planning Integration**

Acquisition or conservation of each property must be linked to the WDFW Strategic Plan; to a local, regional, state, national, or international plan or agreement that is consistent with WDFW goals and objectives; or to a mitigation settlement signed by the Department.

**2. Alternatives to Ownership**

Alternatives to WDFW ownership or management of any property (e.g. conservation provided through land use regulations, another entity holding title, or a conservation easement) must be explored.

**3. Maintenance and Operations**

Expected maintenance and operations costs, funding sources to meet those costs, and long term management responsibilities must be identified for each property.

**4. Local Involvement**

Current and future support for, and opposition of, each project must be described.

**EVALUATION:** Each property will be evaluated using the criteria below.

DEPT. GOALS	DEPT. NEEDS	CRITERIA	SCORE
Benefits To Fish & Wildlife	Species	Necessary for Species Persistence (irreplaceable?)	40 Points Possible / 20
		Federal Endangered	
		Federal Threatened	
		State Endangered (WDFW)	
		State Threatened (WDFW)	
		Federal Candidate	
		State Species of Concern	

DEPT. GOALS	DEPT. NEEDS	CRITERIA	SCORE
		Locally Important/Ecoregional Assessment Target Species	
	Habitat	(Ecosystem Context)	/ 10
		Protects Ecosystem Processes and Functions	
		Contributes to Landscape Integrity	
		Contributes to a Migratory or Connectivity Corridor	
		Contributes to Harvestable Fish and Wildlife Populations	
		Risk to Fish and Wildlife Value of Property	
	Biodiversity		/ 10
		Species Richness	
		Complexity of Habitats	
		Conservation Priority in an Ecoregional Assessment	
<b>Benefits to Fish and Wildlife Subtotal</b>			<b>/ 40</b>
<b>Benefits To The Public</b>			<b>40 Points Possible</b>
	Availability/Accessibility		/ 25
		Hunting Opportunity	
		Fishing Opportunity	
		Wildlife Viewing Opportunity	
		Other Recreation Opportunity	
		Risk to Recreational Value of Property	
	Knowledge		/ 5
		Research & Monitoring	
		Environmental Education	
	Economics		/ 10
		Effect on Tribes & Local Governments	
		Effect on Local Enterprise	
<b>Benefits to the Public Subtotal</b>			<b>/ 40</b>
<b>Operational Excellence</b>			<b>20 Points Possible</b>
	Fiscal Accountability		/ 5
		Revenue Generation	
	Stewardship		/ 5
		Liabilities Identified	
		Feasibility (Cost & feasibility of necessary restoration, facility construction, etc.)	
		Management Efficiency	

DEPT. GOALS	DEPT. NEEDS	CRITERIA	SCORE
		<b>Partnership</b>	<b>/ 10</b>
		Outreach to Community	
		Support from Immediate Neighbors	
		Collaboration with Other Entities	
		<b>Operational Excellence Subtotal</b>	<b>/ 20</b>
		<b>TOTAL SCORE</b>	<b>/ 100</b>

## Appendix B WDFW Wildlife Areas

<i>WILDLIFE AREA</i>	<i>ACRES</i>	<i>COUNTY</i>	<i>FIRST ACQUISITION</i>
Chelan	27,812	Chelan	1965
Chief Joseph	41,312	Asotin	1962
Colockum	104,918	Chelan/Kittitas	1953
Columbia Basin	182,125	Grant/Adams	1952
Cowlitz	13,940	Lewis	1991
Klickitat	14,057	Klickitat	1948
Lake Terrell	2,687	Whatcom	1942
LT Murray	96,993	Kittitas	1966
Methow	34,017	Okanogan	1941
Oak Creek	41,586	Yakima/Kittitas	1940
Olympic	4,061	Grays Harbor	1952
Sagebrush Flat	8,616	Douglas	1991
Scatter Ck / S Puget Snd	4,730	Pierce/Thurston	1966
Scotch Creek	16,853	Okanogan	1991
Sherman Creek	9,941	Ferry/Pend Oreille	1948
Shillapoo	1,550	Clark	1952
Sinlahekin	16,024	Okanogan	1939
Skagit	13,136	Skagit/Snohomish	1948
Snoqualmie	2,031	King/Snohomish	1964
St. Helens	2,533	Cowlitz	1989
Sunnyside	11,052	Benton/Yakima	1947
Swanson Lakes	20,476	Lincoln	1990
Wells	9,962	Douglas	1968
Wenas	104,087	Yakima/Kittitas	1951
Wooten	16,492	Columbia/Garfield	1941
<b>TOTAL</b>	<b>800,991*</b>		

Updated to 12/31/2004 \*does not include hatcheries, public access fishing sites or administrative sites

## Appendix C

### WDFW Land Ownership and Control by County

#### January 2005

COUNTY	ACRES OWNED	ACRES CONTROLLED	TOTAL ACRES MANAGED
ADAMS	1,150.60	1,972.52	3,123.12
ASOTIN	31,075.30	10,235.05	41,310.35
BENTON	5,808.00	0.10	5,808.10
CHELAN	28,254.93	9,701.10	37,956.03
CLALLAM	735.33	340.87	1,076.20
CLARK	2,949.78	24.43	2,974.21
COLUMBIA	10,832.20	881.50	11,713.70
COWLITZ	4,269.30	1,243.18	5,512.48
DOUGLAS	13,844.52	1,532.90	15,377.42
FERRY	6,902.20	1,202.81	8,105.01
FRANKLIN	1,774.20	6,538.68	8,312.88
GARFIELD	6,934.40	121.10	7,055.50
GRANT	39,168.20	143,204.93	182,373.13
GRAYS HARBOR	5,759.20	334.84	6,094.04
ISLAND	60.50	21.18	81.68
JEFFERSON	1,396.97	98.58	1,495.55
KING	1,192.72	89.65	1,282.37
KITSAP	1,062.50	28.40	1,090.90
KITTITAS	144,533.52	72,566.59	217,100.11
KLICKITAT	13,165.70	3,221.60	16,387.30
LEWIS	410.00	1,153.84	1,563.84
LINCOLN	19,197.60	1,307.02	20,504.62
MASON	1,111.62	105.25	1,216.87
OKANOGAN	64,869.41	13,436.73	78,306.14
PACIFIC	3,518.44	59.83	3,578.27
PEND OREILLE	745.70	257.05	1,002.75
PIERCE	3,557.17	100.86	3,658.03
SAN JUAN	226.40	0.00	226.40
SKAGIT	11,382.20	1,309.13	12,691.33
SKAMANIA	311.72	223.80	535.52
SNOHOMISH	2,511.70	462.57	2,974.27
SPOKANE	175.60	8.77	184.37
STEVENS	261.90	208.89	470.79
THURSTON	1,667.90	160.70	1,828.60
WAHKIAKUM	247.90	57.23	305.13
WALLA WALLA	209.00	235.90	444.90
WHATCOM	2,859.60	1,003.44	3,863.04
WHITMAN	2,291.00	36.63	2,327.63
YAKIMA	75,898.25	44,620.66	120,518.91
<b>GRAND TOTALS</b>	<b>512,323.18</b>	<b>318,108.31</b>	<b>830,431.49</b>

**Appendix D**  
**2004 WDFW Payments In Lieu of Taxes**  
**& Assessments Paid to Counties**

<b>COUNTY</b>	<b>4/1/04 PILT ACRES</b>	<b>2004 PILT PAID</b>	<b>2004 ASSESSMENTS PAID</b>	<b>TOTAL PAID TO COUNTY in 2004</b>
ADAMS	0.00	\$0.00	\$10,718.72	\$10,718.72
ASOTIN	29,277.88	\$22,297.61	\$0.00	\$22,297.61
BENTON	0.00	\$0.00	\$2,812.39	\$2,812.39
CHELAN	26,789.83	\$18,752.88	\$0.00	\$18,752.88
CLALLAM	0.00	\$0.00	\$1,204.41	\$1,204.41
CLARK	0.00	\$0.00	\$8,859.70	\$8,859.70
COLUMBIA	10,794.13	\$7,555.91	\$1,746.97	\$9,302.88
COWLITZ	0.00	\$0.00	\$834.82	\$834.82
DOUGLAS	0.00	\$0.00	\$0.00	\$0.00
FERRY	6,866.13	\$6,781.33	\$705.10	\$7,486.43
FRANKLIN	0.00	\$0.00	\$19,424.52	\$19,424.52
GARFIELD	6,914.26	\$4,839.98	\$553.14	\$5,393.12
GRANT	39,076.00	\$37,443.16	\$24,148.17	\$61,591.33
GRAYS HARBOR	3,248.00	\$7,473.66	\$0.00	\$7,473.66
ISLAND	0.00	\$0.00	\$0.00	\$0.00
JEFFERSON	0.00	\$0.00	\$0.00	\$0.00
KING	0.00	\$0.00	\$20,825.50	\$20,825.50
KITSAP	0.00	\$0.00	\$1,064.80	\$1,064.80
KITTITAS	148,762.02	\$115,909.16	\$5,703.34	\$121,612.50
KLICKITAT	13,106.35	\$21,416.95	\$760.26	\$22,177.21
LEWIS	0.00	\$0.00	\$0.00	\$0.00
LINCOLN	19,470.36	\$13,629.25	\$1,902.08	\$15,531.33
MASON	0.00	\$0.00	\$450.00	\$450.00
OKANOGAN	60,293.16	\$75,736.87	\$8,403.77	\$84,140.64
PACIFIC	0.00	\$0.00	\$333.80	\$333.80
PEND OREILLE	614.00	\$3,308.65	\$0.00	\$3,308.65
PIERCE	0.00	\$0.00	\$7,909.34	\$7,909.34
SAN JUAN	0.00	\$0.00	\$275.00	\$275.00
SKAGIT	0.00	\$0.00	\$25,157.40	\$25,157.40
SKAMANIA	0.00	\$0.00	\$0.00	\$0.00
SNOHOMISH	0.00	\$0.00	\$10,735.78	\$10,735.78
SPOKANE	0.00	\$0.00	\$1,018.75	\$1,018.75
STEVENS	0.00	\$0.00	\$0.00	\$0.00
THURSTON	1,131.00	\$5,107.61	\$11,451.18	\$16,558.79
WAHKIAKUM	0.00	\$0.00	\$0.00	\$0.00
WALLA WALLA	0.00	\$0.00	\$12.00	\$12.00
WHATCOM	0.00	\$0.00	\$69.24	\$69.24
WHITMAN	0.00	\$0.00	\$0.00	\$0.00
YAKIMA	70,130.23	\$88,792.82	\$44,933.61	\$133,726.43
<b>GRAND TOTALS</b>	<b>436,473.35</b>	<b>\$429,045.84</b>	<b>\$212,013.79</b>	<b>\$641,059.63</b>

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## DNR, Parks and WDFW Habitat and Recreation Land Acquisitions, 1980-2005

<b>Adams County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	122	0	122
	WDFW	1,111	2	1,113
	Parks	0	917	917
	<b>Total</b>	<b>1,233</b>	<b>919</b>	<b>2,152</b>

<b>Asotin County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	-337	-337
	WDFW	26,220	67	26,287
	Parks	0	337	337
	<b>Total</b>	<b>26,220</b>	<b>67</b>	<b>26,287</b>

<b>Benton County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	0	0
	WDFW	2,080	6	2,086
	Parks	0	0	0
	<b>Total</b>	<b>2,080</b>	<b>6</b>	<b>2,086</b>

<b>Chelan County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	3,577	0	3,577
	WDFW	1,214	2	1,216
	Parks	0	261	261
	<b>Total</b>	<b>4,791</b>	<b>263</b>	<b>5,054</b>

<b>Clallam County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	427	-3,815	-3,388
	WDFW	432	14	446
	Parks	0	4,110	4,110
	<b>Total</b>	<b>859</b>	<b>309</b>	<b>1168</b>

<b>Clark County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	-602	-602
	WDFW	1,971	46	2,017
	Parks	0	308	308
	<b>Total</b>	<b>1,971</b>	<b>-248</b>	<b>1,723</b>

<b>Columbia County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	0	0
	WDFW	1,527	0	1,527
	Parks	0	0	0
	<b>Total</b>	<b>1,527</b>	<b>0</b>	<b>1,527</b>

<b>Cowlitz County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	114	-397	-283
	WDFW	2,913	16	2,929
	Parks	0	326	326
	<b>Total</b>	<b>3,027</b>	<b>-55</b>	<b>2,972</b>

<b>Douglas County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	-3,206	0	-3,206
	WDFW	11,966	0	11,966
	Parks	0	186	186
	<b>Total</b>	<b>8,760</b>	<b>186</b>	<b>8,946</b>

<b>Ferry County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	0	0
	WDFW	-11	0	-11
	Parks	0	0	0
	<b>Total</b>	<b>- 11</b>	<b>0</b>	<b>-11</b>

<b>Franklin County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	240	0	240
	WDFW	5,475	0	5,475
	Parks	0	2,119	2,119
	<b>Total</b>	<b>5,715</b>	<b>2,119</b>	<b>7,834</b>

<b>Garfield County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	0	0
	WDFW	1,243	0	1,243
	Parks	0	0	0
	<b>Total</b>	<b>1,243</b>	<b>0</b>	<b>1,243</b>

<b>Grant County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	0	0
	WDFW	1,241	1,073	2,314
	Parks	0	258	258
	<b>Total</b>	<b>1,241</b>	<b>1,331</b>	<b>2,572</b>

<b>Grays Harbor County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	8,560	0	8,560
	WDFW	938	228	1166
	Parks	0	283	283
	<b>Total</b>	<b>9,498</b>	<b>511</b>	<b>10,009</b>

<b>Island County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	-3,099	-3,099
	WDFW	13	-147	-134
	Parks	0	2,661	2,661
	<b>Total</b>	<b>13</b>	<b>-585</b>	<b>-572</b>

<b>Jefferson County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	3,057	-456	2,601
	WDFW	422	749	1171
	Parks	0	212	212
	<b>Total</b>	<b>3,479</b>	<b>505</b>	<b>3,984</b>

<b>King County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	15,430	-4,502	10,928
	WDFW	81	7	88
	Parks	0	5,229	5,229
	<b>Total</b>	<b>15,511</b>	<b>734</b>	<b>16,245</b>

<b>Kitsap County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	572	-1,936	-1,364
	WDFW	743	169	912
	Parks	0	372	372
	<b>Total</b>	<b>1,315</b>	<b>-1,395</b>	<b>-80</b>

<b>Kittitas County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	-562	-562
	WDFW	9,606	-10	9,596
	Parks	0	3,327	3,327
	<b>Total</b>	<b>9,606</b>	<b>2,755</b>	<b>12,361</b>

<b>Klickitat County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	7,453	-400	7,053
	WDFW	2,520	0	2,520
	Parks	0	4,149	4,149
	<b>Total</b>	<b>9,973</b>	<b>3,749</b>	<b>13,722</b>

<b>Lewis County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	-202	-202
	WDFW	0	4	4
	Parks	0	743	743
	Total	0	545	545

<b>Lincoln County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	235	0	235
	WDFW	18,559	0	18,559
	Parks	0	66	66
	Total	18,794	66	18,860

<b>Mason County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	749	-337	412
	WDFW	201	366	567
	Parks	0	613	613
	Total	950	642	1592

<b>Okanogan County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	27,952	0	27,952
	WDFW	37,573	224	37,797
	Parks	0	126	126
	Total	65,525	350	65,875

<b>Pacific County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	7,371	-855	6,516
	WDFW	2,411	51	2,462
	Parks	0	1,937	1,937
	Total	9,782	1,133	10,915

<b>Pend Oreille County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	0	0
	WDFW	0	0	0
	Parks	0	0	0
	Total	0	0	0

<b>Pierce County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	-898	-898
	WDFW	3,170	5	3,175
	Parks	0	1,392	1,392
	Total	3,170	499	3,669

<b>San Juan County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	169	-569	-400
	WDFW	5	0	5
	Parks	0	893	893
	Total	174	324	498

<b>Skagit County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	7,035	-1,246	5,789
	WDFW	1,434	5	1,439
	Parks	0	1,288	1,288
	Total	8,469	47	8,516

<b>Skamania County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	3,183	-116	3,067
	WDFW	0	57	57
	Parks	0	440	440
	Total	3,183	381	3,564

<b>Snohomish County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	26,308	-3,590	22,718
	WDFW	274	96	370
	Parks	0	3,231	3,231
	Total	26,582	-263	26,319

<b>Spokane County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	170	-240	-70
	WDFW	0	-158	-158
	Parks	0	3,712	3,712
	Total	170	3,314	3,484

<b>Stevens County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	290	0	290
	WDFW	130	-1	129
	Parks	0	156	156
	Total	420	155	575

<b>Thurston County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	1,593	-1,020	573
	WDFW	133	1	134
	Parks	0	140	140
	Total	1,726	-879	847

<b>Wahkiakum County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	1,176	0	1,176
	WDFW	25	9	34
	Parks	0	0	0
	<b>Total</b>	<b>1,201</b>	<b>9</b>	<b>1,210</b>

<b>Walla Walla County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	0	0
	WDFW	0	205	205
	Parks	0	0	0
	<b>Total</b>	<b>0</b>	<b>205</b>	<b>205</b>

<b>Whatcom County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	-113	-741	-854
	WDFW	1,232	1	1,233
	Parks	0	854	854
	<b>Total</b>	<b>1,119</b>	<b>114</b>	<b>1,233</b>

<b>Whitman County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	0	0	0
	WDFW	0	0	0
	Parks	0	226	226
	<b>Total</b>	<b>0</b>	<b>226</b>	<b>226</b>

<b>Yakima County</b>	<b>Agency</b>	<b>Habitat Acres</b>	<b>Recreation Acres</b>	<b>Total Acres</b>
	DNR	595	0	595
	WDFW	1,166	884	2,050
	Parks	0	56	56
	<b>Total</b>	<b>1,761</b>	<b>940</b>	<b>2,701</b>

**F**

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**F**

January 13, 2005

MEMORANDUM

TO: SSB 6242 Inventory Subcommittee  
FROM: Gary Cooper, Project Manager  
SUBJECT: Narrative Summary of SSB 6242 Inventory Spreadsheet

What follows is an overview of what we want to accomplish with the inventory and an explanation of the type of information that we are including in the database.

◦ Goals and Objectives of the Inventory

The information in the inventory should answer, or at least address, some of the larger themes of SSB 6242. For example, the discussion of whether or not acquisitions are occurring in disproportionate amounts in some parts of the state versus others can at least be initiated by looking at the number of acres of acquisitions in each county. The question of whether or not the acres represent a “disproportionate” amount won’t be answered by the inventory. This question would have to be addressed by examining the reasons behind acquisitions that relate more to the mission of a particular agency or program, or by looking at the tax impacts versus economic benefits questions that SSB 6242 is raising. In the same vein, questions related to tax impacts, legislative oversight, etc. can all be brought into greater focus by having the data at hand to begin the broader policy or procedural discussions that need “facts” to guide them.

The inventory will collect data that can be applied at several levels of focus, ranging from all land transactions (no matter whether it is an agency or a local government) between 1980-2004, to something very specific (e.g., all the PILT payments in Skamania County by WDF&W).

The general hierarchy will be as follows:

1. All transactions [agencies + local governments + land trusts, etc.]
2. All agencies [DNR + WDF&W + Parks]
3. All Local governments
4. All Land Trusts, etc.
5. Individual agencies:
  - a. DNR
  - b. WDF&W
  - c. Parks
6. Individual agency programs (e.g., DNR’s Natural Areas Program).
7. Counties [for each county]
  - a. All transactions [agencies + local governments + land trusts, etc.]
  - b. All transactions by agencies.

- c. All transactions by local governments.
- d. All transactions by land trusts, etc.
- e. All transactions by individual agency programs.

Within each of the categories in the above hierarchy more specific queries will be done by the database. For example, within the "All Transactions" category the data will be presented at several levels, including all 1) transactions combined, 2) transactions sorted by habitat versus recreation, etc.

- Narrative Summary of the Inventory

NOTE: Attached is an explanatory spreadsheet that should be referenced as a companion to this narrative

#### Receiver & Conveyer

In these columns we want the names of the agencies (DNR, WDF&W, etc.), private parties (Jones, etc.), local governments (Chehalis, Okanagon County, etc.), and nonprofits (The Nature Conservancy, Douglas County Land Trust, etc).

#### PRISM Number

Including the PRISM number will make it more possible for us to tie transactions together in a way that will help us QA/QC the data. Because IAC has many of the transactions in its PRISM database, we should be able to compare agency submissions with the PRISM information. This should also help us to prevent double recording of information when there are exchanges between agencies.

#### Site Name

Site name will also be useful in helping us to QA/QC the information submitted.

#### Type of Transaction

Per the language of SSB 6242, this column is asking whether the transaction was a purchase, gift, disposal, or an exchange. Because exchanges are both disposals and acquisitions, they should be reported as both an acquisition and a disposal on separate lines. The property being conveyed is an "exchange-disposal," and the property being received is an "exchange acquisition." In those cases where there is not a straight swap, where one agency actually pays a certain amount of money, that will be tracked in the "Transaction Amount" column (i.e., it will still be entered as an exchange and not a purchase, but costs of the exchange will be captured).

- Examples of how to code certain kinds of transactions

Transfers – such as when Parks transfers property to a local government – should be recorded as “disposals.”

Transfers from the trust to another program within DNR would be both a disposal from the Trust and an acquisition by the receiving program. Transfers from the Trust to a local government or nonprofit would be a disposal.

#### Type of Interest

SSB 6242 wants only those transactions that are fee simple, or an interest greater than 50 years. Within those parameters there are fee simple purchases, easements, and leaseholds. If you enter the type of transaction as an easement, we will assume the interest is greater than 50 years.

#### Transaction Amount

This column should record either the cost of the purchase or the amount received. There are some exceptions to what should be recorded under “costs.” First, we are not including administrative or closing costs because not every agency has this documented. We are considering using a multiplier (say 15%) to estimate these costs when we complete the report. Also, keep in mind that this column is only tracking costs and not value. There are some transactions that include donations, but we are not including the donated value. This will be noted in the report. We don’t include this because SSB 6242 does not ask for it, and because it becomes very complicated once we try to capture value as opposed to cost.

#### S/T/R

Section, Township and Range is important information for being able to create a general map of the location of the transactions. I realize that this will only provide a certain amount of detail, but could be important for showing not only the trends with respect to land acquisitions, but also the general location within the counties. We are requesting that this information be entered in the S/T/R format.

#### Tax Compensation Type

This category is primary for capturing the Payments in Lieu of Taxes from WDF&W. Any property that receives a PILT payment should be documented. Of course, any type of compensation from other agencies should be included here.

#### Tax Compensation Amount

Because SSB 6242 is in part wanting to address the negative impacts that public land ownership has on the local tax base, it is very important to be able to demonstrate, wherever possible, the amount of money that the state is paying to offset the loss of property taxes. It is my understanding that WDF&W does not track this information by

parcel, but rather by annual payments made to counties. I am open to the idea that we may need to document that information in another spreadsheet or database. Perhaps we could document the information by annual payment per county per year.

#### Fund Source & Appropriation Authority

SSB 6242 requires us to report the fund source, but it serves an additional purpose for our report. Fund source is also a key indicator of how the transaction was authorized by the legislature (another key issue of SSB 6242). You can see that we have tried to predict as many fund sources as possible on the attached example spreadsheet. For the majority of these fund sources we (IAC) can automatically populate the next column, "Appropriation Authority."

We are capturing this information about appropriation authority to get a clearer picture of the number/percentage of transactions that receive some sort of legislative oversight, versus those that are processed primarily through OFM as unanticipated receipts. In addition, we will be documenting the type of legislative oversight, according to the manner in which a particular grant program receives its appropriation authority from the legislature. For example, WWRP grants are taken to the legislature as a list of projects that the legislature approves. For this reason, the appropriation authority is in the form of an "approved list." SFRB grants, by contrast, are not reviewed as part of a list. These grants are awarded by the SFRB from a pot of money that is allotted to them by the legislature. For this reason, properties acquired through the SFRB are acquired through an "omnibus" appropriation. When appropriation authority is "statutory," it means that no appropriation authority was required and that the transaction was allowed under existing agency statute (I understand this to be the case for exchanges). Last, "budget line item" refers to those acquisitions that were completed as a line item within an agency's budget.

We have linked the majority of the fund sources to the appropriation authority and can automatically populate that information. However, acquisitions that were processed as an unanticipated receipt must be indicated by your agency.

Note: For any acquisition that used more than one grant (e.g. a federal grant combined with a state grant), if one of the grants required some form of legislative appropriation, that appropriation will be identified in the appropriation authority column. So, if an acquisition was funded by both the US Fish & Wildlife Service and WWRP, the appropriation authority will be "approved list."

#### Primary Use

Although it would be ideal to document all the uses of a particular property, we have decided that this column should simply record whether the property was purchased primarily for habitat or recreation.

## Use Type

This column will identify the program within each agency that acquires lands suited to its particular mandate. For example, NAP acquisitions are more restrictive in their allowed uses than NRCAs. WDF&W acquisitions purchased under the Wildlife Area Program will be primarily for the purpose of habitat, but also come with a bundle of allowed recreational uses, such as hunting.

NOTE: If you have any information of Use Types that should be included in this category, please provide it as soon as possible.



**G**

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**G**



WASHINGTON STATE DEPARTMENT OF  
**Natural Resources**

Doug Sutherland - Commissioner of Public Lands



Washington  
Department of  
**FISH and  
WILDLIFE**

## Proposed State DNR – Fish & Wildlife Land Exchange

Most of the 1.4 million acres of state trust lands in Eastern Washington managed by the State Department of Natural Resources (DNR) still reflect the checkerboard ownership pattern of the original federal land grants to the state in 1889.

DNR and other landowners have long recognized the importance of realigning ownership patterns, creating efficiencies for each landowner. It is increasingly challenging to manage across the landscape of intermingled ownerships for income generation, protection of wildlife habitat, forest health, recreation, cultural, and other social values.

In two large Eastern Washington checkerboard landscapes, the state trusts and the Department of Fish and Wildlife (WDFW) own every other square mile in a 170,000-acre landscape with very different management goals:

- WDFW owns (with federal deed restrictions) about 45,000 acres of forestlands interspersed among DNR-managed state trust properties. They are managed for wildlife habitat and to offer wildlife-related recreation.
- State trusts own 125,000 acres of shrub steppe habitat interspersed among WDFW-managed lands. DNR must manage the trust lands to provide revenue primarily supporting the state's education – funding construction of the public kindergarten through high schools and universities, state hospitals, prisons and charitable institutions, and buildings at the Capitol.

### **WDFW leases cost taxpayers \$360,000 per biennium**

For 40 years, WDFW has leased the 125,000 acres of mostly shrub steppe habitat, and managed the lands as their own for fish and wildlife and related recreation. Leases, primarily in Kittitas, Yakima and Chelan Counties, historically have been paid with \$360,000 per biennium of general tax dollars.

Beginning in the 2003-2005 biennium, most lease funding (\$135,000) was cut as a part of WDFW's \$1.4 million reduction in general funding. This means that DNR, as trust land manager, must find new lessees for these trust lands. Waiting for years to exchange the lands likely will risk DNR's converting some properties to other uses to bring in needed trust revenue.

### **Exchange pays for itself in about 6 to 8 years**

Desiring increased efficiency and cost savings, DNR and WDFW have developed an exchange concept to consolidate ownerships — creating more manageable landscapes for each, and matching resource lands with appropriate uses to further improve management effectiveness. (See maps.)

The WDFW lands proposed for exchange originally were purchased with US Fish and Wildlife Service Pittman Robertson Funds, and federal Land and Water Conservation Funds from the National Park Service.

### **Federal deed encumbrances on WDFW lands require appraisal process**

Federal law requires that prior to sale or exchange, these WDFW lands (purchased with federal grants) be appraised according to "Uniform

**More →**

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Appraisal Standards for Federal Land Acquisition.” Third party appraisals are anticipated to cost about \$1 million, which currently is sought by both agencies in the 2005-2007 capital budget request to the state legislature.

If all parts of the exchange take place, the state avoids expending from \$675,000 to \$900,000 in lease fees within just five years. The exchange would pay for itself in six to eight years.

But the benefit is not just financial. Consolidated ownership better accommodates long-term planning for the trusts, for the public, and for fish and wildlife as well. Road management and abandonment activities, endangered and threatened fish and wildlife habitat restoration and management for the long term, forest health, wildfire, timber management, and public recreation are all more effectively and efficiently supported at the landscape level.

DNR's movement of trust assets into the forested landscape will help generate more long-term funds for the trust, strengthening funding for school construction projects. DNR and WDFW have worked with state trust beneficiaries, Fish and Wildlife Commission, Legislators, local officials and communities to discuss the benefits of the exchange.

#### **Overall public benefits**

- Allows DNR and WDFW to manage lands best suited to their missions:
  - Forested lands to state trusts to be managed on a landscape basis for revenue generation as well as for spotted owl and other habitat, and better forest health — including increased resistance against wildfires.
  - Areas with big game and shrub steppe habitat to WDFW, providing better management for uncommon species, for big game and for maintaining or increasing wildlife carrying capacity.
- Roads across landscapes will be more cost-effectively maintained under separate ownerships.
- Consistent expectation for public access and hunting rules will be more easily understood and enforced.
- Avoids the need for the state to invest the millions of dollars in fencing it would take to prevent grazing herds from moving across mixed ownerships.
- Habitat is protected — avoids barriers that interfere with wildlife movement and protects sage grouse and other at-risk species.
- Tax revenue may increase slightly to state and local governments from increased PILT

#### **Benefits to Trusts**

- More productivity — DNR will dispose of scattered trust timber and shrub steppe rangeland tracts with low long-term revenue potential for trust beneficiaries. In return, DNR would receive replacement lands for the trusts with improved revenue potential.
- More revenue — After the transaction occurs, it is anticipated that each year DNR could earn potentially \$1.5 million more for trust beneficiaries.
- Less management cost — Other than improved revenue, with fewer scattered parcels, continuing financial benefit for the trusts would include eliminating property survey costs, reduced road planning and right of ways costs, and concentration of management oversight, equaling roughly \$1.5 million.
- Improved Forest health — DNR will be able to improve forest health — benefits measured through reducing or preventing catastrophic wildfire as well as creating higher quality wildlife habitat for northern spotted owl, lynx, etc.

#### **WDFW benefits**

- More productivity at a landscape level — Consolidating land holdings would offer more effective management of habitat and activities at the landscape level.
- Less Cost — No more yearly lease fees for use of state trust lands that are paid by the State General Fund, and no need of fencing to control livestock.

- Better habitat — WDFW will acquire good shrub-steppe habitat for wildlife purposes and appropriate public use — for example, sage and sharp-tailed grouse recovery.



**H**

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**H**

**Report to the Washington State Interagency  
Committee for Outdoor Recreation**

**Local Government Taxes and the Impact of  
Habitat and Recreation Land Acquisitions  
On Local Property Taxes**



**Burrows & Associates, Tax & Economic Consulting  
Tumwater, Washington**

June 2005

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## Foreword and Acknowledgements

This study was commissioned by the Washington State Interagency Committee for Outdoor Recreation (IAC). The legislature provided for the study when it passed Senate Bill 6242 during the 2004 legislative session. Among things to be studied is how the ownership of public lands and, in particular, the acquisition of habitat and recreation lands has impacted local government tax revenues and local economies. The bill called for a study of alternative ways of compensating local governments *“by spreading statewide the impact of lost tax revenues from acquisition of property for habitat and recreation.”*

The IAC awarded two contracts to make the study. A separate report was prepared by RMecon, Resource & Environmental Economics, Davis CA. The **RMecon Report** examines the broader questions of the how the uses of state habitat and recreation lands impact local economies, local taxes, the environment, etc. The RMecon Report also examines mechanisms for measuring the impact on local economies and local taxes resulting from the acquisition of habitat and recreation land.

This portion of the study is concerned primarily with the direct impact on local government property taxes as a result of the acquisition of state property. In particular, it examines the question of lost property tax revenues versus the shifting of the reduced revenues to other taxpayers in the taxing districts affected by the acquisition. Other questions considered in this part of the study are: What is the general tax and economic picture for local governments now? Are there distinctive factors in Washington’s tax laws that adversely affect Local government when the state purchases land? Whether tax limit laws, such as the 1% increase limit, is making state acquisition of land a more critical issue? How can any negative impacts on local revenues be distributed statewide? What other ways can be used to compensate local governments?

The author wishes to thank staff members of several state agencies for providing information, including: Linda Kercher, Community Development; Tom King, County Commissioners Association; Jim Skalski, Financial Management; Dan Budd, Fish and Wildlife; Larry Fairleigh and his staff, Parks; Craig Calhoon and Penny Speaks, Natural Resource; and, Margaret Knudsen, Don Gutmann, Peri Maxey, and Don Taylor, Revenue.

Background information provided by Senator Parlette, the prime sponsor of SB 6242, was very helpful in understanding the issues to be considered. Yakima County Assessor Dave Cook, who is the current president of the County Assessors Association, provided the county assessors perspective in dealing with Washington’s complex property tax laws. Thanks also to the members of the advisory committee: Gary Cooper (IAC), Michelle Hagan (County Officials Association), Eric Johnson (Lewis County Commissioner), Carole Richmond (IAC), Bill Robinson, (Nature Conservancy); and Ron Walters, (Chelan County Commissioner) for their helpful comments.

Don Burrows, Principal  
Burrows & Associates  
June, 2005

## **Part I. Summary of Findings, Conclusions and Recommendations<sup>1</sup>**

### **1. Fiscal Condition and Tax Sources of Local Governments**

- Local governments may only impose taxes authorized by the legislature and the rates of those taxes are limited by state law.
- Most local governments are fully utilizing their available tax sources.
- Most local governments in Washington are currently facing revenue shortfalls. Recently enacted laws have reduced and placed new limits on tax revenues available to local governments.
- The per capita revenue produced by the two major local government tax sources (i.e., property and retail sales taxes) varies considerably from city to city and county to county. Although most counties and cities are having revenue shortfalls, those with low tax bases (i.e., on a per capita basis) are most often having difficulty raising sufficient revenues needed for essential government services.
- Tax exemptions of both public and private properties reduce the property tax base and result in lost revenue to local governments and the shifting of taxes to other taxpayers.
- However, the direct impact of new habitat and recreation land acquisitions on local government property taxes has been minimal compared to the adverse impact of the 1 percent property tax revenue increase limit law.

### **2. Counties Fiscal Capacity Compared with Percent of Public Lands**

A county by county comparison of the counties' two major tax bases, the property tax and sales tax, with the percent of the state and federal property in the counties and the percentage of habitat and recreation property indicates the following:

- Counties with the greatest percentage of public lands tend to have larger per capita property and sales tax bases than the average tax bases of all counties. That is, they are able to derive more in per capita revenues from these taxes than the average county.

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<sup>1</sup> This part of the study analyses the direct impact on property tax revenues from the state's acquisition of habitat and recreation land. The indirect impacts of the state's acquisitions and ownership of habitat and recreation land on the economies and taxes of local governments are discussed in the **RMecon Report**.

- The data suggest that, on average, counties with large percentages of habitat and recreation property are benefiting from sales taxes paid by tourists in their counties. For example, these counties have, on average, higher per capita sales tax bases than the average for all 39 counties.
- Counties with the smallest percent of federal and state lands and habitat and recreation lands tend to have smaller property and sales tax bases than the average tax bases of all counties.
- The data indicate that most counties with large amounts of public land tend not to have restricted tax bases.
- Not all counties with large amounts of public land ownership have larger per capita property and sales tax bases. Conversely, not all counties with low percentages of public land ownership have smaller tax bases. Other factors, which are unique to each county, contribute to the variations in local tax bases.

### **3. Policies on Replacing Revenues from Property Tax Exemptions**

Legislative policy in replacing revenues from property tax exemptions has varied over the years.

- The legislature has not as a general rule provided compensating revenues to local governments in the case of private property exemptions or mandated reductions in assessed values (e.g., retired persons' exemption and the reduced values resulting from current use assessments).
- On the other hand, there are several programs that provide for state payments to local government in the case of state owned exempt property.
- The most recent program for state payments to local governments was included in legislation passed in 2005. The new law provides for certain in lieu of tax payments to local governments by the state treasurer for habitat and natural area lands managed by the Department of Natural Resources.<sup>2</sup>

### **4. Impact of State Acquisition of Property and “Lost Revenues”**

- Approximately 90 percent of revenue lost from property tax exemptions is shifted to other taxpayers in the affected taxing districts.<sup>3</sup>

<sup>2</sup> ESSB 5396 requires the state to make in lieu of tax payments for the amount of local taxes that would have been paid had the land been assessed and taxed under the Open Space law ( chapter 84.34 RCW).

<sup>3</sup> Of course, as land is taken off the tax roll and used for other purposes (e.g., habitat and recreation), there are usually indirect impacts on tax revenues and the economies of the affected area. (See **RMecon Report** in this appendix)

- In the case of special levies and the state government's regular property tax levy, the revenue lost from property tax exemptions is shifted to other taxpayers.
- Tax shifting of the majority of regular local government levies occurs primarily as a result of the law that limits taxing districts to a 1 percent annual increase in property tax revenues from existing properties. For example, that law has caused the majority of taxing districts to reduce their tax rates below the statutory maximum in order to stay within the 1 percent revenue increase limit. The reduced tax rate allows the taxing districts to replace revenues lost from exemptions by simply increasing the tax rate on the remaining taxable property.
- Since the language of SB 6242 calls for spreading the burden of state acquisition of habitat and recreation land statewide, it is assumed that the term "lost revenues" as used in that bill applies to both the actual reduction in property taxes and the shift of property taxes to other taxpayers in the affected taxing districts.

## 5. Replacement Revenues

- Spreading the burden of local governments "lost revenues" through adjustments in property tax rates in other taxing jurisdictions is not permitted under Washington's Constitution except for that portion of the property tax levied by the state government.
- Therefore, the only feasible way of spreading the burden of the "lost revenues" statewide is for the state to make direct in lieu of tax payments (PILT) to the affected local governments.
- The in lieu payments could be based on one of the following:
  - The combined amount of actual tax loss and tax shifted to other taxpayers
  - The amount of tax that would be paid on the property if were assessed and taxed under the current use tax laws of the state
  - A per acre amount
  - A "net tax lost" amount which would take into account offsetting tax impacts (See the **RMecon Report** in this appendix for a discussion of the various economic impacts and other factors to consider to determine the "net tax impact")
- The state compensation payments for the portion of the tax shifted to other taxpayers could either be used to reduce the taxing districts levy rates to offset the amount of tax shifted or added to the local government's revenues.

- If in lieu of replacement revenues are provided by the state, the mechanism used to compute those amounts for specific land acquisitions should not be so complex and time consuming that the cost of administration is as large as the actual replacement of revenues. In other words, a detailed tax impact study could be more costly than the actual tax impact of the exemption.

## **6. Other Ways of Compensating and/or Assisting Local Governments**

- The state could make direct payments to the local governments for the cost of local government services provided to the state acquired property. This is already being done in many cases (e.g., weed control assessments, fire districts assessments).
- The state could amend the law limiting taxing districts to a 1 percent increase in property tax revenues from existing property
- The state could provide more state funds for equalizing the yields of local revenue sources (e.g., sales and property taxes) in order to reduce wide disparity in per capita revenues that local governments obtain from those taxes.<sup>4</sup>

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<sup>4</sup> After this study was completed, the legislature passed a bill (ESSB 6050), which has been signed into law, that provides equalization payments to cities and counties with low sales tax bases. Except for the equalization program for school district special levies, there is no similar equalization program for taxing districts with low property tax bases.

## Part II. Details of Findings, Conclusions and Recommendations

### 1. Tax Sources and Current Fiscal Conditions of Local Governments

Local governments have no inherent taxing powers under the state's Constitution. They can only levy those taxes authorized by the state legislature. Most local governments are fully utilizing the tax sources at maximum rates authorized by state law.

The two major tax sources for local government are the property tax and various retail sales taxes. Other taxes include:<sup>5</sup>

- Real estate excise tax
- Timber excise tax
- Forest land compensating tax
- Leasehold excise tax
- Public Utility District tax
- Admission tax
- Gambling tax
- B&O and utility taxes (cities only)

In recent years, tax laws have been enacted (primarily as a result of citizens' initiatives) that have reduced and placed new limits on tax revenues available to local governments. Examples of these include:

- **Initiative 695.** The elimination of the motor vehicle excise tax (MVET) resulted in large losses of revenues to numerous local governments. At the time of its repeal, the MVET was producing \$800 million per year for state and local governments. Only a portion of the lost local revenue has been replaced.<sup>6</sup>
- **Initiative 747.** This law limits taxing districts to a 1 percent increase in revenues from their regular property taxes per year, plus the revenue from taxes on new construction.<sup>7</sup> That limitation makes it virtually impossible for most local governments to keep up with the cost of inflation, let alone to meet growing workloads.

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<sup>5</sup> For a comprehensive description of local government tax sources see 2005 Tax Reference Manual, Washington State Department of Revenue.

<sup>6</sup> After I-695 was held to be unconstitutional by the state Supreme Court, the MVET was repealed by the legislature.

<sup>7</sup> The additional revenue from new construction is intended to allow the county and other local governments to provide services to the growing population, which is primarily responsible for the new construction.

Faced with these revenue losses, numerous local governments have been forced to cut back programs and reduce employment levels. Some local governments have been hit particularly hard. The loss of local sales tax equalization funds, for example, reduced one county's general fund revenues by about 50 percent.<sup>8</sup>

## Property Taxes

More than 1700 local governments in Washington rely on property taxes as a major source of tax revenue. It provides 63 percent of all local government tax revenues and 100 percent of the tax revenues of most junior taxing districts. It is the tax source most directly affected by state acquisition of habitat and recreation land.

The state's Constitution limits total state and local regular property taxes to 1.0 percent (i.e., \$10 per \$1000) of the "true and fair value" of the property. From statehood in 1889 to 1944 the Constitution contained no limits on regular property taxes. In 1944 a 2.0 percent regular property limit (i.e., the forty mill limit) was written into the state's Constitution as **Amendment 17**.

The regular property tax limit was reduced to 1.0 percent in 1972 when the voters approved **Amendment 55** to the state's Constitution. Under this constitutional provision, the total regular levies (i.e., without voter approval) of all taxing districts cannot exceed 1 percent or \$10 per \$1000 of true and fair value of the property.

The legislature has authorized each type of taxing district to levy a portion of the overall 1.0 percent or \$10 per \$1000 regular constitutional property tax limit. However, the majority of taxing districts are not able to impose their allowable statutory maximum property tax rates because of the property tax 1 percent revenue increase limit law.

**The 1 Percent Increase Limit Law.** The 1.0 percent property tax revenue limit law was enacted in 2001 when the voters approved Initiative 747. I-747 amended the previous property tax limit law that restricted annual increases in a taxing district's property tax revenue to the percentage increase in the implicit price deflator, plus the revenue attributable to new construction.<sup>9</sup>

The total assessed value of existing property in most districts increases faster than 1 percent a year. *Because of the limit law, most taxing districts are forced to reduce their property tax rates to keep their tax revenues within the allowable 1.0 percent increase, exclusive of revenue from new construction.* In 2004, the combined regular levies of the state and local governments were \$7.92 per \$1000 of true and value. This is equal to 79 percent of the tax rate allowed by the constitution.

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<sup>8</sup> Although Garfield County has been hit hardest by the cessation of the sales tax equalization programs, many other counties with below average sales tax bases have lost revenues.

<sup>9</sup> The first revenue increase limit law, which was enacted in 1971 (Chapter 288), allowed taxing districts to increase their revenues by 6 percent per year, plus revenues from new construction.

The limit law has resulted in reduced property tax rates each year. The average statewide combined rate of all regular and special levies in 2004 was \$12.21. It is the lowest average state-local levy rate since 1986.

The statewide average regular property tax rate of all local governments dropped from \$5.44 per \$1000 in 2000 to \$5.07 in 2004. If the rate of the state's sales tax were lowered by the same percentage (i.e., from 6.5 percent to 6.05 percent), the governor and legislature would be looking at an additional revenue shortfall of more than \$800 million for the 2005-2007 biennium.

One result of the 1 percent increase limit law is that it makes it easy for taxing districts to recover the majority of the revenue lost from property tax exemptions. They do this by increasing the tax rate on other property owners (i.e., shifting the tax loss to others).

**Variation in Property Tax Bases.** The per capita revenues from county property taxes vary considerably from one county to another. **Table 1** contains the per capita assessed value of each of the state's 39 counties. The counties are arrayed in terms of descending order of the per capita valuation. The per capita valuation amounts range from a high of \$303,324 in San Juan County to a low of \$42,047 in Asotin County. The average for the 39 counties is \$74,685. A dollar tax levy in Asotin County produces only 56 percent of the per capita state average. Conversely, a one dollar tax levy in San Juan County produces four times as much in per capita taxes as does the state average.

With the exception of the state's equalizing of special school levies (i.e., providing additional funds to those school districts with low valuations per student), there are no programs for equalizing the yields of property tax revenues for local governments.

### **Sales Taxes**

Sales taxes are the second most important source of local tax revenue. In 2004, the state collected and distributed \$1.1 billion in sales taxes to local governments. Local sales taxes are used primarily by cities and counties although a few special districts (e.g., transportation improvement districts) are also levying the tax. Unlike the property tax, there are no limits on the amount of annual increase in revenues that local governments can derive from sales taxes as long as their tax rates do not exceed the statutory limits.

Although there is not an immediate direct impact on sales tax revenues from state acquisition of private property for habitat and recreational purposes as there is in the case of property taxes, local sales tax revenues, as well as other local revenues, are often generated in future periods from the expenditures made by tourists and others as a result of the use of the habitat and recreation lands.

**Table 1: County Per Capita Property Tax Base in Desending Order**

County	Per Capita County Property Tax Base (Calendar 2004)
San Juan	\$ 303,324
King	\$ 131,285
Jefferson	\$ 108,889
Island	\$ 104,086
Skagit	\$ 88,560
Snohomish	\$ 83,793
Skamania	\$ 79,497
Mason	\$ 78,493
Lincoln	\$ 77,218
Klickitat	\$ 77,069
Pacific	\$ 75,537
Kititas	\$ 74,304
Whatcom	\$ 73,715
Kitsap	\$ 72,691
Chelan	\$ 72,545
Clark	\$ 71,644
Wahkiakum	\$ 70,410
Cowlitz	\$ 70,390
Clallam	\$ 70,315
Thurston	\$ 70,258
Lewis	\$ 69,992
Adams	\$ 67,579
Pierce	\$ 66,359
Columbia	\$ 65,617
Pend Oreille	\$ 60,045
Garfield	\$ 58,144
Grays Harbor	\$ 57,487
Benton	\$ 57,454
Walla Walla	\$ 56,956
Douglas	\$ 55,642
Grant	\$ 54,970
Okanogan	\$ 54,165
Stevens	\$ 54,087
Spokane	\$ 51,269
Ferry	\$ 50,117
Yakima	\$ 46,663
Whitman	\$ 45,156
Franklin	\$ 44,930
Asotin	\$ 42,047

**39 County  
Average  
\$74,685**

Source: Property tax figures from Department of Revenue; population figures from Office of Financial Manag

Compiled by D. Burrows (3/6/05)

**History of Local Sales Taxes.** Beginning in 1970 the legislature authorized cities and counties to impose local sales taxes at a 0.5 percent rate.<sup>10</sup> An opinion from an assistant attorney general at that time advised that under the state's Constitution, the revenue from locally imposed sales taxes could not be distributed to cities and counties on a per capita basis but had to be returned to the local government in which it was collected. The distribution of local sales tax revenues based on where the taxable transaction occurs has resulted in a large disparity in the per capita yields of the sales tax from city to city and county to county.

In enacting the 1970 local sales tax law it was decided that the counties would receive all of the 0.5 percent sales tax collected in the unincorporated area of the county and 15 percent of the tax collected inside the cities. The counties were awarded a share of the sales tax collected within the cities because the counties provide certain governmental services to all county residents, whether they live inside or outside city limits. The cities retain 85 percent of the tax collected within their jurisdictions.

Since 1970 the legislature has provided cities, counties and other special local governments with additional sales tax authority. The maximum general sales tax rate allowed cities and counties is currently 1.0 percent. There is also authorization for several additional local government sales taxes, some of which are credited against the state tax. The revenues from the additional 16 local sales taxes are all earmarked for specific programs.

**Variation in County Sales Tax Bases.** The per capita yield of the local sales taxes varies considerably. In terms of the counties' sales tax base, the per capita amount varies from a high of \$15,620 in San Juan County to a low of \$1,789 in Whitman County. (See **Table 2**)

There are many reasons for variations in the per capita yield of local sales taxes among taxing jurisdiction. Obviously, the amount of retailing activity in the jurisdiction as related to the jurisdiction's population is the most important.

Another important reason for the difference in the per capita sales tax bases of the county governments has do with the amount of retailing activity that takes place outside of city limits. Since the county government receives 100 percent of the tax collected in the unincorporated areas, those counties with large amounts of retailing activities outside the city limits most often have higher sales tax bases than the average county.

**Sales Tax Equalization.** Until a few years ago there was a sales tax equalization program that provided cities and counties with low per capita sales tax revenues with equalization grants. For example, revenues from an earmarked portion of the motor vehicle excise tax were used to bring each county's per capita sales tax revenues to 70 percent of the average for all counties. **(Note: The original city-county sales tax equalization program, which was eliminated following the repeal of the MVET, has been replaced by a new local sales equalization program enacted by the 2005 legislature (ESSB 6050).**

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<sup>10</sup> The first legislative authority for imposing a local sales tax was granted to King County in 1967 for purposes of building the King Dome. That sales tax applied only to the rental of hotel and motel rooms in the County and was allowed as a credit against the state's sales tax.

**Table 2: Per Capita Sales Tax Base of County Government, Descending Order**

County	Retail Sales Base Per Capita County (Calendar 2003)	
San Juan	\$ 15,620	
Kitsap	\$ 6,697	
Jefferson	\$ 6,146	
Clallam	\$ 5,749	
Chelan	\$ 5,345	
Skagit	\$ 5,141	
Douglas	\$ 4,952	<b>Average Percent of 15 Counties Above State Average 37%</b>
Lewis	\$ 4,738	
Mason	\$ 4,709	
Spokane	\$ 4,467	
Island	\$ 4,422	
Kittitas	\$ 4,249	
Clark	\$ 4,239	
Klickitat	\$ 4,013	
Thurston	\$ 3,884	
<b>County Average</b>	<b>\$ 3,856</b>	
Whatcom	\$ 3,798	
Snohomish	\$ 3,726	
Pierce	\$ 3,661	
King	\$ 3,610	
Pacific	\$ 3,558	
Skamania	\$ 3,193	
Franklin	\$ 3,025	
Grant	\$ 2,948	
Cowlitz	\$ 2,871	<b>Average Percent of 24 Counties Below State Average 14%</b>
Walla Walla	\$ 2,795	
Benton	\$ 2,652	
Wahkiakum	\$ 2,647	
Okanogan	\$ 2,598	
Adams	\$ 2,519	
Stevens	\$ 2,453	
Ferry	\$ 2,433	
Grays Harbor	\$ 2,403	
Yakima	\$ 2,362	
Garfield	\$ 2,327	
Pend Oreille	\$ 2,298	
Columbia	\$ 2,269	
Asotin	\$ 2,052	
Lincoln	\$ 2,021	
Whitman	\$ 1,789	

Source: Sales tax figures derived from from Department of Revenue reports; population figures from the Office of Fiscal Management.

Compiled by D. Burrows (3/10/05)

## 2. Counties Fiscal Capacity Compared with Percent of Public Lands

In recent years there has been considerable discussion about the impact of exempt property on the revenues and expenditure requirements of counties and other local governments. In particular, there has been concern that ownership of large amounts of federal and state property in counties tends to restrict the tax resources available to the county and other local governments. Likewise, there is concern about the future impact of private lands being removed from the tax rolls as they are acquired by the state for habitat and recreation purposes.

Federal and state governments and Indian tribes own a large percentage of land in Washington. In ten counties, federal and state lands account for more than 50 percent of the land. This land is constitutionally exempt from property taxes. For the past several years the state has been acquiring additional private property annually for the purpose of protecting plant and wildlife habitat, and for providing additional recreational opportunities to the general public.

The transfer of property from private ownership to public ownership reduces the assessed values of the affected taxing districts by the assessed value of the exempted property. In almost all cases, this annual reduction, which is usually less than 0.1 percent of the taxing district's valuation, is offset by normal increases in the valuation of other property. Nevertheless, concern has been expressed by a number of local government officials regarding the impact that these land acquisitions might have on local economies and local government tax revenues and expenditure requirements. These broader issues are discussed in greater detail in **RMecon Report**.

The impact of state land acquisitions in terms of tax revenue can be both positive and negative, depending, in large part, on the specific use of the property being acquired. So a detailed study of each acquisition would be required to ascertain the net economic and tax impact of the acquisition. The **RMecon Report** examines the various economic and tax factors that need to be considered when estimating the net economic and tax impact of such acquisitions.

The purpose of this analysis is simply to determine how the overall ownership and acquisition of public lands is affecting the two most important local tax sources, the property and sales tax. It seeks to answer the question:

*“Do counties with large amounts of public land ownership tend to have restricted tax bases?”*

As the data in **Table 3** and **Table 4** indicate, counties with large amounts of public land tend not to have restricted tax bases on a per capita basis. As a matter of fact, those counties on average have larger per capita property and sales tax bases than does the

average county. On the other hand, the data show that counties with lower percentages of public lands and habitat and recreation lands have, on average, lower per capita property and sales tax bases.

The method used to answer the question was to compare the percentage of public land ownership to the per capita property and sales tax bases of counties.

A summary of the comparisons of county per capita property and sales tax bases to the percentage of federal and state land ownership and habitat and recreation lands is shown below in **Tables 3** and **4**. Similar comparisons for all 39 counties are shown in **Tables 5** and **6**.

**Table 3: Per Capita County Property Tax Base and Public Land Ownership, 2004 (1)**

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Thirty-nine county average	\$74,685
Counties having 50% or more federal & state land	\$76,583
Counties having less than 10% federal & state land	\$59,636
Counties having 35% or more recreation & habitat land	\$78,420
Counties having less than 5% of recreation & habitat land	\$63,976

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(1) Per capita assessed value figures based on assessed value figures for taxes due in 2004 and population estimates for April 1, 2004.

As shown in **Table 3**, the average per capita assessed value of the counties that have 50 percent or more of their property owned by the federal and state governments actually have a higher per capita property tax base (\$76,583) than the average for all 39 counties (\$74,685). Conversely, the average tax base for counties with less than 10 percent of their land owned by the federal and state governments have a per capita property tax base considerably below the state average (\$59,636). The same conclusion is reached when comparing county property tax bases with the percentage of habitat and recreation land in the county, also shown in **Table 3**.

The per capita tax base comparisons in **Table 3** are based on the averages of counties with high and low percentages of federal and state ownership of property. Not all counties fit the general pattern. For example, federal and state governments own 80 percent of the land in Chelan County, yet the per capita property tax base is below the state average (see

**Table 5).**<sup>11</sup> On the other hand, San Juan County, with only 11 percent of land owned by government, has by far the highest per capita property tax base in the state. San Juan County has numerous summer homes that add value to the county's tax rolls. Because these summer residents are not included in the County's population, it results in an unusually large per capita property valuation.

The per capita county sales tax base figures, as shown in **Tables 4**, also indicate that those counties with the largest percentage of federal and state lands and habitat and recreation lands have, on average, higher per capita sales tax bases. One of the reasons for this is sales taxes paid by tourists.

The average per capita sales tax base for the counties with small amounts of federal and state land ownership is below the state average. There are exceptions from the averages of the two groups, including Skamania with 86 percent federal and state land ownership with a lower than average sales tax base and Spokane, with only 7 percent of federal and state land ownership, having a sales tax base above the average. (See **Table 7**)

**Table 4: Per Capita County Sales Tax Base and Public Land Ownership, 2003 (2)**

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Thirty-nine county average	\$3,856
Counties having 50% or more fed/state land	\$4,224
Counties having less than 10% fed/state land	\$2,718
Counties having 35% or more recreation & habitat land	\$4,438
Counties having less than 5% of recreation & habitat land	\$3,531

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(2) County retail sales tax base includes 100 of taxable sales in the unincorporated area of the county and 15 percent of taxable sales within city limits.

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<sup>11</sup> It should be noted that Chelan County has a very high sales tax base which indicates that the County benefits from high tourist expenditures. One of the reasons that Chelan's property tax base is low is the large amount of land assessed under the current use program.

**Table 5: County by County Comparison of Per Capita Property Tax Base to Federal and State Land**

County	Per Capita County Property Tax Base Calendar 2004	Percentage of Federal and State Land	
Skamania	\$ 79,497	86	
Chelan	\$ 72,545	81	
Jefferson	\$ 108,889	79	
Whatcom	\$ 73,715	67	
Clallam	\$ 70,315	62	
Pend Oreille	\$ 60,045	62	
Kittitas	\$ 74,304	61	<b>Counties with 50% or More \$76,583</b>
Skagit	\$ 88,560	60	
Snohomish	\$ 83,793	59	
Okanogan	\$ 54,165	57	
Pierce	\$ 66,359	42	
Ferry	\$ 50,117	39	
Lewis	\$ 69,992	37	
Mason	\$ 78,493	36	
Grant	\$ 54,970	35	
Benton	\$ 57,454	34	
Columbia	\$ 65,617	33	<b>39 County Average \$74,685</b>
King	\$ 131,285	33	
Yakima	\$ 46,663	33	
Stevens	\$ 54,087	29	
Garfield	\$ 58,144	26	
Asotin	\$ 42,047	24	
Wahkiakum	\$ 70,410	24	
Grays Harbor	\$ 57,487	20	
Thurston	\$ 70,258	20	
Clark	\$ 71,644	19	
Cowlitz	\$ 70,390	17	<b>Counties with Below 10% \$59,636</b>
Pacific	\$ 75,537	17	
Franklin	\$ 44,930	16	
Douglas	\$ 55,642	14	
Klickitat	\$ 77,069	14	
Island	\$ 104,086	13	
Kitsap	\$ 72,691	11	
San Juan	\$ 303,324	11	
Lincoln	\$ 77,218	9	
Adams	\$ 67,579	7	
Spokane	\$ 51,269	7	
Walla Walla	\$ 56,956	6	
Whitman	\$ 45,156	5	

Source: Property valuation figures from the Department of Revenue; population figures from the Office of Fiscal Management; federal and state land figures from Interagency for Outdoor Recreation.

Compiled by D. Burrows (3/4/05)

**Table 6: County by County Comparison of Per Capita Property Tax Bases to Habitat and Recreation Land**

County	Per Capita County Property Tax Base Calendar 2004	Percentage of Habitat and Recreation Land	
Chelan	\$ 72,545	61%	
Skamania	\$ 79,497	60%	
Jefferson	\$ 108,889	60%	
Whatcom	\$ 73,715	59%	
Snohomish	\$ 83,793	45%	
Skagit	\$ 88,560	45%	<b>Counties with 35% or More \$78,420</b>
Clallam	\$ 70,315	44%	
Kittitas	\$ 74,304	37%	
Okanogan	\$ 54,165	35%	
Pierce	\$ 66,359	30%	
King	\$ 131,285	30%	
Columbia	\$ 65,617	26%	
Lewis	\$ 69,992	26%	
Pend Oreille	\$ 60,045	24%	<b>39 County Average \$74,762</b>
Mason	\$ 78,493	24%	
Asotin	\$ 42,047	19%	
Yakima	\$ 46,663	18%	
Garfield	\$ 58,144	17%	
Ferry	\$ 50,117	13%	
Grays Harbor	\$ 57,487	13%	
Grant	\$ 54,970	11%	
San Juan	\$ 303,324	9%	
Benton	\$ 57,454	9%	
Stevens	\$ 54,087	7%	
Clark	\$ 71,644	5%	
Island	\$ 104,086	5%	
Cowlitz	\$ 70,390	5%	
Pacific	\$ 75,537	4%	<b>Counties with 5% or Less \$63,976</b>
Franklin	\$ 44,930	4%	
Spokane	\$ 51,269	4%	
Klickitat	\$ 77,069	3%	
Kitsap	\$ 72,691	3%	
Thurston	\$ 70,258	3%	
Wahkiakum	\$ 70,410	2%	
Adams	\$ 67,579	1%	
Lincoln	\$ 77,218	1%	
Douglas	\$ 55,642	1%	
Walla Walla	\$ 56,956	1%	
Whitman	\$ 45,156	0%	

Source: Property valuation figures from the Department of Revenue; population figures from the Office of Fiscal Management; recreation and habitat figures from Interagency for Outdoor Recreation.

Compiled by D. Burrows (3/4/05)

**Table 7: County by County Comparison of Per Capita Sales Tax Bases to Federal and State Land**

County	Per Capita County Sales Tax Base Calendar 2003	Percentage of Federal and State Land	
Skamania	\$ 3,193	86	
Chelan	\$ 5,345	81	
Jefferson	\$ 6,146	79	
Whatcom	\$ 3,798	67	
Clallam	\$ 5,748	62	
Pend Oreille	\$ 2,298	62	
Kittitas	\$ 4,249	61	<b>Counties with 50% or More \$4,224</b>
Skagit	\$ 5,141	60	
Snohomish	\$ 3,726	59	
Okanogan	\$ 2,598	57	
Pierce	\$ 3,661	42	
Ferry	\$ 2,433	39	
Lewis	\$ 4,738	37	
Mason	\$ 4,709	36	
Grant	\$ 2,948	35	
Benton	\$ 2,652	34	
Columbia	\$ 2,269	33	<b>39 County Average \$3,856</b>
King	\$ 3,610	33	
Yakima	\$ 2,362	33	
Stevens	\$ 2,453	29	
Garfield	\$ 2,327	26	
Asotin	\$ 2,052	24	
Wahkiakum	\$ 2,647	24	
Grays Harbor	\$ 2,403	20	
Thurston	\$ 3,884	20	
Clark	\$ 4,239	19	
Cowlitz	\$ 2,871	17	
Pacific	\$ 3,558	17	
Franklin	\$ 3,025	16	
Douglas	\$ 4,952	14	
Klickitat	\$ 4,013	14	
Island	\$ 4,422	13	
Kitsap	\$ 6,697	11	
San Juan	\$ 15,620	11	
Lincoln	\$ 2,021	9	<b>Counties with Below 10% \$2,718</b>
Adams	\$ 2,519	7	
Spokane	\$ 4,467	7	
Walla Walla	\$ 2,795	6	
Whitman	\$ 1,789	5	

Source: Taxable retail sales figures from the Department of Revenue; population figures from the Office of Fiscal Management; recreation and habitat figures from Interagency for Outdoor Recreation.

Compiled by D. Burrows (3/4/05)

**Table 8: County by County Comparison of Per Capita Sales Tax Bases to Habitat and Recreation Land**

County	Per Capita County Sales Tax Base Calendar 2003	Percentage of Recreation and Habitat Land	
Chelan	\$ 5,345	61	
Jefferson	\$ 6,146	60	
Skamania	\$ 3,193	60	
Skagit	\$ 5,141	45	
Snohomish	\$ 3,726	45	
Whatcom	\$ 3,798	45	<b>Counties with 35% or More \$4,438</b>
Clallam	\$ 5,748	44	
Kititas	\$ 4,249	37	
Okanogan	\$ 2,598	35	
King	\$ 3,610	30	
Pierce	\$ 3,661	30	
Columbia	\$ 2,269	26	
Lewis	\$ 4,738	26	
Mason	\$ 4,709	24	
Pend Oreille	\$ 2,298	24	<b>39 County Average \$3,856</b>
Asotin	\$ 2,052	19	
Yakima	\$ 2,362	18	
Garfield	\$ 2,327	17	
Ferry	\$ 2,433	13	
Grays Harbor	\$ 2,403	13	
Grant	\$ 2,948	11	
Benton	\$ 2,652	9	
San Juan	\$ 15,620	9	
Stevens	\$ 2,453	7	
Clark	\$ 4,239	5	
Cowlitz	\$ 2,871	5	
Island	\$ 4,422	6	
Franklin	\$ 3,025	4	<b>Counties with Below 5 Percent \$3,531</b>
Pacific	\$ 3,558	4	
Spokane	\$ 4,467	4	
Kitsap	\$ 6,697	3	
Klickitat	\$ 4,013	3	
Thurston	\$ 3,884	3	
Wahkiakum	\$ 2,647	2	
Adams	\$ 2,519	1	
Douglas	\$ 4,952	1	
Lincoln	\$ 2,021	1	
Walla Walla	\$ 2,795	1	
Whitman	\$ 1,789	0	

Source: Taxable retail sales figures from the Department of Revenue; population figures from the Office of Fiscal Management; recreation and habitat figures from Interagency for Outdoor Recreation.

Compiled by D. Burrows (3/4/05)

### 3. Policies on Replacing Revenues from Property Tax Exemptions

The state's original 1889 Constitution, as interpreted by the State Supreme Court, provided for the exemption of government property from property taxes and allowed the legislature to exempt "quasi-public property." However, when the voters approved **Amendment 14** to the state's Constitution in 1930, the legislature was given authority to exempt private property from taxation.<sup>12</sup>

From statehood, most public property has been exempt, including federal, state, county, city and the property of other municipal corporations. In later years as new types of taxing districts were created, the legislature added those properties to the list of exemptions.

State policies for compensating local governments for loss of revenue due to tax exemptions have varied over the years. There are several programs where state payments are made to local governments for various state exempt lands.<sup>13</sup>

The legislature has rarely provided compensation to local governments as a result of private property tax exemptions. One example of such state payments was in 1984 when inventories became exempt from property taxes. At that time the compensating payments were made to those taxing districts that were most severely impacted by the exemption.<sup>14</sup>

#### State Payments on State Habitat and Recreation Land

Presently, there are a variety of ways that local governments obtain offsetting revenues from the state's acquisition and ownership of habitat and recreation properties. Listed below are examples of revenues going to local governments from these lands:

- The Department of Fish & Wildlife, the Department of Natural Resources and State Parks all pay benefit assessments to local taxing districts for such costs as weed protection and fire protection. For example, in 2004 the Department of Fish & Wildlife paid \$212,014.
- All three agencies pay applicable Local Improvement District assessments.
- The Department of Fish & Wildlife makes payments in lieu of taxes to local governments for habitat and game lands. These payments amounted to \$429,060 in 2004. Counties have a choice between receiving the in lieu payments from Fish &

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<sup>12</sup> The one exception to the granting of private property exemptions prior to 1930 occurred in 1900 when the Constitution was amended to allow the legislature to exempt \$300 of the personal property of each homeowner.

<sup>13</sup> For a comprehensive description of various in lieu and other payments made on federal and state lands see "*Overview of Payment Programs Related to Federal and state Public Lands in Washington*" by Carole Richmond, Office of the Interagency Committee for Outdoor Recreation.

<sup>14</sup> The legislature appropriated \$14 million for this program. (Chapter 62, Laws of 1983, 1<sup>st</sup> Ex. Session)

Wildlife on game lands or they may instead be given the revenues from enforcement fines and reimbursements for their costs of enforcing the game laws.

- The 2005 legislature pass legislation (ESSB 5396) providing for the Department of Natural Resources to make payments in lieu of taxes (PILT) to local taxing districts on its habitat and recreation properties. The in lieu payments are to be based on the amount of taxes that would be paid on the property as if it were taxed under the current use assessment laws. The bill's fiscal note indicated that the in lieu payments would be some \$147,000 per year.
- Leasehold excise tax (LET) payments are made on certain leasehold interests on public property by all three agencies. The state LET tax rate is 12.84 percent. Counties and cities are permitted to impose a local LET which is credited against the state tax. The local tax rate is a maximum of 6 percent. Counties retain all of the revenue collected outside city limits and one-third of the revenue collected inside cities. State Parks remitted \$250,000 in LET payments in 2004.
- The real estate excise tax and the forest land compensating tax (when applicable) are paid to counties (and cities if applicable) by the state at the time that private land is acquired by the state and taken off the tax rolls.

Local governments receive other taxes from state acquired property. For example, camping and other charges made by State Parks are subject to both state and local sales taxes. A total of \$1.6 million in sales taxes were collected by the Parks Department and distributed to state and local governments in 2004.

#### **4. Direct Impact on Property Taxes of State Acquisition of Habitat and Recreation Lands**

The direct impact on property taxes of the state acquiring habitat and recreational land from private property owners is to reduce the assessed values of the affected taxing districts by the valuation of the exempt property. As noted previously, this reduction is generally only a fraction of one percent and the revenue loss is usually, but not always, offset by increases in the taxes of other properties in the taxing district.

##### **Tax Loss versus Tax Shift**

Whether there is an actual loss of tax revenue or a shift of the tax previously paid on the exempt property depends primarily on four conditions:

- (1) Whether it is a special or regular property tax levy
- (2) The percentage that the exempt property's assessed value is of the taxing district's total assessed value
- (3) Whether the taxing district is at its maximum statutory levy rate, and
- (4) If the district is at its statutory maximum, the amount of the annual increase in the taxing district's assessed value (exclusive of new construction).

**Special versus Regular Levy.** Special levies are those approved by the voters. Special levies are outside the constitutional 1 percent limit. They are intended to produce a specific amount of money. They are used for current M&O expenses, primarily by school districts, and for capital improvements being made by numerous local governments. Taking taxable property off the tax rolls results in a shift in that portion of the special levy that came from the exempt property to the remaining taxable properties.

In its property tax exemption impact model, the Department of Revenue assumes that all special levy revenue losses from exemptions are recaptured by the tax being shifted to other taxpayers in the affected taxing district.

**Valuation of Exemption Compared to Taxing District's Valuation.** The percentage relationship between the value of the property being exempted and the assessed value of the taxing district is an important factor in the relative size of the tax impact and whether or not there is an actual loss of revenue or a shift of taxes to other taxpayers. The larger the taxing districts, in terms of assessed value, the less chance the taxing district will experience a tax loss.

**Taxing Districts below Statutory Maximum Rate.** If the previous year's tax rate of the taxing district was below its statutory maximum (e.g., held down because of the 1 percent increase limit law), the taxing district can replace the revenue lost from the exemption by increasing the tax rate on the remaining taxable property.

**Increase in Taxing District's Assessed Value.** In cases where taxing districts are at their statutory maximum rate and they lose assessed value from property tax exemptions, they will often experience an actual loss of tax revenue. However, if the taxing district has an increase in its assessed value (exclusive of new construction) during the year the exempt property is taken off the tax roll, it will likely be able to shift the loss from the exemption to other taxpayers.

According to the Department of Revenue, about 20 percent of the taxing districts are at or near their statutory maximum. These taxing districts are more likely to suffer an actual revenue loss from property tax exemptions. The tax rates of the other 80 percent of the taxing districts are significantly below their statutory maximum, and the impact of lost revenues from exemptions can be shifted to the remaining taxpayers in the taxing district.

Counties that experience slow growth or no growth in property valuation would have a higher percentage of tax districts at their statutory maximums. This means that a higher percentage of the revenues lost from tax exemptions would result in an actual tax loss for the taxing districts in those counties.

Because some counties in Eastern Washington are experiencing little or no growth in assessed value, the taxing districts in those counties would have a higher percentage of tax losses to tax shifts than the 20 percent to 80 percent state averages.

### **Direct Impact of \$1 million State Property Acquisition**

**Table 9** indicates the direct impact on property tax revenues from the state's acquisition of \$1 million of habitat or recreation lands in a typical mid-sized county. The table shows the dollar and percentage impact of the \$1 million exemption for each of the taxing districts in the affected area. The direct state and local property tax impact is \$11,700. The impact is shared by eight local taxing districts and the state. The total local government impact is \$8,700. The majority of the \$8,700 or \$7,620 is shifted to other taxpayers in the county. The entire \$3000 state tax amount is shifted to taxpayers statewide.

The shifted portion of the tax would have a minimal impact on the other taxpayers in the affected districts. In the example shown in **Table 9**, it would add about \$1.20 to the total property tax (i.e., from \$2,340 to \$2,341.20) of a property valued at \$200,000.

### **Statewide Impact of Property Acquisition by the State**

On the basis of an assumed \$30 million in state acquisition of property per year under the Washington Wildlife and Recreation Program, the total property tax previously paid on this land prior to state acquisition was approximately \$351,000.<sup>15</sup> The figures in **Table 10**

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<sup>15</sup> This assumes that the assessed value of the property is approximately the same as amount paid to acquire it.

provide an estimate of how much of the \$351,000 would be actually lost to the taxing districts and how much would be shifted to the other taxpayers in the taxing districts.

**Table 9: Direct Impact on Property Taxes of \$1 Million Habitat or Recreation Land Acquisition (1)**

Taxing District	2004 Levies	Tax Rate Per \$1000	Impact of \$1 Million Exemption	Exemption as Percent of Total levies	Reduced Revenue(2)	Shifted Revenue(2)
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**Regular Local Levies**

County	\$ 7,700,000	\$ 1.50	\$ 1,500	0.02%		
County Road	\$ 4,700,000	\$ 1.50	\$ 1,500	0.03%		
Fire	\$ 1,140,000	\$ 1.10	\$ 1,100	0.10%		
Library	\$ 2,400,000	\$ 0.50	\$ 500	0.02%		
EMS/Hospital	\$ 500,000	\$ 0.40	\$ 400	0.08%		
Port	\$ 1,900,000	\$ 0.30	\$ 300	0.02%		
Cemetery	\$ 500,000	\$ 0.10	\$ 100	0.02%		
<b>Subtotal</b>	<b>\$ 18,840,000</b>	<b>\$ 5.40</b>	<b>\$ 5,400</b>		<b>\$ 1,080</b>	<b>\$ 4,320</b>

**Local Special Levies**

Schools	\$ 2,380,000	\$ 3.00	\$ 3,000	0.13%		\$ 3,000
Fire	\$ 300,000	\$ 0.30	\$ 300	0.10%		\$ 300
<b>Subtotal</b>	<b>\$ 2,680,000</b>	<b>\$ 3.30</b>	<b>\$ 3,300</b>	<b>0.12%</b>		<b>\$ 3,300</b>

**State School Levy**

<b>State Total(3)</b>	<b>\$ 1,527,000,000</b>	<b>\$ 3.00</b>	<b>\$ 3,000</b>	<b>0.00%</b>		<b>\$ 3,000</b>
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**Summary of Impact**

<b>Total tax impact of of \$1 million exemption</b>	<b>\$ 11,700</b>
<b>Range of percentage impact on local tax revenues</b>	<b>0.02% to 0.13%</b>
<b>Amount of lost revenues</b>	<b>\$ 1,080</b>
<b>Amount of tax shifted to other taxpayers (4)</b>	<b>\$ 10,620</b>

(1) Tax levies and rates based on a typical Washington mid-sized county

(2) The revenue lost versus revenue shifted will vary by taxing district according to the conditions described in the text. The percentages used to estimate the breakdown for all local regular levies were based on Department of Revenue data.

(3) The impact on the state levy is shared by all taxpayers in the state.

(4) \$3000 of the \$7920 is shifted statewide.

D. Burrows, March 2005

**Table 10: Statewide Direct Property Tax Impact of \$30 million in  
Habitat and Recreation Land Acquisition per Year**

	Tax Amount	Amounted Shifted	Revenue Loss
Total local government regular levies (1)	\$146,000	\$117,000	\$29,000
Total state levy	82,000	82,000	0
Total local government special levies	<u>123,000</u>	<u>123,000</u>	<u>0</u>
<b>Totals</b>	<b>\$351,000</b>	<b>\$322,000</b>	<b>\$29,000</b>

(1) Estimated breakdown between tax lost and tax shifted based on the Department of Revenue's 80 percent/ 20 percent estimates.

The above figures were based on the actual breakdown of total state and local property taxes for 2004. The statewide figures indicate that about 8.3 percent of the lost tax exemption revenues actually resulted in a reduction in taxing district revenues and that the remaining 91.7 percent was shifted to other taxpayers in the district.

**Table 10** indicates that local taxpayers are subsidizing the annual acquisition of habitat and recreation land by paying some \$240,000 in additional property taxes. The affected local governments are losing \$29,000 per year in property taxes. These figures are based on an estimate of \$30 million in annual statewide acquisitions of habitat and recreation land and average statewide property tax levies.

Because the above figures are based on state averages, the impact on any one taxing district will be different. It would require an examination of each parcel of property purchased by the state along with a comparison of the tax levies of all the affected local governments before and after the acquisition to determine the exact split between tax shifted and revenue lost of the taxing districts.

## 5. Exemption Replacement Revenues

The acquisition of state property reduces the assessed value of only those taxing districts that are making levies in the geographical area in which the exempt property is located. As explained above, the impact of the exemption is either an actual loss of tax revenues and/or a shifting of the lost revenues from the exemption to other taxpayers.

**Substitute Senate Bill 6242** passed during the 2004 legislative session called for a study of *“alternative ways to compensate local governments by spreading statewide the impact of lost tax revenue.”* As noted before, it is assumed that the term “lost revenue” applies to both the actual reduction in property taxes as well as that portion of the taxes that is shifted to other taxpayers in the affected taxing districts.

One of the reasons given by proponents of sharing the impact of state land acquisitions statewide is that the benefits of the habitat and recreation land most often extend beyond the county in which the property is located. That is, all of the Washington’s citizens are said to benefit by the protection of the state’s natural areas, native wildlife and the creation of parks and other recreation areas. For that reason, proponents of spreading the “lost taxes” statewide believe that the affected taxing districts should not have to shoulder the entire impact of reduced and shifted property taxes.

**Statewide Property Shift Not Possible.** Under Washington’s Constitution, as interpreted by the state Supreme Court, it is not possible to shift the property tax burden from one taxing district to another.

Only in the case of the state’s property tax levy, imposed uniformly statewide, is the impact of exemptions shared equally by all property taxpayers in the state.

**Direct Payments.** The legislature could earmark a portion of the state property tax levy and use the funds to provide compensating payments to local governments. Or, it could simply make those payments from the state’s general fund. The in payments in lieu of taxes (PILT) could be based on:

- The total amount of the tax loss and tax shifted to other taxpayers at the time of state acquisition
- The amount of tax that would be paid on the property if were assessed and taxed under the current use tax laws of the state
- A flat dollar amount per acre
- The “net loss” in tax revenues which would include the impact of indirect affects on the tax revenues and the costs to the taxing district of providing services to the public land (See **RMecon Report** for a discussion of how the net economic and tax impact of public land ownership on local communities could be determined)

- The amount of the state compensation for the portion of the tax shifted to other taxpayers could either be used to reduce the taxing districts levy rates to offset the amount of tax shifted or added to the local government's revenues

## 6. Other Ways of Compensating Local Governments

The direct impact on the property tax revenues of local governments from the state ownership of state habitat and recreation lands is the amount of property tax that would be paid if the land were not in exempt status. However, there will likely be additional impacts on local tax revenues, both negative and positive. This will depend in large part on the specific use of the property. The **RMecon Report** includes an examination of the factors that determine those impacts.

In addition to the direct in lieu payments there are several ways that the state could provide assistance to the local governments if the state determines that compensation is appropriate.

- The state could make payments to the local governments for the cost of both direct and indirect local government services resulting from state's habitat and recreation land in the taxing district (i.e., county, junior taxing districts). This is already being done in many cases (e.g., weed control assessments, fire districts assessments).
- Provide local government with additional taxing authority. The major tax source available to taxing districts most impacted by state land acquisition is the property tax. The present 1 percent limit severely restricts the revenue that these governments can obtain from their property tax levies.
- Amend the 1 percent property tax limit law so it takes into account the varying needs of local governments.
- Provide more state funds for equalizing the yields of local revenue sources (e.g., local property and sales taxes). The 2005 legislature enacted a new local sales tax equalization program (ESSB 6050). There is no equalization program for local property taxes except in the case of special school levies.

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**Economic Impacts of Tax-Exempt Habitat and Recreation Lands on  
Local Economies and Governments in Washington State**

**Final Draft**

**May 20, 2005**

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Opinions provided in this report are those of the author only and do not represent the opinions of the Interagency Committee for Outdoor Recreation or the State of Washington

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## **Introduction**

Second Substitute Senate Bill 6242 (SSB 6242) requires the IAC to “examine alternative ways to compensate local governments by spreading statewide the impact of lost tax revenues from acquisitions of property for habitat and recreation.” [§1(2)(b)(iii)] This report responds to a set of questions about impacts, examines the types and extent of economic impacts that might occur, and describes a testing-level methodology (TLM) designed to calculate some of the impacts associated with a public land acquisition. The TLM is currently not intended nor able to accurately estimate all impacts. Rather, it helps identify economic effects that are likely to be important and therefore may deserve further research or development, and it helps to identify data gaps that need to be remedied in order to obtain useful estimates.

## 1. Findings

### 1.0 General Findings

General conclusions about the major issues to be addressed by this report are reported below. Documentation is provided in the sections that follow.

1. The initial reduction in property tax revenues caused by a large public land acquisition or a number of acquisitions can be significant for small, local economies and tax jurisdictions.
2. Public land acquisition and management can have implications for local economies and government finances that are large enough, relative to the initial reduction in property tax revenues, to deserve consideration.
3. Some of these effects are beneficial for local governments. In some cases, public property acquisition and management could increase sales taxes and other property taxes and reduce government costs by significant amounts relative to the initial reduction in property tax revenues.
4. State parks and recreation areas can benefit local economies by increasing spending and sales-type taxes, but these effects need to be evaluated on a site-specific basis. Amount of visitation, visitor characteristics, type of activities offered, and spending opportunities in the region should be considered.
5. The most substantial effects of a public land acquisition are likely to occur if, without the acquisition, the property would be developed for residential, commercial or industrial use, and with the acquisition, this development does not locate elsewhere within the local taxing jurisdiction. This situation probably accounts for a small share of all possible acquisitions, but because of the potential magnitude of effects, should not be disregarded.
6. While some types of economic effects can be easily estimated and the results accepted with a reasonable level of confidence, other effects are less certain. However, for some effects, the current basis of information is considered to be adequate for scoping the effects in terms of their potential magnitude relative to the initial reduction in property tax revenues.

The effects with some useful information available are:

- Levy rate increases
- Proximate effects (the effect of the acquired property on nearby residential properties)
- Effects of some economic activities on local spending and tax revenues
- Costs of local government

The effects for which the secondary information base is not useful for judging even a relative magnitude are:

- Amenity effects

- Property market effects

For some effects that might influence local government finances in a particular acquisition, the critical information is not available. Some effects need to be dealt with at a site-specific level, and primary research would be required to assess them. In particular, the amount of economic activity generated by recreational land use and the share of that activity that finds its way into the local economy is highly variable and inherently site-specific in nature.

### 1.1 Response to Questions

Some of the findings of this analysis are provided below in terms of answers to specific questions.

#### **1. Lost property tax revenues to local governments can be quantified. Is this adequate to determine the impacts of public land ownership on local government?**

Generally, no. There are a number of other types of effects, both positive and negative, on local governments that can be significant or substantial compared to the initial reduction in property tax revenues. For any acquisition, some of these impacts are likely to be not important, but others are likely to be worth considering.

#### **2. If the answer to number 1 is no, what other factors must be taken into account?**

Seven other factors have been identified. The other factors are:

1. **Levy rates.** The ability of local tax jurisdictions to increase their tax levy rates;
2. **Proposed use.** With acquisition, the proposed type of land use and associated types and levels of economic activity such as recreation;
3. **Expected future development.** Without acquisition, the expected future land use and types and levels of economic activity;
4. **Relocation effect.** With acquisition, the possibility that the expected future development will locate elsewhere within the local area;
5. **Other property values.** The effect of the acquisition on other property values in the region;
6. **Government costs.** The effect of the acquisition on local government costs; and
7. **Existing programs.** Existing programs that may compensate local governments for lost tax revenues or increased costs.

This report intends to provide assistance to 1) help determine when these factors will be important, and 2) provide scoping-level analysis of how they might be calculated.

#### **3. If there is not a single answer to whether public land ownership has a positive or negative economic impact on local government, then what factors should be taken into consideration when assessing the impacts of a particular acquisition?**

The relative importance of factors 1 to 7 will vary substantially among acquisitions. For any one acquisition or group of acquisitions, the questions to ask about that acquisition are provided below.

To determine if local taxing districts will be able to raise their levy rate:

1. Is each junior district levy below its statutory maximum, and is the total of regular levies also below the maximum regular rate?
2. If yes, are taxing districts otherwise unwilling or unable to raise levy rates?

To determine any change in local economic activity and related taxes:

3. What is the current use and level of economic activity on the land(s)?
4. Is there an expected future development that is different from current use? What is the expected use and level of economic activity on the land(s) for the expected future development?
5. If there is an expected future development, will there be other land available in the local area or county that is at least as suitable for the expected future development?
6. If not, is there a reason for the expected future development to locate in the local area or county that is sufficient to overcome the lack of suitable land?
7. What is the proposed use and level of economic activity on the land(s) after it is acquired?
8. If the proposed use includes recreation, what types of activities will be offered? How much visitation will be created? How much additional spending within the local area will result, and what changes in related local government revenues will occur?

To determine if other property values and related taxes may be affected:

9. Is there or will there be residential development adjacent to or near the acquired land(s)? Will the acquired land(s) provide a significant change in amenities or disamenities for residential properties located adjacent to or near the land?
10. Will the acquisition(s) cause a significant increase in environmental amenities or disamenities for other people or properties in the local area?
11. If the answer to 5. Or 6. Is yes, is the reduction in property supply a significant share of that type of property available for use or development in the local property market?
12. Would the economic activity on the expected future development or the proposed use have a significant effect on property values?

To determine if local government costs might be affected:

13. Would the economic activity on the expected future development or the proposed use have a significant affect on local government costs relative to current use?

What are the net changes in costs? Are there programs or policies in place to pay for these costs?

**4. What methods could be used to calculate the impacts of a particular public acquisition, using the factors identified in 3.**

The direct impact of a public acquisition on property tax revenues is a straight-forward calculation and can be accomplished with publicly available information. This analysis includes an effort to develop a testing-level methodology (TLM) to estimate impacts of public land acquisition on local government finances. This effort reveals that calculating impacts associated with the seven factors above would generally not be simple or straight forward. Usually, there is not good secondary quantitative information that can be used for calculations. However, the TLM includes the thirteen questions above to determine if any of the seven factors need to be considered. If so, then site-specific analysis would generally be advisable.

Questions 5, 6 and 7 deal with local economic impacts as distinguished from local government finances.

**5. Are some types of public land more likely to negatively impact the local economy than others? For example, does a nature preserve have different impacts than a state park?**

As a judgment regarding what is “more likely” the answer is yes, but it depends on whether the local economy is rural or developed. The evidence suggests that a nature preserve is likely to have less of a negative effect in a developed area, and a state park is likely to have less of a negative effect in a rural area. This result must be qualified because site-specific characteristics could trigger a different result. Regarding the second part of this question; yes, a nature preserve has different impacts than a state park.

Many studies show that open space lands can result in significant appreciation of nearby residential properties. This effect is called the proximate principle. A nature preserve in a developed location typically benefits residents by passive use values (aesthetics) and environmental amenities, and these benefits are reflected in higher property values. The available studies suggest that the appreciation provided by open space can be more than provided by recreation lands, especially when the recreation use results in crowding, trespass, or nuisance situations (Crompton, 2004, p. 3).

A nature preserve in a rural area far removed from any residential property is unlikely to have much positive effect on property values. The incremental benefit of open space in a rural area is likely to be small, and there may be relatively few people living in the vicinity of the acquired property. Nature preserves located near agricultural lands can be detrimental to nearby property values if they harbor wildlife such as deer and birds that can damage crops (Lynch and Brown, 2000).

On the other hand, a state park located in a rural area is likely to provide relatively more benefit for the local area than one located in an urban area. The analysis below argues that the benefit of recreation development for local economies depends substantially on increased spending by non-local persons. A state park in a remote location typically benefits local economies more simply because a larger share of visitors are non-locals. Also, their spending is likely to be a much larger share of the local economy than in an urban area.

There are some conditions under which the opposite could be true; i.e., that a state park would be no better for a rural economy than a nature preserve. The state park can benefit the rural economy only if there are goods and services available to buy. If local retail and services are not located between visitors and their destination, then the visitors may do their shopping elsewhere. A state park might provide camping where visitors formerly used local accommodations. This would be a negative effect for the local economy. On the other hand, a nature preserve that provides tours might attract out-of-region visitors who must stay in local accommodations; precisely the type of visitation that provides the most local benefit.

In developed areas, a state park may have less of a spending effect because most visitors are from the local area, and they would have spent their money in the local area anyway, and the spending of non-local visitors is a relatively small share of the local economy. The state park in a developed area is more likely to result in negative externalities for residents; congestion, trespass, and noise being examples.

On the other hand, there are more spending opportunities in the developed economy. A state park provide the most benefit and positive effect for a local economy when the types of activity provided are associated with more expenditure, the park attracts non-locals who spend freely, and when the park keeps locals and their money in the local area.

Generally, the types of impacts from a state park are different from a nature preserve. Nature preserves benefits residential property owners most, while state parks benefit the owners of certain retail and services businesses most. Typically, for any acquisition, some people in the local area will gain while others lose.

For a local government, the types of effects that may offset the initial property tax reduction are different. Nature preserves generally increase local residential property values and property taxes, while state parks increase sales and use taxes associated with recreational expenditure and linked industries. The proximate effect provides an offsetting effect for property tax revenues, but recreation spending changes the distribution of local government revenues.

**6. Is it possible that public land ownership in counties that already have large portions of public land will always result in a negative economic impact? In other words, could there be a threshold (i.e. percentage of public land ownership) that, once crossed, is always bad for the local economy?**

No. “Will always” seems very unlikely, and it is unlikely that there could be a “threshold” which, once crossed, is “always bad.” The impacts on local economies depend on how the land is used, not who owns it.

In general, areas with large public land ownership shares are rural areas, and rural areas may fare worse from additional public land acquisition than developed areas. The additional acquisition may not provide additional environmental or recreational amenities that benefit local residents. In small local tax jurisdictions, an acquisition may represent a relatively large share of the total land base available for development or established economic activities. However, there is no reason to believe that, at the county level, impacts of additional acquisitions must be negative.

### **7. What factors should be taken into account when assessing the potential economic impacts of a public land acquisition?**

The types of factors that should be taken into account in estimating economic impacts are some of the same factors that are important to local government finances. This is to be expected because the local economic impact is the cause of the local government financial impact. The relevant factors are repeated here.

1. **Expected Future Development.** Without acquisition, the expected future land use and associated types and levels of economic activities;
2. **Relocation Effect.** With acquisition, the probability that the expected future land use without acquisition will locate elsewhere in the local area;
3. **Proposed Use.** With acquisition, the proposed type of land use and associated levels of economic activities;
4. **Other Property Values.** The effect of the acquisition on other property values in the region

### **8. Can models and protocols be developed for determining the impacts of public land acquisition that could be used as a tool for determining when compensation to a local government is appropriate?**

It is difficult and usually infeasible to calculate impacts of a land acquisition using available data. However, it would be more feasible to use models and protocols, because the protocols could direct a user to ignore some types of impacts when they are likely to be small, and they could guide users to additional models or research required to improve the information.

## 2. Definition of Effects and Measures

This section defines the types of economic effects included in the analysis and the potential measures proposed for that economic effect. The measures are just potential in that the ability to calculate them has not yet been considered. Economic effects are organized according to the type of cause-and-effect relationship that generates them.

### 2.0 Definition of Terms

As a matter of standard analysis procedure, “effects” are described by reference to the difference between two future conditions; one **with acquisition** and one **without acquisition**. An effect on the local economy means that an economic measure will differ between the with-acquisition future and the without-acquisition future. The future over which the two scenarios are compared is called the **time horizon**. Therefore, the analysis is inherently a forecast, and all forecasting comes with inherent difficulties. The general question used to determine effects is, what will happen on this land with the acquisition, and what will happen without it?

There is one exception to this standard for this report. Some analysis is concerned with the cumulative effects of proposed acquisitions and existing public land ownership. Any analysis that includes these cumulative effects is clearly defined as such.

This analysis defines **current use** as the type of use and level of use expected for the immediate future without acquisition, and **expected future development** is defined as the expected time and type of development and economic activity without acquisition in the long run.

If, without the acquisition, the land would be developed for residential, commercial or industrial use, or for public infrastructure, then the without-acquisition future includes current use and expected future development. Developed lands have much different and larger impacts on economic activity and government revenues and costs than undeveloped, agricultural or timber lands. For most acquisitions, there will be no expected future development to be concerned about. The land to be acquired may not be suitable for any developed use other than current use, or there may be no plans to develop it anytime in the foreseeable future.

**Proposed use** is the types and level of uses with acquisition. For our purposes, proposed use is likely to be preservation and/or recreation. If the economic activity on the proposed use will be much different from the without-acquisition future, then some effort to clarify activity types, levels of use, and related economic activity is justified.

There are many measures of economic effects that could be used. Economists differentiate economic **impacts** from **benefits and costs**. Economic impacts include any observable and measurable features of the economy of interest. Employment, value of output or sales, wages and salaries, expenditure, and personal income are all examples.

Some of the measures used in economic impact analysis are used in the calculation of benefits and costs, but they are not generally equivalent to benefits or costs. Benefits and costs are the willingness to pay of a specified group of people for a specific increment of a good, a service or a change. Since all benefits and costs measure the same thing, they can be added together and compared. Economic impact measures include a variety of things that cannot generally be combined or compared. This analysis includes some economic impact measures and some cost and benefit measures.

This analysis has a **local perspective**. It is focused on local areas; counties, cities and local taxing jurisdictions, and the people who live, work and own property there. The primary focus is on revenues and costs of local governments and local economic impacts measured as personal income and employment. Some information on benefits and costs of local area residents is developed. In particular, certain benefits to residential property owners are capitalized into property values, and changes in property tax costs are considered.

The analysis does not count benefits to residents of the State beyond the local region, or to the nation. The analysis is not intended as an economic analysis which would decide whether or not the State should purchase the land. Such an analysis would require that benefits and costs be counted from the State perspective. State benefits would include the net value that all State residents obtain from recreation and preservation, and costs would include the net value of economic activity lost to the State because preservation or recreation precludes other uses. These considerations are not part of this analysis.

## 2.1 Relocation Effects

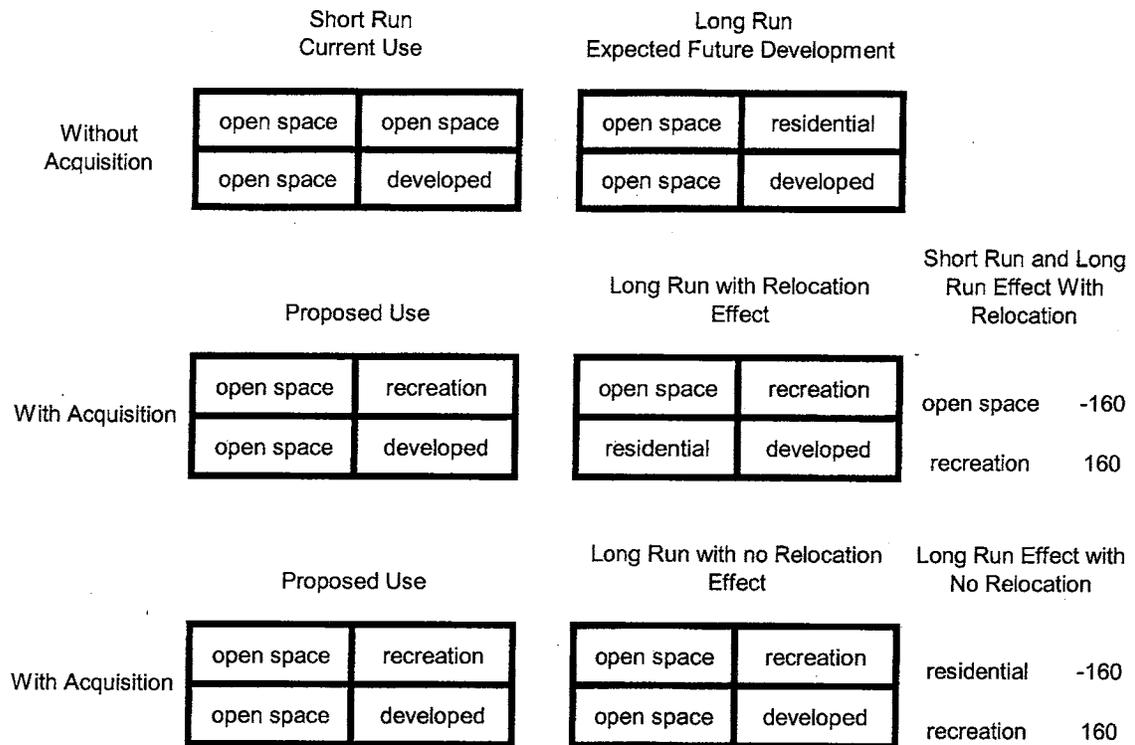
Relocation effects are important in determining what effects to compare, and consideration of relocation effects can simplify an analysis. A **relocation effect** means that the expected future development displaced by the acquisition will relocate within the local tax area. If relocation occurs, then the expected future development does not need to be evaluated because it occurs in the region with or without the acquisition. However, there is then an effect in terms of land remaining available for development and there may be property market effects.

On the other hand, if the expected future development is displaced from the local area by the acquisition, then the effects of not having the expected future development must be counted. However, if the development is displaced outside of local property markets, then there is no property market effect because the amount of land remaining available for development is not affected by the acquisition. These principles are displayed in Figure 1.

If no future development is expected, then the relocation effect is also not important, and the without-acquisition land use will probably be the same as the current use.

**Figure 1. Graphic Example of Relocation Effect.**

Each block represents alternative uses for 640 acres of land



### 3. Types of Effects and Potential Measures

The following sections define the types of economic effects and measures that an analysis of local economic effects of public property acquisition may want to consider.

#### 3.1 Initial Acquisition and Property Tax Reduction

Under Washington law, state, federal, and local government and tribal lands are exempt from property taxes. When a property passes from private to public ownership, it is removed from the tax rolls. The initial reduction in local property tax revenues is equal to the taxes paid on the property based on its assessed or current use value. The initial tax revenue reduction is allocated pro-rata among all of the taxing districts in the tax code area, including the State levy.

As an economic matter, it is useful to determine if the initial reduction in tax revenue represents an economic cost to the local area. A property tax represents a revenue for local government but a cost to someone else. So, if we eliminate the tax, is the net effect zero?

Before the acquisition, the property tax that must be paid should be reflected in the property value; it is capitalized into a lower market price. The existing property price will be lower in comparison to what it would be without the property tax. The buyer, if it is a public entity, benefits from the lower property value that exists because the seller must pay property tax, but the public entity then does not have to pay the property tax. Therefore, the benefit of the reduced property tax is probably captured by the public buyer. If this buyer is not a local interest, then the initial net tax effect of the property acquisition is also a net cost from the local economic perspective.

How large is this net cost from the perspective of a local region? One way to measure this would be by the size of the revenue reduction relative to all revenues. Washington has about 2,340 tax jurisdictions of varying size (WDR, 2004). In 2004, these jurisdictions had an average assessed value of \$2.96 billion dollars, and the median was \$316 million. For large taxing districts, as measured by their assessed value, the effect of removing one or a few undeveloped properties from the tax rolls would probably not be great. However, about 20 percent of taxing districts had an assessed value of \$50 million or less, and 10 percent had an assessed value of \$21 million or less. For these districts, the loss of one large parcel or a few parcels from the tax rolls could be significant.

Information on tax rates by tax area and the assessed or current use value of the property are all public information. With this information, the initial reduction can be easily calculated. The availability of local tax information varies from county to county. Most (some?) counties have services available on the internet where data for any parcel can be located. For other counties, a trip to the county assessor's office may be required.

Potential measures: property tax revenues

### 3.2 Effects of Levy Rate Increases

A somewhat more difficult question involves the ability of local districts to maintain revenue by increasing property levy tax rates. Local taxing districts may be able to increase the levy on all remaining properties to maintain revenue, but each junior district levy must remain below their statutory maximum, and the total of regular levies must also remain below the maximum regular rate. Those districts already at their statutory individual or regular maximum cannot increase their levy rate, so property tax revenues are reduced when property is removed from the tax rolls.

Generally, most districts are below their individual and regular maximum. All taxing districts in the State are subject to a maximum tax revenue increase of 1 percent per year, plus an adjustment for new construction. As assessed values have increased faster than 1 percent, the levy rates needed to sustain a revenue growth of 1 percent per year have actually fallen in many areas. In this case, levy rates are below the legal maximum and levy rates can be increased to compensate for a property removed from the tax rolls. Special levies are approved by the voters in a district as a total dollar amount, not a levy rate. Property tax rates for special levies can be increased to maintain the fixed dollar amount. Analysis of 2004 data from the Department of Revenue shows that 94.1 percent of the locally assessed value in the State is in districts where tax rates are less than the maximum statutory rate, or there is no maximum rate (WDR, 2004).<sup>1</sup>

Increased tax levies clearly impose an additional burden on property owners in the region, so the “ability” to increase tax levy rates may need to consider political resistance to this approach. From the perspective of local property owners, increased levy rates and increased property tax payments represent a cost. From the local government perspective, increased levy rates compensate for the revenues lost due to public acquisition. From the total local perspective, and before counting any effects in Sections 2.2.3 to 2.2.7 below, the net effect of the public acquisition is a cost.

Issues about levy rates extend beyond the present. The levy rate might reach the maximum in the future if property values decline, if public costs increase, or if cumulative effects of tax exemptions are large. This analysis does not try to deal with these more complex issues.

The effects of a levy rate increase are increased tax revenues, increased costs to other property owners and a change in the distribution of tax revenue losses across local agencies.

Potential measures: levy rates, property tax revenues by jurisdiction, property owner tax costs

### 3.3 Economic Activity Effects and Sales and Excise Taxes

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<sup>1</sup> This analysis did not include state school districts

Economic activity involves the production, distribution and consumption of goods and services in the economy. Common economic activity measures are value of production, sales, expenditures, employment and income.

If the acquisition may affect local economic activity in the foreseeable future, then types and levels of activity under the current use, the expected future development, and the proposed use should all be considered. If there is an expected future development, the relocation effect should be considered to decide if expected future development can be ignored.

Some of the effects on sales and income will find their way into local government revenues. Economic activity results in sales, use and excise taxes, and user fees. The major local sales taxes are the basic and optional rates (up to 1 percent), other local sales taxes (mostly public transit, criminal justice and correctional facilities), hotel/motel taxes, and the timber excise tax (4 percent of sales). A local business and occupation tax applies in some cities.

The economic analysis should include multiplier effects (rounds of business and household spending) in the local economy and their effects on local government revenues. These effects can be estimated using input-output (I-O) models, but secondary models are only available to the county level (IMPLAN, for example, MIG 2004), and they may not be accurate for estimated incremental effects of a land use change. For a small, local economy, the share of direct expenditure that is spent locally, and the share of this money that is respent locally are important determinants of multiplier effects. The analysis should also consider forward linkage effects in forward processing, storage and distribution within the county.

### 3.3.1 Current Use

With an acquisition, the economic activity from the current use may be lost. Current use is likely to be agriculture, timber, or simply undeveloped. Direct economic activity associated with current use may include crop, livestock or timber production and sales, payment of wages and salaries, and employment. Indirect economic activity involves sales by other businesses to the direct activity, economic activity in forward linked industries, and induced spending from local expenditure of wages and salaries. Direct and indirect expenditures by workers and businesses result in retail sales and sales taxes, and government services may be required.

The question of how much economic activity to count for land removed from its current use is important. The amount of regional economic activity provided by a piece of land depends on business levels (sales volume, for example), but it also depends on where the business buys its supplies, who receives the income and where those people spend their money. When land is converted from its current use, the economic activity on that land may relocate elsewhere in the region, so it is not actually lost from the regional economy. Typically, agricultural and forestry activities can not relocate elsewhere in the local area

because the available land base is already being fully utilized to the extent allowed by economics and regulatory factors.

Data on sales and expenditures per unit area for agriculture and timber are available from enterprise budgets produced by cooperative extension and other university sources. The TLM includes data from one study of timberlands in Washington (Blanchard, 2004) which includes multiplier effects.

Potential measures: value of output, income, employment, local expenditure, retail sales, sales and excise taxes

### 3.3.2 Proposed Use

The proposed use of land is likely to be preservation, recreation or both. Land acquisitions for recreation will have much different effects on local governments than land acquisitions for preservation. For recreation, economic activity that may benefit the regional economy includes *park expenditures*; for park development, operations and maintenance (construction, expenditures for local services, and payment of wages and salaries), and *visitor expenditures*; spending by visitors that becomes local economic activity. Park expenditure data can be derived from expected operating and staffing plans, and information about where park expenditures will occur.

The economic effects of public lands are of continuing interest to policymakers (WIAC, 1999). Studies are available that assess economic impacts and tax revenues attributable to visitors to Washington state parks (Dean Runyan Associates, 2002) Table 1 shows average daily spending of visitors to Washington state parks by type of visitor.

Type of visitor	Type of expenditure				Total
	Accommodations	Travel	Recreation	Food & Other	
Stayed overnight in park	\$3.70	\$7.50	\$2.10	\$16.50	\$29.80
Stayed in a hotel/motel	\$33.90	\$7.30	\$2.00	\$26.20	\$69.40
Stayed in another campground	\$5.80	\$11.40	\$3.50	\$21.80	\$42.50
Traveled 50 miles or more	\$0.00	\$4.10	\$2.10	\$9.50	\$15.70
Traveled less than 50 miles	\$0.00	\$2.30	\$1.70	\$5.80	\$9.80

Source: Dean Runyan Associates

One study is available that considers a site-specific trade-off between recreational use and timber use (Cedar River Group et al, 2002). Estimated recreational spending impacts under three visitation levels are shown in Table 2 below.

**Table 2.**  
**Annual Impact of Blanchard Mountain Recreational Visits in Skagit and Whatcom Counties**

Visitation level (visits/yr)	Output	Employment	Labor Income	Output/acre	Labor Income/acre	State B&O Tax	State Sales Tax	Local Sales Tax	Motor Vehicle Tax
30,000	\$320,000	4	\$119,000	\$66	\$25	\$3,537	\$24,382	\$6,337	\$15,128
40,000	\$427,000	5	\$159,000	\$88	\$33	\$4,716	\$32,509	\$8,449	\$20,171
50,000	\$534,000	6	\$199,000	\$111	\$41	\$5,895	\$40,637	\$10,561	\$25,213

A number of other studies assess economic impacts of specific outdoor recreation activities (Caudill, 2003). A spreadsheet tool is available to assist calculations of economic impact (Stynes and Propst, undated). Detailed data by type of activity are provided by USDA, USDI (1997). Average expenditures per day for 12 recreation activities are provided for residents and nonresidents by region.

The question of how much local economic activity to credit to a new park is important. Money will be spent because of the new park, but this does not answer the right question, which is: with the new park, how much more money will be spent in the regional economy?

Most of the studies cited above address the total amount of visitor expenditure, not where the money is spent, or how an incremental change in recreational opportunities affects economic activity “Any economic assessment of recreational lands and facilities must occur in the context of the larger recreation sector” (Dean Runyan Associates 2002).

The differences between visitor expenditure and change in local economic activity are:

- Total visitor expenditures do not count the share of expenditure spent in the local economy as opposed to other regions

The local perspective raises a number of important issues about where visitors spend their money. Some of the expenditure by non-locals happens before the trip or on their way to the park, not in the local economy. For the local economic impact analysis, we would like to know how much the new park increases their spending in the local area. Economic data to answer these questions are not readily available.

- Total visitor expenditures do not consider the share of expenditure spent in the local economy that would be spent there even without the new park.

Some of the park visitors will be local people who, without the park, would have spent their money somewhere else within the region. Their regional spending is not increased by the park. Other local people would have traveled out-of-region for their recreation, so perhaps the new park causes them to retain money in the regional economy.

Spending by non-locals is important since their money is new to the region. However, without the park, some non-locals would have simply visited a different site in the region, so their spending in the local area is not increased. Possibly, if the park provides camping, they will be able to avoid spending for accommodations, so they could actually spend less.

The regional economy can be viewed as an importer and exporter of money. The best park from the perspective of local economic activity is one that retains more spending by locals in the region (reduces money exports) and brings in more non-local spending (increases money imports).

For a proposed use of recreation, any plans for recreation development should be considered. The analysis should consider the types of activities to be allowed and the amount of planned access and development to enable the activities. Activity levels might be estimated by extrapolating from levels at similar existing facilities. Recreation expenditure data are available, but the share of expenditure spent locally should be estimated from site-specific information. Expenditure patterns, in terms of local versus out-of-region spending, depend on site-specific characteristics.

Potential measures: value of output, income, employment, local expenditure, retail sales, sales and excise taxes

### 3.4 Effects on Other Property Values and Property Taxes

There is a large amount of economic literature that documents the effects of public land acquisition and management on benefits for local residents, residential property values, and local property taxes. Public land acquisitions can affect local residents and their property values in four ways: 1) proximate residential values, 2) other amenity effects, 3) property market effects, and 4) economic activity and tax effects.

**Proximate Residential Values.** There is a large amount of literature that documents increases in the value of residential property adjacent to or near open space and park lands. (Crompton, 2004; King and Anderson 2004; Irvin, 2002). Usually, the evidence is provided by hedonic pricing methods where statistics are used to isolate the contribution of property characteristics, such as distance from open space, to its value.<sup>2</sup> These property value contributions also represent economic benefits for people who own the properties, and property tax revenues increase as assessed values increase.

Crompton (2004) summarizes the available studies and provides a proposed measurement system. For residential properties adjacent to a passive use open space, where the land does not result in any disamenities (noise, crime or nuisances), property values may be increased 20 percent. Residential property values for parcels within 500 feet of a park are increased 15%, 10% or 5% for parks that are unusually excellent, above average or

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<sup>2</sup> A cross-section of data on property prices from a property market are used with data on the characteristics of the property to estimate an equation which can calculate an expected value for a property given its characteristics.

average, respectively. For large parks, property values may be increased up to 1,500 to 2,000 feet away. Although the percent increase may be smaller (0 to 5 percent) the amount of property in this distance range may be quite large.

**Other Amenity Effects.** Other literature documents the positive influence of environmental amenities such as water quality on property values, even for properties that are located far from the acquired property (Barranger, 1974; Legget and Bockstael, 1998).

The amenities that should be considered are:

- **Recreation Opportunities.** Will the property provide a significant increase in recreation opportunities for the local area?
- **Water Quality?** Will management of the property improve surface water quality to the benefit of residents of the local area?
- **Fish and Wildlife Production?** Will management of the property increase production of valuable fish and wildlife that are enjoyed within the region?
- **Air Quality?** Will management of the property improve air quality in the region?

There are also some potential disamenities that should be counted. Open space can harbor animals such as birds or deer that are damaging to agricultural operations. The public acquisition might cause increased traffic and congestion.

**Property market effects.** Acquisitions can increase other property values simply by the laws of supply and demand. Market effects involve the change in market value of all properties caused by changes in demand and supply.

First, the relocation effect is considered to see if there is an effect in terms of land available for development at the local level. If so, the size of a property price effect depends on the size of the acquisition relative to the entire property market for the type of property involved, and the characteristics of demand and supply within that market. If demand is inelastic, then a change in the amount of property offered for sale in a market will have a relatively large effect on the quantity people want to buy.<sup>3</sup> If supply is also inelastic, then a price increase will induce a relatively small increase in property offered for sale. Therefore, the effect of an acquisition on property price is greater where the acquisition represents a larger share of the market for that type of property, and where demand and supply are more inelastic.

**Economic activity and tax effects.** Acquisitions that change the type of land use can affect property values by changing the demand for housing and for land to provide infrastructure and services needed for the land use. As an extreme but more obvious example, suppose that a developer is considering developing the property for an industrial park, and if the property is acquired for preservation, the developer would take his plans out of the local area. The “loss” of the industrial park might be substantial in

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<sup>3</sup> Elasticity refers to the relative responsiveness of a cause and effect relationship, in this case, the percent change in property quantity demanded or supplied due to a percent change in property price.

terms of economic activity and potential impacts on local residential property demand and value.

Increased property tax bills caused by changes in levy rates, changes in other property values and changes in government costs (see below) can all have a significant effect of local property tax rates. Some studies have found that “local variations in property taxes have sizable effects on commercial and industrial property values, and on the amount of commercial and industrial real estate located in a particular jurisdiction” (McDonald, 1996). In most cases, and potential change in tax rates from acquisition(s) will be small. However, a large acquisition could be a significant share of the tax base in a local taxing jurisdiction, or an acquisition could substantially increase local residential property values. In these cases, the changes in property tax revenues might be enough to cause a significant change in levy rates, thereby affecting property values.

Potential Measures: Property values, property tax revenues

### 3.5 Local Government Costs

The costs of providing local government services to a property is strongly influenced by its characteristics. Much literature documents the relationship between different types of land use and costs to local government. Cost of Community Services (CCS) studies consistently show that local government costs of open space, agricultural land, and commercial and industrial development are less than the revenues obtained, but the costs of residential land use exceed the local government revenues (American Farmland Trust, 2002a). Studies from Washington suggest that public costs associated with residential development exceed revenues by about 25 percent, but costs associated with agricultural land and open space are a quarter to half the amount of revenue obtained (American Farmland Trust, 2002b; Friends of the San Juans, 2004). If this is true, then public land acquisition that displaces residential growth out of a region might actually reduce property taxes for all other property owners. If local government costs are reduced more than tax revenues are reduced, then property taxes can be reduced even after accounting for the initial revenue loss.

There are some potential issues with CCS studies that imply that these results should not be extended to any incremental effect of a land acquisition. These potential issues are; the use of averages to extrapolate to new development, the inter-relationships between residential and non-residential development which are ignored, and relationships between growth and property values (Prindle and Blaine, 1998). For example, residential properties are often judged to be the most expensive to serve because costs of schools are assigned completely to the residential land use category. In fact, a new development might be targeted to persons who would not bring school age children to the area, the residential development might be needed to provide housing for a business that provides tax revenues far in excess of costs, and the residential development might eventually induce growth that would increase other tax revenues. These types of issues argue for an approach tailored to each individual development. Still, results of CCS studies are solid enough to conclude that government costs should be an important part of the equation.

Costs of serving development in a floodplain are often larger than costs of other development, and costs of serving development in relatively remote areas may exceed costs of serving existing urban areas. If land acquisitions occur in areas that would otherwise result in larger than average government costs, then costs may be reduced. Site-specific costs of serving the acquired land can be important. If the new public landowner does maintain the property properly, this can result in extra local government costs.

Potential measure: Local government costs

### 3.6 Existing programs and inter-jurisdictional transfers

There are existing State programs that will compensate local governments for reduced revenues or increased costs associated with public land acquisitions, and these programs can be factored in before considering the need for additional compensation. For example, local governments are normally compensated for additional infrastructure and operating costs associated with State Parks.

Potential measure: Local government revenues from the State

#### **4. Testing Level Methodology**

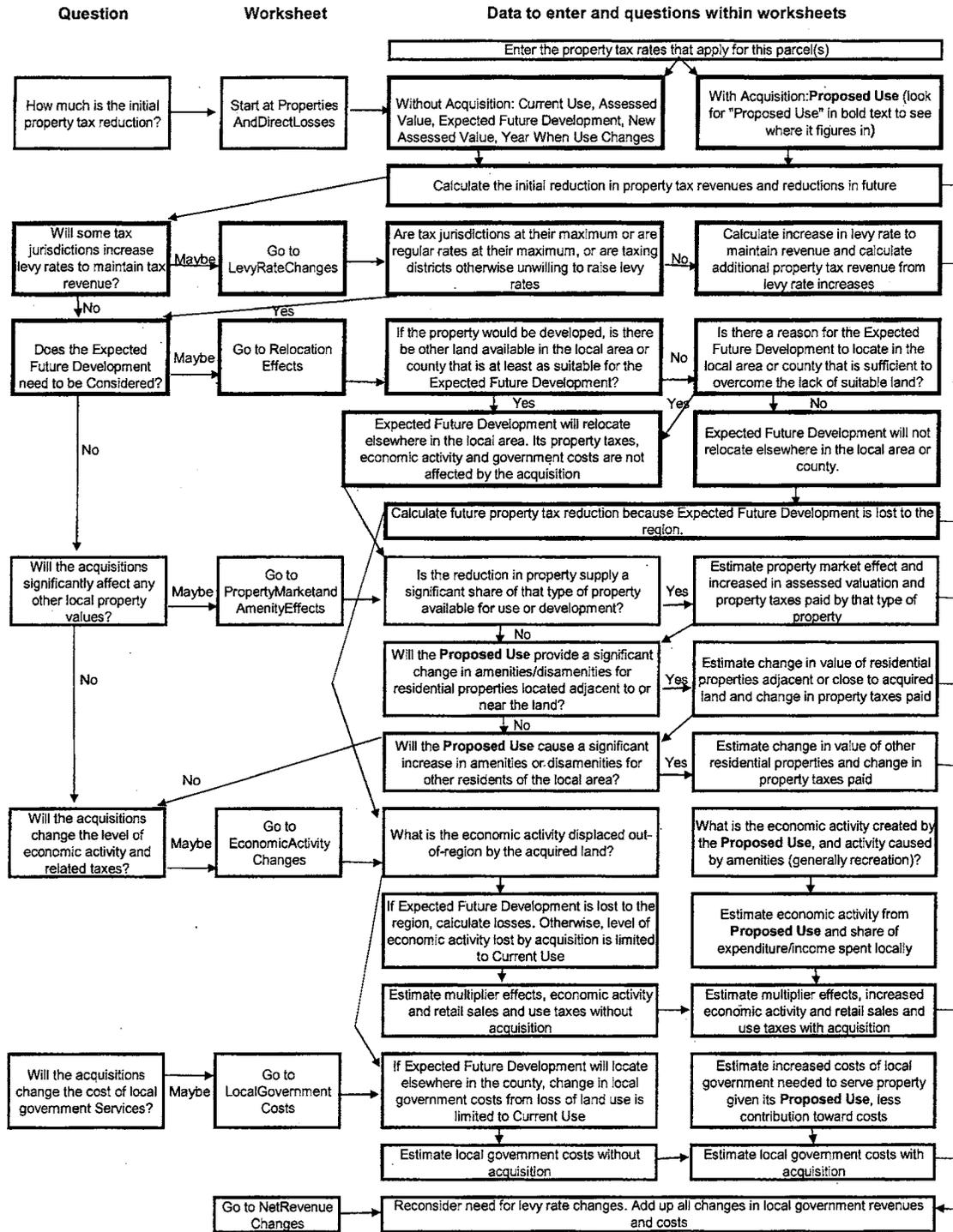
This project developed a testing-level methodology (TLM) to help identify and estimate the economic effects discussed in this report. The purpose of this development was to determine if a quantitative methodology could be developed and implemented to estimate economic effects for a range of possible public land acquisitions. The TLM emphasizes effects on local government finances, but local economic effects can also be counted.

The TLM is implemented in an Excel spreadsheet. The TLM includes worksheets that correspond to different types of economic effects, and one worksheet summarizes results and compares effects on local government revenues to current levels. These worksheets are followed by worksheets of data on property tax revenues and tax rates, property tax exemptions and public lands, sales and excise tax rates, activity levels and revenues that have implications for local governments, and data on local government expenditures. Most data are provided at the county level; some data related to more local government tax rates are provided. Year 2003 data were used if available.

The TLM currently evaluates two example properties drawn from Yakima County. Data on the assessed value of these properties, tax rates and revenues are believed to be accurate, but scenarios regarding proposed use and expected future use are fabrications provided only to demonstrate how the methodology would be applied. It is assumed that the proposed uses for the two properties are open space and recreation, and both properties have an expected future development of residential.

The TLM includes a decision tree to help a user decide which types of effects should be included and which worksheets can be ignored. The decision tree is reproduced in Figure 2. below.

Figure 2. Decision Tree to Guide Users through a TLM Analysis



#### 4.1 Initial Property Tax Revenue Reduction and Levy Rates

The initial property tax reduction from public acquisition of a property can be easily and accurately measured. County assessor's offices are required to keep all of the information needed for this step. There is some variation among counties in terms of how much work may be required to obtain this information. Usually, the cost of developing this information would be small to near zero.

The amount of levy rate increase needed to maintain property tax revenues can be calculated from the existing levy rate, the existing assessed value of property, and the assessed value of the property to be removed from the tax rolls. An example is provided in the TLM.

Given recent conditions in Washington, the great majority of local tax areas will not be legally restricted from raising levy rates to maintain property tax revenues. This is because levy rates have been falling as property values have grown faster than the 1 percent limit on growth of property tax revenues.

There is an issue of whether or not a taxing district will choose to increase its levy rate in response to a public land acquisition. This issue should be addressed on a case-by-case basis. Also, increased levy rates do not compensate the local area for the initial property tax reduction, so the State may not want to consider levy rates in deciding on appropriate compensation.

#### 4.2 Current Use, Expected Future Development and Proposed Future Use

The TLM requires a user to identify current use, expected future development, and proposed use. The implications of these uses may include economic activity and related taxes, other property values and property taxes, and local government costs.

If, without the acquisition, the current use of the property would change, this can be an important consideration. Especially, the economic impacts of land developed for residential, commercial or industrial use can dwarf the impacts of land used for agricultural, open space or recreational purposes. Therefore, the TLM asks the user if expected future development might be important. If so, the TLM asks the user if the development might relocate within the local area. If so, then the development is not lost to the region, the public land acquisition will not have a related effect, and the expected future development can be ignored.

The proposed use for the acquired property matters. Depending on the characteristics of the property, how it is used, and local economic conditions, new economic activity in the region could be large relative to the current use, and some of the initial reduction in property and sales taxes could be offset. The TLM includes questions to determine if the proposed use might have important economic implications for the local area, and if so, information from secondary sources is provided that might help quantify these effects.

### 4.3 Property Market Effects

The TLM considers four types of property market effects; proximate values, amenity values, property market effects and property tax effects. These effects were discussed in Section 2.5 above. Other types of property market effects are not included because of a number of linkages between economic activity and property values that can not be modeled in a helpful way at this time.

The analysis first keys in on information on expected future development. If the expected future development is not expected to relocate within the local area, then an analysis of proximate and amenity values is suggested, because the acquisition results in a net increase in open space land in the local area. If the expected future development is expected to relocate within the local area, then an analysis of property values is recommended because the supply of land remaining for development will be reduced.

All four of the property market effects pertain to other property, so information about the other property must be provided. For proximate and amenity values, the user must confirm that the acquired property would actually provide a significant increase in amenities that would trigger these values. For proximate values, data on the assessed value of residential properties adjacent to, within 500 feet of, and within 2,000 feet of the acquired property must be provided. Data from the available literature suggests useful default values for the effects to include for property types, and adjustments are allowed for certain disamenities.

For amenity effects, data on the value of other residential properties that experience some amenities must be provided. The default method for evaluating amenity effects uses a rating scale for recreation opportunities, water quality, fish and wildlife production and air quality, and a default percent increase in assessed value per rating point. These default values are, at this point, based on judgment only. If proximate residential values have been counted, additional amenity effects should probably not be counted for properties within 2,000 feet of the acquired property.

For property market effects, the user must input the current assessed value of all similar property available for sale, in the long run, in the property market area. Property that is assessed at current use is not included because this property will not pay increased property taxes even if its true and fair value increases. The user should also provide the elasticity of demand and supply for property in this market. Default values of an absolute value of one (a neutral elasticity) are provided. This means that a 1 percent price increase will induce a one percent increase in quantity supplied and a 1 percent reduction in quantity demanded.

For property tax effects, information from the levy rates analysis is brought into the property market effects analysis. The net present value of the increased amount of taxes paid is estimated, and this amount is equivalent to the expected decline in property values because of the taxes.

#### 4.4 Economic Activity and Related Taxes

The TLM includes a worksheet to calculate economic activity and related taxes with current use, with the expected future use, and with the proposed use. Several different approaches are provided. In one approach, the user must estimate the amount of economic activity per acre for each types of land use. Economic activity is employment, or visitation for recreation, or the number of residences, for residential use. Then, the dollar amount of economic activity created for each unit of activity is input. For employment, this is wages and salaries per job; for visitation, expenditures per visit, and for residential, expenditure per household. These dollar levels of economic activity result in changes in retail sales and sales taxes. Unfortunately, there are no reliable sources of data for most of these relationships, the exception being retail sales tax rates. Some secondary information is available from the State input-output (IO) model, and through secondary IO model databases such as IMPLAN. IMPLAN data were not obtained for this effort.

A second approach uses data from the State IO model. IO models calculate the amount of income generated by a change in sales in different sectors of the economy, and they include the indirect effect and induced effects caused by re-spending of business and household income in a region. The State IO model can be used to estimate the change in retail sales for a given change in value of output in any of the forty economic sectors included in the model. The additional information needed is the change in value of output created by the type of economic activity; specifically, the current use, expected future developed or proposed use for the acquired property. Some assumptions are provided in the TLM to make the example possible.

For recreation, two approaches are provided. One approach extrapolates from data provided by a site-specific study of alternative uses for Blanchard Mountain in Skagit and Whatcom counties (Cedar River Group et al 2002). This study estimated economic impacts and local government revenue effects of using Blanchard Mountain for recreation or for timber production. Results have been extrapolated to a range of timber production per acre and visitation per acre for potential use in other acquisitions.

The projected visitation per acre for this site is far below averages experienced in the state park system. The TLM also provides estimates of visitation for selected parks by type of visitor, and estimates of expenditure and economic impacts from Dean Runyan Associates (2002). These data can be used to extrapolate to a new acquisition if visitation by type of visitor can be projected. A database of visitation for the entire state park system is included. If a user knows characteristics of the proposed use and can determine what state park might be similar, then the visitation data for this state park might be used.

#### 4.5 Local Government Costs

Two approaches are included. The first approach uses results of cost of community services studies from either Skagit County or San Juan County to estimate costs

associated with residential, commercial, industrial, open space/agricultural lands as a function of property taxes paid.

The second approach would use actual estimated costs of local government services provided for the current use, the expected future development and the proposed use. The relocation effect is important because local government costs are determined by the effect on land use county-wide, not just on the acquired property.

#### 4.6 Effects Summary

A worksheet is provided to summarize effects from all sources and to compare the effects to recent county revenues and expenditures. 2003 County financial data are provided for comparison.

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## Acquisition & Restoration Council 2005 Annual Florida Forever List

Group A Projects	
Project Name	County
Apalachicola River (FF/LTF)	Liberty / Gadsden / Calhoun / Jackson
Babcock Ranch (LTF)	Charlotte / Lee
Bear Creek (FF / LTF)	Calhoun / Bay / Gulf
Big Bend Swamp/ Holopaw Ranch (LTF)	Osceola
Bombing Range Ridge (FF / LTF)	Polk / Osceola
Brevard Coastal Scrub Ecosystem (FF/ SH)	Brevard
Caber Coastal Connector Tract (FF)	Levy
Camp Blanding - Osceola Greenway (FF/ LTF)	Baker / Union / Bradford / Clay
Corkscrew Regional Ecosystem Watershed (FF)	Collier / Lee
Coupon Bight / Key Deer (SH)	Monroe
Devil's Garden (FF)	Hendry / Collier
Escribrano Point (FF)	Santa Rosa
Etoniah / Cross Fla. Greenway (LTF / FF)	Putnam / Marion / Clay / Levy / Citrus
Fisheating Creek (LTF)	Glades / Highlands
Flagler County Blueway (FF)	Flagler
Florida Keys Ecosystem (FF)	Monroe
Florida Springs Coastal Greenway (FF)	Citrus
Florida's First Magnitude Springs (FF)	Bay/ Hernando/ Jackson/ Lafayette/ Leon/ Levy/ Madison/ Marion/ Wakulla/ Suwannee/ Washington/ Walton
Garcon Ecosystem (FF)	Santa Rosa
Green Swamp (LTF)	Lake / Polk
Indian River Lagoon Blueway (FF)	Volusia / Brevard / Indian River / St. Lucie/ Martin
Lafayette Forest (FF / LTF)	Lafayette
Lake Santa Fe (FF)	Alachua / Bradford
Lake Wales Ridge Ecosystem (FF/ LTF/ SH)	Highlands / Polk / Lake / Osceola
Letchworth Mounds (FF)	Jefferson / Leon
Nokuse Plantation (LTF)	Walton / Washington
North Key Largo Hammocks (SH)	Monroe
Northeast Florida Blueway (FF)	Duval / St Johns / Flagler
Northeast Florida Timberland & Watershed Reserve (FF / LTF)	Nassau / Duval / Clay
Ochlocknee River Conservation Area (LTF)	Leon
Okeechobee Battlefield (FF)	Okeechobee
Osceola Pine Savannas (FF)	Osceola
Panther Glades (FF/ LTF)	Hendry
Perdido Pitcher Plant Prairie (FF)	Escambia
Pine Island Slough (FF)	Osceola / Indian River
Promise Ranch (LTF)	Lake
Spruce Creek (SH)	Volusia
St. Joe Timberland (FF)	Gadsden / Gulf / Franklin / Leon / Wakulla / Liberty / Walton/ Bay / Jefferson / Taylor / Washington
Terra Ceia (FF)	Manatee
Tiger Island / Little Tiger Island (FF)	Nassau
Upper St. Marks River Corridor (FF)	Leon / Jefferson / Wakulla
Volusia Conservation Corridor (FF / LTF)	Volusia
Wacissa / Aucilla River Sinks (FF)	Jefferson / Taylor
Wakulla Springs Protection Zone (FF)	Wakulla
Wekiva-Ocala Greenway (FF)	Lake / Orange / Volusia / Seminole
Yellow River Ravines	Santa Rosa / Okaloosa
Group B Projects	
Annuteliga Hammock (FF)	Hernando / Citrus
Archie Carr Sea Turtle Refuge (FF)	Brevard / Indian River
Atlantic Ridge Ecosystem (FF)	Martin

Group B Projects - continued	
Baldwin Bay / St. Marys River (FF)	Nassau / Duval
Belle Meade (FF)	Collier
Caloosahatchee Ecoscape (FF)	Hendry / Glades
Carr Farm / Price's Scrub (FF)	Alachua / Marion
Catfish Creek (FF)	Polk
Charlotte Harbor Estuary (SH)	Charlotte / Lee / Sarasota
Charlotte Harbor Flatwoods (FF)	Lee / Charlotte
Clear Creek / Whiting Field (FF / LTF)	Santa Rosa
Dade County Archipelago (FF)	Miami-Dade
Dickerson Bay / Bald Point (FF)	Wakulla / Franklin
Econ-St. Johns Ecosystem (FF)	Seminole / Orange
Estero Bay (FF)	Lee
Gulf Hammock (FF / LTF)	Levy
Half Circle L Ranch (FF)	Collier / Hendry
Hall Ranch (FF)	Charlotte
Harris School (FF)	Monroe
Heather Island / Oklawaha River (FF)	Marion
Hixtown Swamp (FF)	Madison
Hosford Chapman's Rhododendron Protection Zone (FF / LTF)	Gadsden / Liberty
Ichetucknee Trace (FF)	Columbia
Kissimmee-St. Johns River Connector (FF)	Okeechobee / Indian River
Lake Hatchineha Watershed (FF)	Osceola / Polk
Little River Conservation Area (LTF)	Gadsden
Lochloosa Wildlife (SH)	Alachua
Longleaf Pine Ecosystem (FF)	Gilchrist / Hamilton / Marion / Volusia
Lower Perdido River Buffer (LTF)	Escambia
Middle Chipola River (FF)	Jackson / Calhoun
Mill Creek (LTF)	Marion
Millstone Plantation (LTF)	Leon
Old Town Creek Watershed (LTF)	Hardee / Polk
Pal-Mar (FF)	Palm Beach / Martin
Pierce Mound Complex (FF)	Franklin
Pineland Site Complex (FF)	Lee
Pinhook Swamp (FF)	Baker / Columbia
Pumpkin Hill Creek (FF)	Duval
Ranch Reserve (LTF)	Osceola / Brevard / Indian River
San Felasco Conservation Corridor (LTF)	Alachua
San Pedro Bay (FF)	Madison / Taylor
Sand Mountain (FF)	Washington / Bay
Save Our Everglades (SH)	Collier
Searcy Estate (FF)	Wakulla
Southeast Bat Maternity Caves (FF)	Jackson / Marion / Sumter / Citrus / Alachua
South Walton County Ecosystem (SH)	Walton
St. Johns River Blueway (FF)	St. Johns
St. Joseph Bay Buffer (FF)	Gulf
Three Chimneys (FF)	Volusia
Twelve Mile Swamp (FF)	St. Johns
Twelvemile Slough (FF)	Hendry
Upper Shoal River (FF/ LTF)	Walton
Watermelon Pond (FF / LTF)	Alachua / Levy

**Legend:**

- (FF): Full-Fee: projects proposed to be purchased in Fee Simple.
- (LTF): Less-Than-Fee: property stays with the owner, but conservation easements or other means preserve the environmental value of the land.
- (SH): Small Holdings: projects made of small ownerships with individual values generally not exceeding \$1,000,000.



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# Florida Forever Status

As of January 31, 2005

Agency	Percent Distribution	Available Appropriation [3]	Expenditures as of 01/31/05	Acres	Approved Commitments [1]	Acres	Anticipated Acquisitions	Acres
DEP-State Lands	[4] 35.00%	\$ 460,972,000.00	\$ 321,096,171.89	179,443.23	\$ 77,928,858.13	24,696.74	\$ 527,900,762.78	180,121.36
DEP-Rec & Parks	[4] 1.50%	\$ 22,497,571.77	\$ 22,127,094.38	4,219.91	\$ 46,698.00	60.28	\$ -	-
FRDAP	[4] 2.00%	\$ 23,989,535.67	\$ 8,364,223.26	16.42	\$ 15,081,485.34	20.00	\$ -	-
FWCC	1.50%	\$ 22,500,000.00	\$ 11,856,585.08	6,540.44	\$ 88,000.00	4.80	\$ 36,466,500.00	23,499.53
DACS-Forestry	1.50%	\$ 22,500,000.00	\$ 17,301,208.24	11,578.69	\$ 649,004.00	40.00	\$ 8,170,000.00	7,688.20
DEP-Rails to Trails	1.50%	\$ 22,500,000.00	\$ 7,882,862.68	1,325.78	\$ 807,372.00	10.64	\$ 13,407,000.00	2,373.31
DCA	22.00%	\$ 336,000,000.00	\$ 217,454,445.97	17,937.40	\$ 96,925,018.49	12,895.29	\$ 22,430,914.00	1,588.11
DEP-Aid to WMD	35.00%	\$ 525,000,000.00	\$ 241,983,210.81	121,826.76	\$ 111,830,699.42	19,027.32	\$ 110,616,278.09	44,342.43
NFEWMD	7.50%	\$ 39,375,000.00	\$ 8,387,138.59	4,750.32	\$ 3,506,532.00	-	\$ 5,386,474.50	4,973.60
SFWMD	[2] 35.00%	\$ 133,750,000.00	\$ 37,922,613.44	3,652.26	\$ 30,746,528.00	1,786.85	\$ 25,118,300.00	100.83
SRWMD	25.00%	\$ 131,250,000.00	\$ 44,676,072.28	38,440.24	\$ 54,201,493.42	10,330.47	\$ 14,981,566.59	14,310.00
SRWMD	7.50%	\$ 39,375,000.00	\$ 22,015,278.19	54,181.00	\$ 2,168,200.00	1,401.00	\$ 13,851,600.00	18,516.00
SFWMD	25.00%	\$ 131,250,000.00	\$ 78,982,108.31	20,802.94	\$ 21,207,946.00	5,509.00	\$ 51,278,337.00	6,442.00
SFWMD-Everglades	[2]	\$ 50,000,000.00	\$ 50,000,000.00	-	\$ -	-	\$ -	-
<b>TOTAL</b>	<b>100.00%</b>	<b>\$ 1,435,959,107.44</b>	<b>\$ 848,065,802.31</b>	<b>342,888.63</b>	<b>\$ 303,357,135.38</b>	<b>56,755.07</b>	<b>\$ 718,991,454.87</b>	<b>259,612.94</b>

[1] Projects approved by the Board of Trustees, Water Management District Boards, approved grant awards by the Florida Communities Trust Board or DEP/Division of Recreation & Parks/FRDAP.

[2] SFWMD \$50M reduction is for transfer to the Save Our Everglades Trust Fund. Additionally, SFWMD-Everglades \$50M does not reflect acres as transaction was a transfer to the Save Our Everglades Trust Fund.

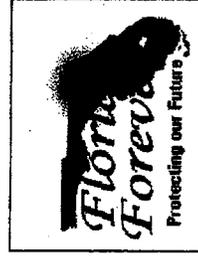
[3] Available appropriation for each agency is based on the \$1,435,959,107.44 appropriation currently authorized.

[4] For a breakdown of adjustments to appropriation, please see individual sheets for each Series.

Available Florida Forever Cash Balance as of January 31, 2005 is: **\$250,553,687.23**

STLANDS/Florida Forever/Bonds.XLS

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# Florida Forever

## Estimated Cash Needs for Real Estate Closings As of January 31, 2005

### Cash Needs Summary With Scheduled Closings

Account	Actual Cash Expenditures											
	July 2001 - June 2002	July 2002 - June 2003	July 2003 - June 2004	July 04	Aug 04	Sep 04	Oct 04	Nov 04	Dec 04	Jan 05	Feb 05	Mar 05
DEVELOPMENT	\$ 83,191,584.04	\$ 162,895,292.01	\$ 59,998,924.40	\$ 1,133,719.19	\$ 1,788,372.34	\$ 3,297,041.30	\$ 7,187,578.37	\$ 3,072,564.21	\$ 2,273,323.48	\$ 5,304,312.39	\$ -	\$ -
OPERATION & MAINTENANCE	\$ 2,678,850.46	\$ 1,776,545.90	\$ 4,825,100.97	\$ 86,263.24	\$ 557,951.72	\$ 77,632.43	\$ 120,870.58	\$ 18,772.10	\$ 5,968,349.98	\$ 16,747.00	\$ -	\$ -
REPAIRS	\$ -	\$ 2,099,265.92	\$ 4,238,044.91	\$ 268,839.31	\$ 340,837.05	\$ 93,396.58	\$ 50,000.00	\$ 230,139.36	\$ 707,194.84	\$ 336,506.29	\$ -	\$ -
TRAVEL	\$ 568,440.35	\$ 1,759,453.88	\$ 9,289,723.58	\$ 78.00	\$ 47,860.39	\$ -	\$ 41,400.59	\$ 76,890.90	\$ 61,734.57	\$ 19,557.78	\$ -	\$ -
UTILITIES	\$ 970,292.53	\$ 4,941,951.80	\$ 1,899,789.06	\$ 63,450.42	\$ 36,995.25	\$ 21,185.25	\$ 16,262.50	\$ 9,684,480.95	\$ 155,940.48	\$ 40,990.00	\$ -	\$ -
OFFICE - JANUARY THROUGH	\$ -	\$ 5,571,569.96	\$ 1,801,068.69	\$ 37,893.94	\$ 150,417.05	\$ 60,138.46	\$ 33,156.86	\$ 17,237.76	\$ 25,528.08	\$ 196,851.88	\$ -	\$ -
INVESTMENT	\$ 6,393,115.81	\$ 390,428.78	\$ 1,603,594.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
STAFFING	\$ 25,000,000.00	\$ 36,863,453.13	\$ 3,138,291.69	\$ 589,848.66	\$ 5,520,462.54	\$ 1,390,425.77	\$ 6,159,567.15	\$ 123,348.68	\$ 8,381,900.39	\$ 1,279,763.61	\$ -	\$ -
STAFFING	\$ 12,195,166.82	\$ 11,259,499.97	\$ 9,578,759.57	\$ 640,183.35	\$ 29,511.88	\$ -	\$ 4,744,167.44	\$ 265,370.34	\$ 151,525.88	\$ 6,041,585.11	\$ -	\$ -
STAFFING	\$ 9,512,329.88	\$ 4,753,675.25	\$ 3,207,632.96	\$ -	\$ 1,511,250.00	\$ 2,435,200.00	\$ -	\$ 595,200.00	\$ -	\$ -	\$ -	\$ -
STAFFING	\$ 2,818,826.45	\$ 4,977,254.26	\$ 47,245,827.39	\$ 208,938.00	\$ (61,938.00)	\$ 828,000.58	\$ 264,902.50	\$ (800.90)	\$ 22,706,178.03	\$ -	\$ -	\$ -
DECA	\$ 4,782,343.88	\$ 97,526,066.44	\$ 73,292,771.84	\$ 6,154,811.87	\$ 5,764,085.79	\$ 9,160,931.63	\$ 4,024,658.79	\$ 2,511,824.04	\$ 4,551,633.30	\$ 7,679,883.83	\$ -	\$ -
<b>Actual Expenditures</b>	\$ 150,111,950.02	\$ 340,309,077.60	\$ 373,917,717.85	\$ 9,173,025.98	\$ 15,685,826.01	\$ 17,343,922.00	\$ 22,642,304.78	\$ 16,594,607.04	\$ 44,983,298.93	\$ 20,913,276.89	\$ -	\$ -
<b>LTD Cumulative Expenditures</b>	\$ 150,111,950.02	\$ 490,421,027.62	\$ 706,710,540.68	\$ 709,883,566.66	\$ 725,569,392.67	\$ 742,933,314.67	\$ 765,575,619.45	\$ 782,170,226.49	\$ 827,153,525.42	\$ 848,065,802.31	\$ -	\$ -

Available Florida Forever Cash Balance as of January 31, 2005 is: \$250,553,687.23

# Florida Forever

## Estimated Cash Needs for Real Estate Closings As of January 31, 2005

### Cash Needs Summary With Scheduled Closings

Agency	Projected Cash Needs (Based on Encumbrances & Anticipated Contracts)												Totals	
	February	March	April	May	June	July	Beyond 6 Months	Dollars	%					
DEP - State Lands	\$ 22,346,057.74	\$ 19,877,063.00	\$ 17,177,128.48	\$ 4,669,266.55	\$ 16,584,864.33	\$ -	\$ 52,570,200.00	\$ 605,329,620.91	\$ 0.59					
DEP - Rec & Parks	\$ 800.00	\$ 19,648.00	\$ 10,000.00	\$ 16,250.00	\$ -	\$ -	\$ -	\$ 46,698.00	\$ 0.00					
FWD/AF	\$ 966,058.23	\$ 236,186.96	\$ 200,000.00	\$ -	\$ -	\$ -	\$ 13,679,203.15	\$ 15,081,485.34	\$ 0.01					
KWCC	\$ -	\$ 250.00	\$ 6,250.00	\$ 99,200.00	\$ 75,000.00	\$ 4,608,500.00	\$ -	\$ 5,589,450.00	\$ 0.01					
DACS - Forestry	\$ 191,550.00	\$ 487,411.00	\$ -	\$ 7,100,000.00	\$ 1,070,000.00	\$ -	\$ -	\$ 8,819,000.00	\$ 0.01					
DEP - Rails to Trails	\$ 192,372.00	\$ -	\$ 75,000.00	\$ 540,000.00	\$ 210,000.00	\$ -	\$ -	\$ 1,421,372.00	\$ 0.01					
INVESTMENT	\$ -	\$ 231,724.50	\$ 4,551,282.00	\$ 1,050,000.00	\$ 620,000.00	\$ 850,000.00	\$ -	\$ 9,993,006.50	\$ 0.01					
SEWARD	\$ 2,057,150.00	\$ 420,052.00	\$ 3,967,519.00	\$ 16,773,066.00	\$ 6,170,000.00	\$ -	\$ 21,676,841.00	\$ 55,366,878.00	\$ 0.05					
SURWARD	\$ 1,627,846.22	\$ 7,701,388.03	\$ 11,423,562.08	\$ 1,707,452.21	\$ 9,544,599.98	\$ 250,693.25	\$ 36,229,532.24	\$ 88,103,660.01	\$ 0.07					
SURWARD	\$ 674,000.00	\$ 692,000.00	\$ 225,000.00	\$ 390,000.00	\$ -	\$ 595,200.00	\$ -	\$ 1,819,300.00	\$ 0.02					
SURWARD	\$ 4,375,500.00	\$ 3,096,000.00	\$ -	\$ -	\$ -	\$ -	\$ 64,713,783.09	\$ 72,486,283.00	\$ 0.07					
TRCA	\$ 6,119,500.20	\$ 7,251,569.86	\$ 6,350,727.82	\$ 12,040,610.68	\$ 5,183,560.00	\$ 83,399,280.73	\$ 29,030,914.06	\$ 139,325,928.85	\$ 0.12					
Cumulative Expenditures	\$ 886,414,540.77	\$ 926,791,934.06	\$ 975,778,403.44	\$ 1,021,214,248.88	\$ 1,061,032,073.19	\$ 1,120,743,727.17	\$ 1,870,414,397.56	\$ 1,022,348,590.25	\$ 1.00					
Projected Expenditures	\$ 38,348,738.46	\$ 40,377,493.29	\$ 48,986,469.38	\$ 45,435,845.44	\$ 39,817,824.31	\$ 59,711,653.95	\$ 749,670,665.39	\$ 1,022,348,590.25						

Available Florida Forever Cash Balance as of January 31, 2005 is: \$250,553,687.23

Florida Forever  
Series I  
As of January 31, 2005

Agency	Percent Distribution	Available Appropriation	Expenses as of 01/31/05	Projected Cash Needs							Balance		
				February	March	April	May	June	July	Beyond 6 Months		Total	
DEP-State Lands	35.00%	\$ 105,000,000.00	\$ 405,000,000.00									\$ 105,000,000.00	\$ -
DEP-Rec & Parks	1.50%	\$ 4,500,000.00	\$ 4,500,000.00									\$ 4,500,000.00	\$ -
FRDAP	2.00%	\$ -	\$ -									\$ -	\$ -
FWCC	1.50%	\$ 4,500,000.00	\$ 4,500,000.00									\$ 4,500,000.00	\$ -
DACS-Forestry	1.50%	\$ 4,500,000.00	\$ 4,500,000.00									\$ 4,500,000.00	\$ -
DEP-Roads to Trails	1.50%	\$ 4,500,000.00	\$ 4,500,000.00									\$ 4,500,000.00	\$ -
DCA	22.00%	\$ 72,000,000.00	\$ 72,000,000.00									\$ 72,000,000.00	\$ -
DEP-Aid to WMD	35.00%	\$ 105,000,000.00	\$ 105,000,000.00									\$ 105,000,000.00	\$ -
NRFWMID	7.50%	\$ 7,875,000.00	\$ 7,875,000.00									\$ 7,875,000.00	\$ -
SFWMD	35.00%	\$ 11,750,000.00	\$ 11,750,000.00									\$ 11,750,000.00	\$ -
SJRWMD	25.00%	\$ 26,250,000.00	\$ 26,250,000.00									\$ 26,250,000.00	\$ -
SRWMD	7.50%	\$ 7,875,000.00	\$ 7,875,000.00									\$ 7,875,000.00	\$ -
SFWWMD	25.00%	\$ 26,250,000.00	\$ 26,250,000.00									\$ 26,250,000.00	\$ -
SFWMD-Everglades		\$ 25,000,000.00	\$ 25,000,000.00									\$ 25,000,000.00	\$ -
TOTAL	100.00%	\$ 300,000,000.00	\$ 300,000,000.00									\$ 300,000,000.00	\$ -

Appropriation is funded with cash proceeds from the sale of bonds.

**Florida Forever**  
**Series II**  
 As of January 31, 2005

Agency	Percent Distribution	Available Appropriation	Expenditures as of 01/31/05	Projected Cash Needs							Balance		
				February	March	April	May	June	July	Revised 6 Months		Total	
DEP-State Lands	35.00%	\$ 105,000,000.00	\$ 105,000,000.00									\$ 105,000,000.00	\$ -
DEP-Rec & Parks [1]	1.50%	\$ 4,497,571.77	\$ 4,497,571.77									\$ 4,497,571.77	\$ -
FRDAP	2.00%	\$ 5,994,197.98	\$ 5,994,197.98									\$ 5,994,197.98	\$ -
FWCC	1.50%	\$ 4,500,000.00	\$ 4,500,000.00									\$ 4,500,000.00	\$ -
DACS-Forestry	1.50%	\$ 4,500,000.00	\$ 4,500,000.00									\$ 4,500,000.00	\$ -
DEP-Rails to Trails	1.50%	\$ 4,500,000.00	\$ 4,500,000.00									\$ 4,500,000.00	\$ -
DCA	22.00%	\$ 66,000,000.00	\$ 66,000,000.00									\$ 66,000,000.00	\$ -
DEP-Aid to WMD	35.00%	\$ 105,000,000.00	\$ 89,833,210.87	\$ 6,427,812.00	\$ 6,427,812.00	\$ 4,551,282.00	\$ 1,050,000.00	\$ 620,000.00	\$ 850,000.00	\$ 850,000.00	\$ 59,344.91	\$ 105,000,000.00	\$ -
NWFWMD	7.50%	\$ 7,875,000.00	\$ 512,138.59									\$ 512,138.59	\$ -
SFWMD	35.00%	\$ 11,750,000.00	\$ 11,750,000.00									\$ 11,750,000.00	\$ -
SJRWMD	25.00%	\$ 26,250,000.00	\$ 16,426,072.28									\$ 16,426,072.28	\$ -
SRWMD	7.50%	\$ 7,875,000.00	\$ 7,875,000.00									\$ 7,875,000.00	\$ -
SWFWMD	25.00%	\$ 26,250,000.00	\$ 26,250,000.00									\$ 26,250,000.00	\$ -
SFWMD-Everglades	-----	\$ 25,000,000.00	\$ 25,000,000.00									\$ 25,000,000.00	\$ -
<b>TOTAL</b>	<b>100.00%</b>	<b>\$ 299,991,769.75</b>	<b>\$ 283,687,843.36</b>	<b>\$ 1,320,212.22</b>	<b>\$ 6,427,812.00</b>	<b>\$ 4,626,282.00</b>	<b>\$ 1,590,000.00</b>	<b>\$ 840,000.00</b>	<b>\$ 850,000.00</b>	<b>\$ 850,000.00</b>	<b>\$ 149,620.23</b>	<b>\$ 299,991,769.75</b>	<b>\$ -</b>

[1] February 2003 Reversion of Appropriation: Total \$8,230.25 (DRP \$2,428.23 - FRDAP \$5,802.02)

Appropriation is funded with cash proceeds from the sale of bonds.

**Florida Forever**  
Series III  
As of January 31, 2005

Agency	Percent Distribution	Available Appropriation	Expenditures as of 01/31/05	Projected Cash Needs							Total	Balance	
				February	March	April	May	June	July	Beyond 6 Months			
DEP-State Lands	35.00%	\$ 105,000,000.00	\$ -	\$ 105,000,000.00								\$ 105,000,000.00	\$ -
DEP-Rec & Parks	1.50%	\$ 4,500,000.00	\$ 4,500,000.00									\$ 4,500,000.00	\$ -
FRDAP [1]	2.00%	\$ 5,995,337.69	\$ 2,370,025.28									\$ 5,995,337.69	\$ -
FWCC	1.50%	\$ 4,500,000.00	\$ 2,856,585.88									\$ 4,500,000.00	\$ -
DIACS-Forcetry	1.50%	\$ 4,500,000.00	\$ 4,500,000.00									\$ 4,500,000.00	\$ -
DEP-Rails to Trails	1.50%	\$ 4,500,000.00	\$ -									\$ 4,500,000.00	\$ -
BCA	22.00%	\$ 66,000,000.00	\$ 66,000,000.00									\$ 66,000,000.00	\$ -
DEP-Aid to WMD	35.00%	\$ 105,000,000.00	\$ 46,937,891.63									\$ 105,000,000.00	\$ -
NWFWMD	7.50%	\$ 7,875,000.00	\$ -									\$ 7,875,000.00	\$ -
SFWMD	35.00%	\$ 36,750,000.00	\$ 14,422,613.44									\$ 36,750,000.00	\$ -
SJRWMD	25.00%	\$ 26,250,000.00	\$ -									\$ 26,250,000.00	\$ -
SRWMD	7.50%	\$ 7,875,000.00	\$ 6,265,278.19									\$ 7,875,000.00	\$ -
SWFWMD	25.00%	\$ 26,250,000.00	\$ 26,250,000.00									\$ 26,250,000.00	\$ -
<b>TOTAL</b>	<b>100.00%</b>	<b>\$ 299,995,337.69</b>	<b>\$ 232,164,501.99</b>	<b>\$ 2,731,750.00</b>	<b>\$ 2,527,352.53</b>	<b>\$ 20,616,081.08</b>	<b>\$ 12,698,239.58</b>	<b>\$ 9,534,599.98</b>	<b>\$ 258,693.25</b>	<b>\$ 1,530,145.09</b>	<b>\$ 10,073,567.26</b>	<b>\$ 293,650,482.78</b>	<b>\$ 6,344,854.91</b>

[1] February 2004 Reversion of Appropriation: FRDAP 54,662.31

Appropriation is funded with cash proceeds from the sale of bonds.

Florida Forever  
Series IV  
As of January 31, 2005

Agency	Percent Distribution	Available Appropriation [3]	Expenditures as of 01/31/05	Projected Cash Needs												Balance		
				February	March	April	May	June	July	Beyond 6 Months			Total					
DEP-State Lands [1]	35.00%	\$ 34,072,000.00	\$ 6,096,171.89	\$ 22,246,897.75	\$ 5,629,730.36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 34,072,000.00
DEP-Rec & Parks	1.50%	\$ 4,500,000.00	\$ 4,500,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,500,000.00
FRDAP	2.00%	\$ 6,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,000,000.00
FWCC	1.50%	\$ 4,500,000.00	\$ 3,894,208.24	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,500,000.00
DACS-Forestry	1.50%	\$ 4,500,000.00	\$ 191,593.00	\$ -	\$ 457,411.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,500,000.00
DEP-Rails to Trails	1.50%	\$ 4,500,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,500,000.00
DCA	22.00%	\$ 66,000,000.00	\$ 13,454,445.97	\$ 6,119,690.20	\$ 7,231,369.06	\$ 6,350,727.82	\$ 12,040,610.68	\$ 5,183,360.00	\$ 15,619,796.27	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 66,000,000.00
DEP-Aid to WMD	35.00%	\$ 105,000,000.00	\$ 232,106.31	\$ 4,172,500.00	\$ 3,600,000.00	\$ -	\$ 7,222,278.63	\$ 6,560,000.00	\$ 595,200.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 105,000,000.00
NWFWMD	7.50%	\$ 7,875,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,875,000.00
SFWMD	35.00%	\$ 36,750,000.00	\$ -	\$ -	\$ -	\$ -	\$ 5,891,000.44	\$ 6,170,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 36,750,000.00
SRWMD	25.00%	\$ 26,250,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 26,250,000.00
SRWMD	7.50%	\$ 7,875,000.00	\$ -	\$ -	\$ -	\$ -	\$ 1,331,278.19	\$ 390,000.00	\$ 595,200.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,875,000.00
SWFWMD	25.00%	\$ 26,250,000.00	\$ 232,106.31	\$ 4,172,500.00	\$ 3,600,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 26,250,000.00
TOTAL	100.00%	\$ 229,072,000.00	\$ 28,083,934.41	\$ 32,829,880.95	\$ 16,918,510.42	\$ 6,350,727.82	\$ 19,312,677.07	\$ 11,743,360.00	\$ 19,361,081.35	\$ 83,384,269.42	\$ 217,984,441.44	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 229,072,000.00

[1] DSL's Florida Forever 4th Series was appropriated as follows: From Florida Preservation 2000 Trust Fund \$70,928,000; From Florida Forever Trust Fund \$34,072,000 - GAA 1518A

Appropriation is funded with cash proceeds from the sale of bonds.

**Florida Forever**  
Series Y  
As of January 31, 2005

Agency	Percent Distribution	Available Appropriation [3]	Expenditures as of 01/31/05	Projected Cash Needs												Balance				
				February	March	April	May	June	July	Regional	Monthly	Total								
DEP-State Lands [1]	35.00%	\$ 111,900,000.00	\$ -	\$ 14,247,333.44	\$ 17,177,321.48	\$ 4,669,266.55	\$ 16,554,864.33	\$ -	\$ -	\$ -	\$ -	\$ 577,553,792.80	\$ -	\$ -	\$ -	\$ (465,953,792.80)				
DEP-Rec & Parks	1.50%	\$ 4,500,000.00	\$ -	\$ 800.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 323,779.39				
FRDAP	2.00%	\$ 6,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 543,827.07				
FWCC	1.50%	\$ 4,500,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
DAACS-Forestry	1.50%	\$ 4,500,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
DEP-Rails to Trails	22.00%	\$ 66,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
DCA	22.00%	\$ 66,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
DEP-Aid to WMD	35.00%	\$ 105,000,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
NFWFMD	7.50%	\$ 7,875,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
SFWMD	35.00%	\$ 36,750,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
SJRWMD	25.00%	\$ 26,250,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
SRWMD	7.50%	\$ 7,875,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
SWFWMD	25.00%	\$ 26,250,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -				
TOTAL	100.00%	\$ 306,900,000.00	\$ 4,129,522.61	\$ 800.00	\$ 14,266,981.44	\$ 17,187,128.48	\$ 11,795,728.79	\$ 17,674,864.33	\$ 37,779,464.46	\$ 61,862,601.79	\$ 61,862,601.79	\$ 66,810,578.46	\$ 61,862,601.79	\$ 43,137,398.21	\$ 7,875,000.00	\$ 36,750,000.00	\$ 17,390,867.71	\$ 1,339,921.81	\$ (20,218,391.31)	\$ (451,887,698.59)

[1] DSI's Florida Forever 5th Series consist of the \$105,000,000 - their 35% distribution for Florida Forever and \$6,900,000 for the land sale of Timber Island.

Appropriation is funded with cash transferred from General Revenue - \$263,100,000 and the P2000 Trust Fund - \$36,900,000 (CAA - 1584A).

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## The Trust Land Transfer program

### What is the purpose and history of the Trust Land Transfer program?

The Trust Land Transfer program was created as a plan to facilitate transactions that bring together three goals:

- protect special trust lands
- provide funds for school construction
- reposition trust lands to increase revenues and reduce management costs

Washington State, upon joining the union, received grants of land from the federal government to be held in trust and managed to benefit specific beneficiaries, such as common schools, universities, institutions, etc.

The Common School trust is by far the largest trust managed by the Department of Natural Resources (DNR). Funds from school trust lands originally were dedicated to provide revenues statewide for kindergarten through high school education. In the 1960s a state constitutional amendment created the Common School Construction Account and directed the revenues from school trust lands to be deposited into this account.

The state agency responsible for K-12 education, the Office of Superintendent of Public Instruction, manages a grant program that matches funds for eligible school districts for school renovation and new construction. School construction account funds are directed solely toward this grant program.

DNR manages school and other trust properties, generating revenue through sales of timber, forest products and leases for agricultural lands, commercial real estate and other means. By far, timber is the largest source of revenue. DNR receives up to a fourth of the revenues to pay staff salaries and other management costs.

In addition to revenues from school trust lands, the legislature must appropriate additional dedicated revenue sources for the school construction program, as well as appropriate nearly 50 percent of general tax revenues for the state's education system.

### Reposition land ownerships

Over time it became apparent that many trust properties could not be managed efficiently to generate revenue. Some were more valuable as residential or commercial development or could more effectively be managed by other private or public owners. These properties are targeted for exchange, sale or transfer. The proceeds are used to acquire property that can be better managed to generate revenue.

Some difficult-to-manage properties have unique characteristics and are desirable to protect for public use and other benefits. Lands in this category are:

- Special habitats for endangered species
- Lands with special recreation and social values
- Lands with unique geographic, geologic, aesthetic and social attributes

Such lands cannot be set aside without compensation, so the Trust Land Transfer Program was created and funded by the Legislature. Since 1989 more than \$400 million has been appropriated for acquiring and protecting more than 75,000 acres of selected special trust lands.

The Trust Land Transfer program is funded through general obligation bonds, the debt service of which is paid with designated general fund tax revenues. Funding is authorized

by legislative appropriation. The school trust property is appraised to determine the highest and best use value as though the land and timber were to be sold in the market place. The appropriation compensates the trust for the market value of the property and legislation directs that the property, complete with timber, be transferred to the appropriate agency to be held and managed for its special characteristics.

The state Legislature directs that the timber value be deposited into the school account, in the same manner as a timber sale. However, DNR does not receive a management fee since the appropriation pays all direct costs of the transfer. An amount equal to the land value is deposited into the land replacement account and used to purchase replacement school trust property that can be better managed for future revenues to fund school construction.

Historically, selected properties have a high timber-to-land value ratio of 80-90 percent. So, appropriated funds must be increased only 10-20 percent over normal funding levels to implement the TLT program.

**Trust Land Transfer Program provides several important benefits:**

- Common School Trust disposes of land that is difficult to manage for income production. The disposal provides land replacement revenues (land value) that are dedicated for acquiring replacement trust lands.
- The Common School Construction Account receives immediate revenue (timber value) that is used for school construction state-wide.
- DNR uses the funds (equal to the land value) to acquire replacement land that can be managed for future revenues to fund school construction.
- DNR increases management efficiency by disposing of property with little management revenue potential and acquiring property that generates revenue and is more efficient to manage.
- Trust properties with unique features and uses are protected and managed for current and future public use and enjoyment.

**What are the trade-offs or commitments?**

- The state general fund, or the recipient, must contribute additional funds to acquire the land.
- A public agency must be willing to receive the property and manage it for the dedicated use.

**Do we have a productive capacity expectation for replacement lands?**

The program allows DNR to dispose of isolated properties and reposition them into blocks with other trust lands. The newly acquired lands fall generally into one of three management categories: commercial forest, commercial agricultural or commercial real-estate with active ground lease tenants. They far exceed the transferred lands in productive capability — generating more revenue for the state and increasing management efficiency.

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# Acquisition Inventory Listing

Receiver Name	All Counties	Site Name	Tran Type	Interest Type	Amount	Acres	Closing Date
Fish & Wildlife Dept of State Parks	Asotin	Asotin WLA	Purchase	Fee simple	\$457,000.00	1,636.0300	6/18/2004
State Parks	Kittitas	Iron Horse Easton	Purchase	Fee simple	\$76,000.00	20.0000	3/5/2004
State Parks	Jefferson	Point Hannon	Purchase	Fee simple	\$500,000.00	8.2300	5/29/2002
State Parks	Kittitas	Iron Horse Easton	Purchase	Non-Fee Simp	\$2,500.00	0.5000	9/3/2002
State Parks	Pacific	Leadbetter Point	Purchase	Fee simple	\$850,000.00	92.0000	6/20/2003
State Parks	Snohomish	Forks of the Sky	Purchase	Fee simple	\$144,739.88	29.0000	11/28/1990
		<b>Grand Total</b>			<b>\$2,030,239.88</b>	<b>1,785.76</b>	

Criteria: Data Source - All; Receiver Name - All; Conveyor Name - All; Date Range - All; Transaction Type - All; Interest Type - All; Appropriation Authority - Unanticipated Receipt; Primary Use Type - All; Agency Program - All; Fund Source - All; County - All;

