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Port Susan Incentive Pilot Report and Policy Analysis

December 2014

Prepared for
Snohomish County Marine Resources Committee
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County

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Executive Summary

The Snohomish County Marine Resources Committee (MRC) works to restore and protect the marine shorelines of the County, with a focus on implementing the Port Susan Marine Stewardship Area Conservation Action Plan. As part of this ecosystem recovery effort, there is a desire to reduce shoreline armoring on private and public lands. While current regulations will slow or significantly reduce the installation of new bulkheads, rip rap and other hard armor structures, many existing shoreline protection structures are unlikely to be removed by landowners without incentives.

Through a stakeholder process involving interviews and a workshop, 29 potential shoreline landowner incentives were explored for feasibility and potential success in Snohomish County. Out of that process four incentives were ranked highest as potential approaches:

- Establishing a Beach Management District
- Creating a Shorelines Education and Technical Assistance Program
- Offering Focused Shoreline Grants or Cost-Share Awards to Landowners
- Adding a Shoreline Component to the Conservation District's Program

These four incentives were investigated using case studies from examples from the Puget Sound region and from across the US. All of the incentives have strong potential and have demonstrated successes. Implementation of these incentives, however, would require additional resources, concerted leadership and, in some cases, legislative action.

In the stakeholder review process, participants recommended that a package of incentives be developed. Multiple incentives would meld well together in different combinations to create program that includes three key elements: funding, permitting/technical assistance, and education/demonstration. To be most effective, one entity, potentially the County and the MRC, will need to step forward to lead the effort.

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1. Introduction

Snohomish County is growing rapidly. Currently, the thirteenth-largest county in Washington by area, it has the third-largest population, with over 704,000 residents – 100,000 more than in the year 2000. This number is forecast to increase to 900,000 by 2025, an increase of 50 percent in just 25 years. Past and continuing human actions have radically altered shoreline habitat, disturbing ecological processes and impairing water quality. For example, of the two main estuaries, more than 80% of the Snohomish and 85% of the Stillaguamish estuaries are diked, cutting off tidal marshes and blind tidal channels. The area has witnessed decreases in resident and migratory fish, clam, and shorebird populations, increased concentrations of toxics in marine mammals, increased stormwater contamination, and habitat loss and modification, among other concerns (PSP, 2014).

The Snohomish County Marine Resources Committee (MRC) works to restore and protect the marine resources of the County, with a focus on implementing the Port Susan Marine Stewardship Area (PSMSA) Conservation Action Plan. The establishment of the PSMSA is a near-term action (SNST14) in the Puget Sound Partnership’s Action Agenda and directly addresses the strategy to protect the marine nearshore and estuaries through plans, regulations and policies (PSP, 2014). In addition, estuaries and nearshore habitat are one of six limiting factors in the Stilly Salmon Recovery plan and creation of the PSMSA addresses a critical need for salmon recovery.

As part of this ecosystem recovery effort, there is a desire to reduce shoreline armoring on private and public lands. While current regulations – specifically, the Snohomish County Shoreline Master Program (SMP)--will slow or significantly reduce the installation of new bulkheads, rip rap and other hard armor structures, many existing shoreline protection structures are unlikely to be removed by landowners without incentives. The vast majority of shoreline parcels with armor in Snohomish County, other than the areas with railroad lines, are in single family residence use. In addition, intact shoreline habitat may require incentives for landowners to deter the building of additional or new structures.

This study examined potential incentives for shoreline single family property owners, with the intent of identifying two to three highly feasible incentives to carry forward into a pilot phase. Through a stakeholder and research process an initial list of 29 incentives were examined and then winnowed down to four incentives :

- Establishing a Beach Management District
- Creating a Shorelines Education and Technical Assistance Program
- Offering Focused Shoreline Grants or Cost-Share Awards to Landowners
- Adding a Shoreline Component to the Conservation District’s Program

These four incentives are discussed in this report (including examples from other locations and potential opportunities and challenges) and recommendations are presented in the final section for moving forward with potential pilot projects.

Process

Key Informant Interviews

Based on a recent report by Futurewise that included 29 potential shorelines incentives (Futurewise, 2014), interviews were conducted with 16 key informants who work in Snohomish County. The goal of the interviews was to narrow the list down to 10 incentives for further consideration in a workshop. A summary of the interviews is shown in Appendix 1 and the results are discussed below.

Workshop

On July 2, 2014, key informants and additional stakeholders participated in a workshop in which the 10 short-listed incentives were presented along with additional information about shoreline property owners in the County. Following a discussion, participants were asked to rank the incentives in order of anticipated feasibility and effectiveness to narrow the list down to four that could be further analyzed. A summary of the workshop is shown in Appendix 2.

Follow-Up Research, Interviews and Recommendation Development

After the workshop, additional research and interviews were conducted to determine best practices from other areas of the US, Puget Sound and Snohomish County. Lessons learned and opportunities were explored. Analysis and recommendations were developed based on this research, as well as information from the first two phases of the project.

Snohomish Shoreline Property Owners

In Snohomish County, there are approximately 1,675 residential parcels along the marine shoreline, of these 1,316 are owned by individuals. 65% (1,088) of these parcels are currently armored. Of mapped forage fish spawning areas along the County's shorelines, 58% of parcels are armored, mirroring the trend in Puget Sound.

The best opportunity in Snohomish County for armor removal and/or replacement with soft shore protection are the parcels where erosion risk is low to moderate, homes are present, and armor is present. This represents 14.7 miles of the shoreline. An additional 7.7 miles has parcels with homes in low erosion conditions and with no armor. It is desirable to encourage these landowners to refrain from installing armor.

There is a higher percentage of parcels with homes that are owner occupied (61%) in Snohomish than Puget Sound overall (46%). There is a lower percentage of parcels

with owned by persons living outside the county (22%) than Puget Sound overall (39). The age of owners is highest in the 60-69 year old cohort, followed by the 70-79 year old cohort. 31% of owners in Snohomish are under the age of 60, which is among the highest percentage in Puget Sound. Shoreline property owners are highly active voters. 95% of current voters in of Snohomish County parcel owners voted in at least one election (general, primary or special election) a one-year period (Nov 2012-Oct 2013), a higher percentage than in King County and the State.

Most of the shoreline parcels in the County have a total value \$400-700K (land and improvements). Snohomish County has a large percentage (76%) of smaller parcels (≤ 1 acre) than all Puget Sound Counties except Whatcom County. Size of parcel is significant in Puget Sound because smaller parcels with homes (< 1 acre) are more likely to have armor; larger parcels with homes are less likely. In Snohomish county, parcels smaller than 2 acres are more likely to have armor.

In summary, Snohomish County marine shoreline parcels and parcel owners have these characteristics:

- 1,675 parcels (residential category)
- 65% of parcels are armored
 - 14.7 miles = armored: home/low-mod erosion
 - 7.1 miles = unarmored: home/low-mod -high erosion
- 21% have forage fish spawning (58% of those are armored)
- 61% owner occupied
- 22% owners live outside county
- 31% are < 60 years old (owner occupied parcels)
- 95% current voters active
- 60% have value of land/improvements in \$100-700K range
- 76% parcels less than or equal to 1 acre in size (46% < 5 acres)
- If have home, more likely to have armor if ≤ 2 acres (WDFW, 2014).

Barriers and Motivators for Shoreline Landowners

In the key informant interviews, respondents were asked to list the key barriers that they think would apply to marine shoreline residential landowners regarding removal, replacement or avoidance of shoreline armor. Based on their experience working with shoreline landowners in the County, they identified the following barriers:

- Cost
- Don't want to be told what to do
- Unaware of alternatives to armor
- Unaware of why alternatives are needed
- Trust bulkheads (and bulkhead is already there)
- "We have always done it this way, why do we need to change anything?"
- First contact is usually with contractors
- Aesthetics (homeowners like a certain look)
- Permitting (time and cost)

These barriers are reflective of barriers that were identified in a recent Puget Sound-wide social marketing study in which shoreline property owners were surveyed. Results showed that the top barriers for landowners related to removing armor are:

- Concerned property would not be protected (61%)
- Expense (54%)
- Regulations and permitting making process difficult (28%)

The top motivators for removing armor are:

- Being confident the property would be protected or enhanced by removal (60%)
- Getting a tax break or reduced fees (28%)
- Getting a loan or grant (25%)
- Streamlined permitting and processes (21%)
- Providing healthy habitat for fish and wildlife (16%) (WDFW, 2014).

Potential Incentives

To address shoreline landowner barriers regarding voluntary armor removal and/or installation of soft shore protection, a package of incentives will be needed, likely a blend of monetary and non-monetary strategies. Key informants identified the following incentives out of the list of 29 potential incentives as those that showed the most promise in the County based on current financial and cultural conditions:

- Conservation District
- Beach Management District
- Public Benefit Rating System (PBRS)
- Tax Reduction for Restoration Improvements
- Offering Local Award Funding
- Lower Interest Loans
- Technical Assistance/Education
- Certification/Recognition/Award
- Permit Process Streamlining

The remaining 19 incentives were of less interest because they were not a good fit for the county's shorelines (i.e., rolling easements are not as applicable in lower energy shoreline environments), they couldn't be accomplished in a 1-2 year time frame (i.e., passing legislation for a federal tax credit), they were deemed to be better prioritized for larger restoration projects (i.e., Conservation Futures Tax), or county general funds are limited (i.e., direct funding).

At the workshop, the nine incentives (education and technical assistance were combined into one category) were discussed. A brief summary of each are presented below:

Conservation District

Expanding the Snohomish Conservation District's programming to include shoreline technical assistance would be a way to provide assistance to landowners using a well-trusted organization. The Conservation District currently does not have a shorelines technical assistance program, but they would be interested in starting one if funding were available, most likely by having a larger assessment rate (raising the current assessment rate from \$5 to \$6 per parcel per year would fund the program) on eligible parcels in the district. Such a program is in line with the kind of assistance they provide for landowners currently, primarily related to agricultural best practices. The conservation district has a strong positive reputation and is viewed as friendly because of their non-regulatory role.

Beach Management District

Beach management (or protection) districts are special purpose districts covering targeted areas (much smaller than conservation districts) that are tightly constrained to missions associated with the function of managing specific sections of beach. Beach management (or protection) districts do not currently exist in Puget Sound but were considered by stakeholders to be a strong option because establishing such a district would have a good nexus to potential tax payers in that it would apply to their own properties and interests. On the other hand, a new district could be perceived as punitive (a new tax), would be a further form of fractionation of county management and would require staffing.

Public Benefit Rating System (PBRs)

A Public Benefit Rating System (PBRs) is a current use taxation program that offers an incentive (a property tax reduction) to landowners to voluntarily preserve open space. Establishing a PBRs which incentivizes shoreline restoration would be appealing to real estate brokers who want to find additional financial incentives to promote properties. It would be necessary, however, to develop criteria so that removal of armor would provide enough financial benefit. There is some interest in starting a program in order to gather data as to how well this kind of incentive would work in Puget Sound. Another challenge is the shift of tax burden to others within the same tax district.

Tax Reduction for Restoration Improvement

While a tax reduction focused on shoreline restoration might be appealing to landowners, this specific incentive might not provide much financial benefit because the shoreline parcels are small and the tax relief to some might take away from other critical public needs.

Offering Local Shoreline Grants or Cost-Share Award Funding

Targeted small shoreline restoration awards, as cost-share or grants to landowners, follows existing models in the County (Clean Water District

Discretionary Fund). There is uncertainty, though, as to the amount of funding needed to make it a strong enough incentive for individual landowners. An advantage is that a program could have tiered funding that could increase so that larger incentives are provided if neighbors work together. The program would need to be capitalized.

Lower Interest Loans

Existing lower interest loan models to incentivize rehabilitation of historic buildings, replacement of septic systems and installation of energy conservation solutions show that a similar lower interest loan incentivizing shoreline restoration has strong potential. Once established, the program would have a relatively low cost to the County. Challenges are how to address the uncertainty of obtaining permits and the potential lower motivation factor (landowners don't have to remove armor but they do need to replace failing septic systems).

Technical Assistance/Education

Education and technical assistance were deemed by workshop participants to be important as part of any incentive package. Landowners appear to be receptive to finding out what to do and learning more about options, so that they can make informed decisions. Education opens the door so that technical assistance can follow. This incentive fulfills a critical role for government (providing education and technical assistance related to regulatory function). Education and assistance needs to be strategically considered so that specific outcomes can be quantified and efforts are not duplicated.

Recognition/Award/Certification Programs

A recognition, award or certification program related to shoreline restoration has existing Snohomish County models (LakeWise, Sound Horsekeeping Program) and can help send a positive message to neighbors as a broad education tool. Alone, though, these types of programs were not viewed as decision-changers for people.

Permit Process Streamlining/Waiving Fees

Waiving permit fees was viewed by workshop participants as unsustainable in these economic times by workshop participants. Pre-approving a set of standard plans, however, would be a way to gain a type of permit streamlining that could be potentially accomplished.

While most of the above incentives have potential in Snohomish County, the workshop participants were able to agree on four top choices:

- Establishing a Beach Management District
- Creating a Shorelines Education and Technical Assistance Program

- Offering Focused Shoreline Grants or Cost-Share Awards to Landowners
- Adding a Shoreline Component to Conservation District's Program

Participants stressed that an incentives package should be developed. For example, funding alone would not be effective because it would likely be a relatively small percentage of the total cost of armor removal. Technical assistance can't function alone because it would need to be combined with financial motivators.

Following a description of MRC programs in chapter 2, each of these four potential incentives is discussed in more detail in chapters 3-6.

2. Snohomish County Marine Resources Program

The Snohomish County Marine Resources Advisory Committee (MRC) is a citizen-based volunteer committee appointed by the Snohomish County Council. It is one of seven county-based MRCs, which conduct restoration, conservation, and education projects with diverse partners and community members to meet performance benchmarks. These efforts are coordinated and guided by the Northwest Straits Commission, a federally-funded organization dedicated to protecting the Northwest Straits region of the Salish Sea.

Background

The MRC was established in 1999 by the Snohomish County Council to address growing concerns over management and degradation of the Northwest Straits marine areas. Composed of up to 13 citizen volunteers representing economic, recreational, and environmental interests along with local and tribal governments, the MRC's role is to develop local solutions to regional problems and, guided by science and the needs of the marine ecosystem, to advise county officials on courses of remedial or preventive action.

In addition to its responsibilities to the Snohomish County Council and the Executive, the MRC is part of the Northwest Straits Initiative (NWSI), which was created in 1998 by the U.S. Congress, on the recommendation of the Murray-Metcalf Commission, to provide a bottom-up, citizen-driven forum for addressing local marine resource issues. The NWSI, in turn, assisted the seven counties bordering Puget Sound's northern regions in forming their MRCs and continues to provide funding and administrative support. The NWSI/MRC model of scientific analysis and grass roots consensus-building produces cost-effective strategies for protecting and restoring the marine resources of the Northwest Straits.

The MRC's strength lies in its public-private partnerships, which was designed to place decision-making responsibility in the hands of local citizens. Committee members are selected not only for their experience and knowledge, but also for their ability to act as representatives of their communities. By building consensus through education and collaboration, the MRC increases the sustainability of its actions and multiplies the effects of its contributions to the long-term health of Puget Sound.

In addition to the NWSI, other partner organizations include the Washington Departments of Fish and Wildlife, Natural Resources, and Ecology; the Puget Sound Partnership; the Washington State University Extension Beach Watchers, local tribes; neighboring-county MRCs; the Washington and the Veterans Conservation Corps; and non-profit organizations.

MRC Vision and Mission

The Snohomish County MRC "employs an open, collaborative, community-driven

approach to find lasting solutions to marine-related issues, ensuring that our waters and shorelines are clean and that their living inhabitants are sustained for their inherent value, and for the use and pleasure of our fellow citizens.” In their work, they are committed to:

- “Fostering a healthy marine environment for people and wildlife
- Actively involving our communities and partners
- Remaining abreast of changing circumstances, and gathering and applying the most up-to-date scientific information
- Implementing innovative problem-solving techniques
- Maintaining the highest ethical standards.”

An Evolving MRC program

Over the last five years, the role and accomplishments of the Snohomish County MRC have undergone a paradigm shift. The outreach and education efforts, typical of a Marine Resources Committees throughout the Sound, have had tremendous success. Two of the projects, namely the Crabber Education Project and the Mussel Watch program have been so successful that they have been adopted, funded, and expanded throughout the Puget Sound by Washington Department of Fish and Wildlife (WDFW) and National Oceanic and Atmospheric Administration (NOAA), respectively. Additionally the MRC has led the development of the Port Susan Marine Stewardship Area (PSMSA) which resulted in funding for this project. Additionally, several partner agencies have received grants and partnered on collaborative projects to protect and improve the ecosystem in Port Susan. Implementation of the Port Susan Conservation Action Plan is also a priority of the Stillaguamish/Snohomish Local Integrating Organization and is also a near term action on the Puget Sound Partnership (PSP) Action Agenda (PSP, 2012, SNST14). The Port Susan CAP supports the Stillaguamish Salmon Recovery Plan as Estuaries and Nearshore Habitat are one of six limiting factors for salmon recovery in this watershed.

During the 2014 MRC Retreat, members brainstormed a list of projects, which are now underway. The committee members stated during the retreat that they would be interested in requesting additional dedicated program staff member(s). Additional staff capacity could potentially be focused on technical assistance for landowners.

In addition, the MRC has expanded beyond outreach and education to development of large marine capital projects. The work underway at the four nearshore sites between Mukilteo and Everett and at Howarth Park and at Meadowdale Beach Park demonstrates that the MRC staff and members have the ability and leadership to uniquely contribute to restoring the nearshore environment in a manner that will have long-term impacts. During the retreat, many members expressed the wish to continue and grow these capital restoration efforts, which would require expanded staffing.

If the staffing capacity is increased, the Snohomish County Marine Resources Program would be able to more effectively tackle new issues such as shoreline armoring prevention and soft shore protection education, technical assistance and implementation as well as derelict vessel prioritization and removal.

3. Establishing a Beach Management District

Beach management districts are special purpose districts funded by local taxes or fees to protect beaches. While there are no existing beach management districts in Washington State, the concept is similar to lake management districts which are numerous. Lake management districts primarily focus on water quality and invasive species control.

Beach management districts provide a source of funding that can be used for a variety of protection and restoration activities, including provision of small grants to landowners for armor removal. Districts also provide a way to build community awareness and support for shoreline-related restoration activities.

Washington State Statutory Authority for Beach Protection Districts

Beach Protection Districts are allowed under current laws in Washington State. Under RCW 35.21.403, “Any city or town may establish lake or beach management district within its boundaries.” Under RCW 36.61.020:

“Any county may create lake or beach management districts to finance: (a) The improvement and maintenance of lakes or beaches located within or partially within the boundaries of the county; and (b) the acquisition of real property or property rights within or outside a lake or beach management district...”

Further, districts may include funding mechanisms such as special assessment, rates or charges to pay for a variety of activities:

“Special assessments or rates and charges may be imposed on the property included within a lake or beach management district to finance lake or beach improvement and maintenance activities, including:

- (a) Controlling or removing aquatic plants and vegetation;
- (b) Improving water quality;
- (c) Controlling water levels;
- (d) Treating and diverting storm water;
- (e) Controlling agricultural waste;
- (f) Studying lake or marine water quality problems and solutions;
- (g) Cleaning and maintaining ditches and streams entering the lake or marine waters or leaving the lake;
- (h) Monitoring air quality;
- (i) The acquisition of real property and property rights; and
- (j) The related administrative, engineering, legal, and operational costs, including the costs of creating the lake or beach management district.”

RCWs fully support the formation of a Beach Management Districts. The activities currently authorized, however, do not explicitly include direct restoration such as

armor removal. A legislative change may be needed so that armor removal and other restoration activities are allowed.

Funding Beach Management District Activities

Assessments or fees and charges may be used to fund district work (RCW 36.61.020), including the issuance of bonds to be paid by future revenue. Assessments are established in the same manner as through a local improvement district. Amounts can be calculated based on a number of different factors that fairly reflect benefit to the property - for example, water frontage, acreage, and extent of improvements.

Specific funding limits are not apparent in the legislation, other than general limits that apply to all levies and charges. Consequently, local residents can set their own charges. Examples of annual fees for lake management districts in Washington State (Futurewise, 2014) include:

District	Annual Fee		
	Lakefront	Upland lots with lake access	Other lots in the lakeshed
Lake Lawrence District in Thurston County	\$261	\$65	none
Long Lake District in Thurston County	Rate based on water frontage rate, a dwelling unit rate, and vacant land rate		none
Lake Sutherland District in Clallam County	\$50		
Deer Lake District in Stevens County	\$40.50	\$20.25	
Barnes Lake District in Tumwater, WA	\$240	Variable rates	
Beaver Lake District in Sammamish, WA	\$230	\$23	
Lake Ketchum in Snohomish County, WA <i>(While not a lake management district, this provides a Snohomish County example. Water quality work at the lake provided by the County is funded by a special service charge.)</i>	\$150	\$30 (upland owners who are part of two community beaches)	

Beach Protection Districts Elsewhere in the United States

We conducted online research and called state and local jurisdictions across the country to find examples of existing beach protection districts. In this search, we contacted a total of over 80 counties in North Carolina, South Carolina, New Jersey, California,

Wisconsin, Illinois, and Florida to inquire about beach protection districts or taxes. The vast majority of respondents did not know of a beach protection tax or district in their jurisdiction, but we did find some similar types of districts or programs.

Examples described below as case studies:

- **Jupiter Island Beach Protection District, Florida**
- **Captiva Erosion Prevention District, Florida**
- **Jupiter Inlet District, Florida**

Other examples:

- **Surfside Colony Storm Water Protection District.** (<http://www.surfsideswp.org>)
- **Fire Island - Dunewood Erosion Control District, New York.**
- **Hillsboro Inlet District, Florida.** (<http://opaltowerscondo.com/modules.php?name=Documents&doc=Doc76.pdf>)
- **Sebastian Inlet District, Florida** (<http://www.sitd.us>)
- **Monmouth County, New Jersey.** The Tax Administrator specified that the coastal municipalities are responsible for the maintenance of their respective beaches across New Jersey, with no direct county or state tax collection or funding. Each municipality therefore raises the necessary funds through local property taxation, beach badge fees, and in some cases, parking fees. (Mike Imbriaco, Assessor, personal communication).
- **Carteret County, South Carolina.** Staff from Carteret County, South Carolina specified that some of the towns in the county have a per person sand tax, which is used to pay for dredged sand to be brought in for beach nourishment (Suzanne Guthrie, Listing and Billing Supervisor, personal communication).
- **St. Lucie County, Florida.** In St. Lucie County, Florida, there are several special districts whose work overlaps with shoreline protection. The South Hutchinson Island Beach and Dune Restoration Special Assessment District (SAD) is a non-ad valorem district providing special benefit to about 5,000 parcels fronting on the ocean (mostly condominiums). The improvements include a one-time beach and dune restoration project, and the funding comes from the SAD, the County, and a State grant. Additionally, there is a countywide ad valorem taxing district called Erosion District E. (Barbara Guettler, MSBU Project Manager, personal communication).
- **Martin County, Florida.** In Martin County, Florida, a portion of the funding for beach projects comes from an assessment on barrier island property owners. The balance comes from ad valorem taxes (Pamela Knott, Administrative Specialist II, personal communication).
- **Palm Beach County, Florida.** Palm Beach County, Florida has a Greater Boca Beach and Park District, which levies a tax on the county tax roll (Dino Maniotis, Tax Roll Coordinator, personal communication).

- **City of Hillsboro Beach.** The City of Hillsboro Beach, in Broward County, Florida, has a Beach Renourishment non-advalorem fee. The assessment is based on equivalent residential unit which is determined by front footage (Holly Cimino, Director of Finance, Budget and Tax Roll, personal communication).
- **Charlotte County, Florida.** In Charlotte County, Florida, there is a special assessment district called “The Stump Pass Beach Renourishment District,” which is designed for periodic dredging of Stump Pass and placing the recovered sand on the beaches of Manasota Key and Palm and Knight Islands (Paul Polk, Property Appraiser, personal communication).
- **Sarasota County, Florida.** In Sarasota County, Florida, a portion of the Sarasota County Tourist Development Tax is used for Beach Maintenance/Renourishment purposes. The tax is paid by visitors who rent/lease living accommodations (hotels or condos) for six months or less. (Doreen Buonpastore, Fiscal Consultant, and Liz Klaber, Chief Deputy Tax Collector, personal communication).
- **Pinellas County, Florida.** Pinellas County, Florida collects a 5% tourist tax and 8% of these tax funds are allocated for beach nourishment (Janet La Rue, Tax Specialist, personal communication).

Lake Management in Washington

There are a number of lake management districts in Washington, but none in Snohomish County. Lake education and water quality protection work in the county is managed by the County.

Two Puget Sound lake programs/districts are described below as local examples:

- **Lake Ballinger Assessment, Mountlake Terrace, Washington**
- **Barnes Lake Management District, Tumwater, Washington**

Case Study (beach): Jupiter Island Beach Protection District, Florida

In order to learn about the history and operations of the Jupiter Island Beach Protection District, John Duchock, the Beach District Manager for Jupiter Island, was interviewed in July 2014. Mr. Duchock is the first Beach District Manager that Jupiter Island has hired.

Setting and History

The Town of Jupiter Island, Florida has approximately five hundred residences, most of whom are seasonal and therefore more active during the winter months. The town is bordered on the north and south by national and state wildlife refuges, and has low density across most of the town. The Town of Jupiter Island, Florida, has conducted



Photo: JIBPD website

Shoreline in Jupiter Island, Florida

beach nourishment projects (as well as sea turtle monitoring) since the 1970s. Prior to hiring staff in 2013, the District’s projects had been managed by the Town Manager with assistance from consultants.

Authority and Administration

The Beach Protection District in Jupiter Island is a state-registered tax entity (herein referred to as “The District” in this section). The board for the Beach Protection District is the same as the Town Commission – five elected commissioners.

A paid Beach District Manager fills the role of

program manager and gets approval at certain levels through the Town Commission, with some involvement by the Town Manager.

Funding

The District is funded by a set millage per parcel that is evaluated each year. The program is also eligible for state and federal grant funds that help supplement the core program. The primary source for funding, however, is the property tax. Residents are generally supportive of the tax, as the area is a high-income community and the average value of real estate is high. The total budget for 2014 is \$2.8 million (which includes \$1.85 million in reserves for future construction).

Work Projects and Prioritization

The District maintains a 10-year working schedule, focused on large-scale beach nourishment. Every five years, beach nourishment is conducted in order to protect shorelines and buffer against storms. Sand is obtained from offshore sandbars and other permitted offshore areas in which excavation is permitted.

The District conducts interim projects, but the focus is solely in the public arena which is limited to a few access points. No restoration or nourishment work involves private property at this time. The District does, however, facilitate regulatory permits for private individuals, and is working on receiving regulatory authority from the State so that it may do coastal construction regulatory approvals. Incentivizing beach protection on private property is not currently practiced, but this activity is not explicitly prohibited by the District [charter].



Photo: JIBPD website

Shoreline private property

Ecological Issues

The area has a high nesting density for marine sea turtles, so preserving enough shoreline for nesting is a priority for the town/district managers and residents. The Town reports to the State of Florida about the status of the nesting each year. While none of their current grant funding goes towards critical habitat restoration, the District does assist in monitoring the one area designated as a sea turtle refuge. Shoreline development density in the vicinity is low and so there are minimal adverse impacts from human activities.

Communicating with Ratepayers

There is a Beach Protection District meeting every month, which follows the regular Town Commission meeting. It is open to the public. In addition, staff often receives calls from property owners with questions or concerns. Each month the District writes a status update which is published in the town newsletter.

Resident Attitudes

The residents of the Town were described as being environmentally-conscious, so many of the property owners do not need encouragement to voluntarily take natural beach protection measures. Many residents are actively involved in local programs, like mangrove protection.

Challenges and Opportunities

Residents are generally supportive of the District. The only concerns that staff has heard recently were related to shoreline conditions after a large 2012 hurricane when certain areas looked quite eroded. There were some calls and letters, but the number was considered manageable by staff. The low number of calls may have been due to the seasonal nature of most residents.

The level of assessment for properties has not varied greatly. The District does need to hold funds over year-to-year to fund construction, but they maintain a constant tax amount per household by adjusting the millage rate. In 2014, they were able to decrease the millage rate because there was such a large increase in property values and lower projections of budget needs. Construction cost increases, however, have affected the District's budgeting, and managing those costs will continue to be a challenge.

Relationships with adjacent jurisdictions have been generally positive, and given that the sand drifts from north to south and the town is downdrift from a natural reserve, they have not had any problems of sand depletion due to adjacent human activities. The relationship with the county to the south (i.e., downdrift from Jupiter Island) is beneficial and they have worked together on enhancement projects in the past.

Case Study (beach): Captiva Erosion Prevention District, Florida

In order to learn about the history and operations of the Captiva Erosion Prevention District, front desk staff were interviewed on August 7, 2014. Additional information was derived from the District's webpage (www.mycepd.com).

Setting and History

Captiva Island is a barrier island located four miles off the coast of Southwest Florida, just west of Fort Myers, Florida. As is the case with most barrier islands, beach erosion can be a threat to upland development, recreation and environmental interests. The first Captiva Island Project was built in 1961 and consisted of placing 107,000 cubic yards of sand in conjunction with construction of 134 groins. Most of the groins that were constructed have since been removed, buried or destroyed.



Blind Pass in Captiva Reopened After Renourishment

Authority and Administration

The Captiva Erosion Prevention District is an independent special beach and shore preservation district under the provision of chapter 161, Florida Statutes. It is governed by an independently elected district board possessed of broad powers to do as necessary or desirable to carry out the CEPD comprehensive beach and shore preservation program.

Funding

The Captiva Erosion Prevention District Board of Commissioners has the power to levy and assess an ad valorem tax (i.e., tax based on the value of real estate or personal property) not exceeding 10 mills on all taxable property in the District to pay for the maintenance, operation, principal of an interest on any general obligation bonds. The amount of ad valorem taxes used for operations, maintenance, and other corporate purposes cannot exceed 5 mills during any one year. There are 350 full time residents and 1000 parcels in the Captiva District.

Work Projects and Prioritization

The District provides beach erosion control and preservation activities for the protection, preservation and restoration of Captiva's sandy beach. The Board of Commissioners has the authority to develop and execute a logical and suitable program for comprehensive beach and shore preservation. They can authorize construction, reconstruction, or improvements to erosion prevention projects. They can also exercise the power of eminent domain and have authority to enter private property to make surveys, soundings, drillings and other studies.

Ecological Issues

Protection and monitoring of sea turtles, including counting nests and hatchlings, is part of the federal permitting process related to beach nourishment projects. The same stipulations apply for shorebirds. The District must present monitoring data to the government before getting permits.



Public Meeting in Captiva, Florida

Communication with Residents

The Board of Commissioners holds publicly noticed tentative and final budget hearings each year. Prior to the hearings, taxpayers receive The Notice of Proposed Property Taxes known as the TRIM notice. The millage and budget hearings are the best opportunities for taxpayers to provide input into the budget; the hearings are monitored by the Florida Department of Revenue to ensure compliance with the law. The hearings are designed to ensure taxpayers are aware of the proposed millage changes, the proposed budget changes and, if any, the percent of change in the rolled-back rate. Rolled-back rate is defined as the millage rate which provides the same property tax revenue as was levied during the previous year.

The District also communicates with its residents in the following ways: monthly board meetings, monthly community panel meeting presentations, a biannual newsletter, website, and "beach briefings" via email. They also present talks to such groups as Kiwanis and homeowners associations. Before the start of a recent major project, for example, when there was a referendum asking residents' permission to borrow

funds, they conducted extensive outreach and public relations work to ensure that the residents would not be surprised by the assessment. The referendum was on the ballot in the general election and passed with a favorable vote.

Resident Attitudes

The District maintains strong support, perhaps due to the amount of public education they have conducted with residents. If there is an issue or concern, staff are out in the community right away, looking at the site, and letting residents know who they are. Residents are very supportive due to education and seeing the value of the District's projects.

Challenges and Opportunities

As with many smaller government agencies, obtaining funding is the District's biggest challenge, with federal funding being particularly difficult. They are able to do projects through local funding and state funding, with some help from federal funding. A recent project example was funded about a third through the state, over a third through the county tourist tax, and a quarter through assessments of local residents, who had a choice to pay a lump sum of their assessment or have it added as an assessment to their county property tax bill over 7 years. If they chose the longer repayment option, they had to pay interest. Federal funding for projects is minimal.

Case Study (beach): Jupiter Inlet District, Florida

In order to learn about the Jupiter Inlet District, Michael Grella, Executive Director, was interviewed on August 12, 2014. More information was also found at jupiterinletdistrict.org. This example is limited because it only has partial application to a potential beach management district.

Jupiter Inlet District, established in 1921, has a primary goal to dredge an inlet that was cut, and place the sand down drift of the inlet to combat erosion. The District does limited restoration, and any environmental protection generally happens in association with the permitting process with the Army Corps and Florida EPA (in terms of protecting endangered species such as manatees and sea grass). Restoration projects include exotic plant removal and mangrove island enhancement, among others. Public support, however, is low for this type of work and many residents do not support environmental projects beyond the necessary dredging.



Photo: Jupiter Inlet District website

Jupiter Inlet

Funding and Communication

Funding for the District is from ad valorem taxation, and the annual budget is about 2 million dollars. The District distributes money to several organizations to do outreach and education, along with a copy of a Boater's Guide. Additionally, there is a highly popular webcam. Staff posits that the District is the most well-known local government in the County due to the webcam. The District is viewed positively, as residents can see their tax dollars at work, although occasionally owners of specific properties built too close to the inlet complain about lack of adequate quantities of sand.



Photo: Jupiter Inlet District website

The Loxahatchee River

Case Study (lake): Lake Ballinger – An Assessment without a District – Mountlake Terrace, Washington

In order to learn about the management of Lake Ballinger, Mike Shaw, Stormwater Program Manager, was interviewed on August 20, 2014. This lake does not have a district, but rather an assessment rate and management by the City as an agent for the Washington Department of Ecology.

History and Authority

The Lake Ballinger assessment has been in place since 1942. The program was formed by superior court order, after residents came together due to shared frustration at flooding and lake level fluctuation. The program is designed primarily to manage the lake level and is funded by a special assessment of lake residents. The City of Mountlake Terrace now acts as the agent for the Washington State Department of Ecology (the city did not exist at the time of the court order but has since assumed responsibility for projects such as this), and the activities are restricted to giving the budget assessment to the County and operating the weir. The fund was formed under RCW 90.24, "Regulation of Outflow of Lakes."

Funding and Work Projects

The order for the fund was rejudicated in 1981, and the assessments total \$1,500 a year which covers the cost of a crew from the City of Mountlake Terrace to check the weir's functionality and change the lake level about four times per year.

Ecological Issues and Challenges

Lake Ballinger has water quality problems due to increased nutrients. Thus, both water quality and lake level need to be managed. The focus by the City, however, is solely on managing the fluctuating lake levels due to the specific nature of the fund. The water quality problems mean the lake would be well-served by a functioning Lake Management District according to staff; however, at this time such a district is not feasible due to the challenge of having five jurisdictions with authority. The basin has a large population, and the difficult nature of managing nonpoint source pollution means

true water quality improvement would require prevention education and outreach for a large number of residents beyond the adjacent lakeshore property owners.

Communication with Residents

Currently, city staff receive calls with questions about the lake that they feel they are not equipped to answer due to the narrow scope of the assessment directives to address water quantity. There is no central point person or staff member in charge of the assessment and handling public communications, and there are virtually no communications projects underway, given the narrow scope of the current fund.



Lake Ballinger

Resident Attitudes and Potential Opportunities

City staff suggests that forming a municipality around a lake would allow residents to feel ownership within the one jurisdiction and involve residents in projects they prioritize. Potential projects include water quality sampling (as many contaminants are not currently being monitored), education campaigns to prevent further pollutants and the creation of a constructed wetland (to capture nutrients) at an abandoned golf course.

There is a Lake Ballinger/McAleer Creek Watershed Forum with three participating cities, which would be an ideal group to push forward on the formation of a lake management district, if the other municipalities were to also be involved. Resident attitudes would need to be assessed early on, however, to determine if a vote would pass and the projects would be supported.

Case Study (lake): Barnes Lake Management District, City of Tumwater, Washington

In order to learn about the history and operations of the Barnes Lake Management District, Dan Smith, Water Resources Program Manager, was interviewed on August 12, 2014. Additional information was derived from the District's webpage (<http://www.ci.tumwater.wa.us/departments/public-works/utilities/stormwater/barnes-lake-management-district>).

Setting and History

The Tumwater City Council created the Barnes Lake Management District by ordinance in 2004, following the approval of a citizen petition of lake property owners. The goal of the District is to help improve aquatic conditions around the lake. There are 106

properties in the Lake Management District, with about 240 residents. It is a primarily residential area. During formation of the District, the City asked the residents about the history of the lake and this information was used in subsequent planning efforts.

Authority and Administration

The Tumwater City Council appointed a Steering Committee, which serves to advise the Council on planning, project implementation, and the allocation of assessed funds. The Steering Committee includes representatives from each area of the lake so that all residents have a close neighbor on the Committee. A city staff member works with the Steering Committee, and the City then recovers a small fee to compensate for staff resources. The City Council makes final decisions on all project planning. The relationship between the Council and District is supportive and most projects are approved.

Funding

The annual budget for District is about \$17,000 and is based on the projected removal costs of nonnative species and other work priorities for the year. There are three funding tiers for properties:

- Lakefront nonresidential property is charged at the highest tier (although there are few nonresidential properties).
- Lakefront residential property is charged a flat rate at the second-highest tier, assuming it is under a certain linear footage.
- Condos are assessed by view and access at lower tiers. Condos with only a view are charged the lowest rate and those with access as well are charged at the next higher tier.
- The rates are evaluated annually to compare with needs identified in the budget, workplan and goals identified by the Steering Committee.

Work Projects and Prioritization

Work projects for the District have mostly focused on aquatic plant/weed removal and eradication and mat/debris removal, usually through chemical treatment. The District also produces a small number of environmental education materials such as brochures including information on native and nonnative plants, landscaping, and different programs around the state related to lakeside living. In addition, projects can include components of wetland habitat management and preservation, aerial photo assessment, and post-treatment vegetative study.

Staff report that the citizen-led private lake management district can lead to challenges in understanding the need to go through the required permitting process. Therefore, District staff also often provides permitting assistance for lakeside residents.

Ecological Issues

The primary ecological challenge at Barnes Lake is invasive nonnative species. In addition, native emergent plants tend to dominate the lake after removal of those invasive plants, creating a situation in which treatment processes need to address both

the invasive species and the native plants. The lake naturally fills in with sediment and so the lake will need to be continually managed. Another issue is the potential impact on the aquifer from chemicals used to treat the lake.

Communication with Residents

The District distributes a monthly newsletter, maintains a website and sends an email each spring about the annual workplan. Most of the communication is handled by Steering Committee members who maintain close ties with their neighbors. Out of the 106 properties and 240 residents, only about 20 residents attend the annual District meetings (12 attendees are on the Steering Committee). The low turnout may be due to the low number of concerns by residents.



Photo: City of Tumwater website

Barnes Lake

Resident Attitudes

The initial vote to create the District was close, and the support for it remains similarly split today. The annual workplan is created based on resident desires; however, so generally all projects are supported by the majority of residents. Improvement projects include better access, which has strong support from residents. There is still concern, however, about the amount of floating mats and debris. Lakeside property owners are also challenged by the shallowness of the lake.

Challenges and Opportunities

- City staff mentioned that it is important to consider jurisdictional administrative costs when setting the tax rates for lake management districts.
- Lake management projects are adaptive processes which change based on interim results, thus it is important to build in flexibility and preparedness. Citizens might expect linear outcomes from a project, and the District has needed to manage expectations and work to improve education and communication.
- Property turnover leads to numerous questions from new owners. This is why the City maintains the website and other communications.

How to Establish a Beach Management District

In Washington, lake or beach management districts are formed (RCW 36.61) following a process initiated by either a resolution of intent by the county legislators (or a petition by landowners of 15% of the acreage in the proposed district, resulting in a county resolution of intent), a hearing, potential changes by legislators, a determination of

feasibility by legislators, and a vote by residents in the proposed district boundaries. The basic steps are:

1. Initial assessment and strategic plan. Determine need for district and if there is public support to establish a district. The geographic extent of proposed district is determined at this stage, which can as small as one beach area.
2. Initiation of petition. A core group of residents, a nonprofit group, or others spearhead a petition process in order to generate petition signatures from 10 landowners or landowners of at least 15% of the acreage within the proposed district area.
3. County resolution of intent. County legislators adopt a resolution of intent either after a successful petition or indirectly (without a petition).
4. County hearing. The county legislators set a hearing date, and provide notice to all landowners in the proposed district. A hearing must be scheduled at least 30 days and no more than 90 days after the adoption of a resolution, unless an emergency exists. Notice of hearing is to be published at least twice in newspaper of general circulation in the proposed district and mailed to landowners and the Washington Departments of Fish and Wildlife, Natural Resources, and Ecology.
5. County legislators alter proposal (optional). During and after the hearing the legislators may change the proposal, though additional notices or hearings may be needed to do so.
6. County legislators' decision. After the hearing, the legislators consider the feasibility of the district. If they decide favorably, they submit the proposal to the landowners of the proposed district through an election.
7. Authorize election, including specifics. County legislators set date and language for election. Each dollar of proposed charge on a property counts as one vote available to its owner.
8. Public campaign. Undertake a public campaign to get the proposed district approved by voters.
9. Public vote. The election is by mail ballot. Passage of the proposition requires a simple majority of votes cast.
10. Establishment of program. If the vote is favorable, the county adopts an ordinance creating the beach management district. Notice of district's creation must be published within 10 days of adopting the ordinance (RCW 36.61.090 - .100).
11. Subsequent actions. Substantial increases in funding may require another election. Decisions regarding funding must be made during public hearings. The organization and mechanisms for administering funds, including offices and staff is established.

The resolution of intent is an important step. It must include extensive information that describes proposed activities, proposed funds to be raised, duration of the district and funding sources, and boundaries of the district. This information is the basis for

operating and funding the district. Duration of both the life of the district and length of funding may be limited (RCW 36.61.025 and others). Fund charges are directly tied to costs of the activities described in the resolution, and expenditures of more than those described in the resolution are not allowed. Consequently, changing the activities, program duration, or extending funding all requires changes to the resolution of intent, which requires a new election (Futurewise, 2014).

No governance is statutorily specified, however many lake management districts have set up advisory committees.

An Alternative Approach for Funding

In 2002, Snohomish County established a lake management district for Lakes Shoecraft/Goodwin after an extensive public participation process culminating in a vote by the County Council. In 2005, however, the County switched to a special stormwater management fee instead of a district for these lakes. The approach was changed because of the large cost of conducting the public process (about \$35,000) to both establish a district and then to renew the district every five years. Since 2005, the State's statute has been changed to allow districts to be established for longer than five years (i.e., no term limit), but a public process must be conducted anew if there is a desire to increase the rates or to adjust the district purposes.

If an alternative to a beach management district was desired – providing the same service through a special stormwater management fee – the County Council would likely require a thorough public process to establish that there was adequate public support for a special fee. This process could be accomplished by a resident petition or similar neighborhood outreach. This type of process would be less expensive than the process to establish a district because there would be no need for a formal vote and fewer formal public hearings.

Lake or beach management districts would be governed by the County Council. Usually a citizen committee is established as well. Likewise, a citizen committee could also be established for the area covered by a special stormwater fee.

With either a district or a special stormwater management fee, the costs of running the program are about equal. The major cost differential between the two approaches is the start-up costs due to the extensive required public process and vote for districts (Gene Williams, personal communication).

Summary/Analysis

As the above examples demonstrate, there are many advantages to lake or beach management districts including:

- Districts provide a way to secure funding for important projects. These funds can be leveraged with grant and other sources.
- Districts also allow for prioritization of projects.
- A successful district, with strong management and communications with residents, provides a way to bring the community together and to develop a sense of responsibility for the shared waterbody.
- Taxpayers like seeing their dollars at work and a district provides this clear nexus.
- A beach management district is established by a democratic process. Each vote is weighted by how much the landowner for that parcel will pay, and the process involves a number of public hearings and mailings, and a public vote.

Things to consider include:

- Snohomish County already has a number of special districts in place such as the Stillaguamish River Clean Water District described in Chapter 5 and the Conservation District described in Chapter 6. A new district would need to be thoughtfully created so as to ensure that it does not overlap with other districts' responsibilities.
- It would be important to create a clear resolution of intent as well as workplans so that the public can fully understand the purpose and processes of the district.
- The appropriate number of parcels to include as well as how far upland to extend the district boundaries needs to be determined before moving forward. Upland properties, may contribute to water quantify and quality issues.
- There would be costs to the jurisdiction for start-up, administration, and a new public process if rates or purpose need to be adjusted. An alternative approach of using a special stormwater management fee might be more cost-effective.
- Most of the existing management districts (both lake and beach) tend to focus on public benefits (e.g., beach nourishment, lake level, aquatic weed removal, etc.) rather than on private property benefits. They have the authority to work on private property but have tended to work on public projects.
- Legal analysis of the existing statute may not deem armor removal as a qualifying activity. In this case, legislation may be necessary at the state level in order to amend the statute.

Incentive	Establishing a Beach Management District
Efficacy	High: A narrowly focused district can be highly effective in tackling the key needs.
Ease of cost	Medium: Costs for administration by the County depends on the size of the district and the scope of responsibilities.
Administrative feasibility	High: A beach management district is already allowed by statute and similar lake management districts are in place throughout Washington.
Unintended consequences	Medium: A new district could be confusing to residents. There may be overlaps with other districts' responsibilities.
Sustainability	High: If established, a long-term funding source would be secured.
Political feasibility	Medium: A beach management district would likely only be established if there is local support. The County would not act without local support and initiative.
Ease of startup	Low: State legislative action may be needed in order to allow a beach management district to address shoreline armor as part of the responsibilities. In addition, community support would be needed to initiate a district.

Recommendations/Next Steps

- A dedicated effort would be needed to work with residents in the potential district boundary to develop support for a new beach management district.
- Key questions such as district boundaries, interface with existing districts, and rates would need to be given careful consideration. A subcommittee or a dedicated task force could be established to focus on these questions.
- Legislative action may be needed to allow beach districts to address armor removal. A group of interested stakeholders, likely from throughout Puget Sound, would need to be established and supported.

4. Creating a Shorelines Education and Technical Assistance Program

Education and technical assistance are key components of successful shoreline armor removal incentives programs because they raise awareness and reduce barriers for landowner action. Indeed, most of the key influencers indicated that an incentive package must have education and technical assistance incorporated in order to achieve success in armor removal. While there are numerous organizations conducting education and technical assistance in Snohomish County, none are currently focused on armor reduction.

Creating Strong Awareness

Raising awareness about the benefit of armor removal for ecosystem health and about incentives and benefits of armor removal begins with general education programs. A tiered increase in targeted education and technical assistance for receptive landowners can then be implemented. This followed the Pyramid of Engagement model (Figure 1) in which a broader educational approach (bottom of the pyramid) is applied at relatively low cost and more targeted approaches are then ramped up, at higher cost per landowner.

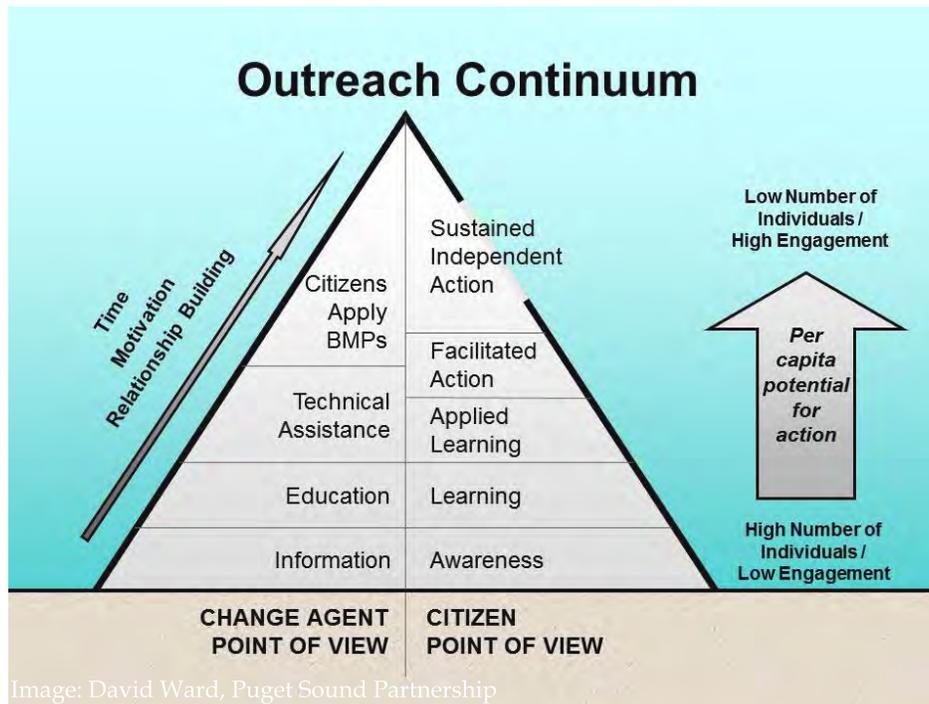


Figure 1. Pyramid of Engagement

The case studies below highlight high quality efforts that are currently underway in the Puget Sound region which demonstrate efforts at different points on the Pyramid of Engagement model. Conservation District technical assistance is not included here because their program is described in Chapter 6.

Case Study: Snohomish County Marine Resources Program/Northwest Straits Foundation Education and Technical Assistance

The Snohomish County Marine Resources Committee (MRC) has partnered with the Northwest Straits Foundation and the Island County MRC to provide technical assistance to Port Susan shoreline landowners. This grant-funded program has been successful and attracted additional funding in September 2014 to continue the effort.

The goal of the project was to reduce shoreline armoring in the Port Susan Marine Stewardship Area (MSA). A MSA is a non-regulatory conservation designation that works to generate responsibility within relevant authorities and users of marine environments for the conservation of natural, cultural, and scenic values.

The project design is based on a similar outreach project in Whatcom County (Coastal Geologic Services, 2011). Project activities include:

- Needs assessment survey of Island and Snohomish County shoreline planners
- Design, implementation, and evaluation of a workshop for Island and Snohomish County shoreline planners
- Needs assessment survey of residential marine shore landowners in the MSA
- Design, implementation, and evaluation of two workshops for landowners in the MSA
- A limited number of free professional site visits for landowners to receive site specific management recommendations from a qualified coastal professional

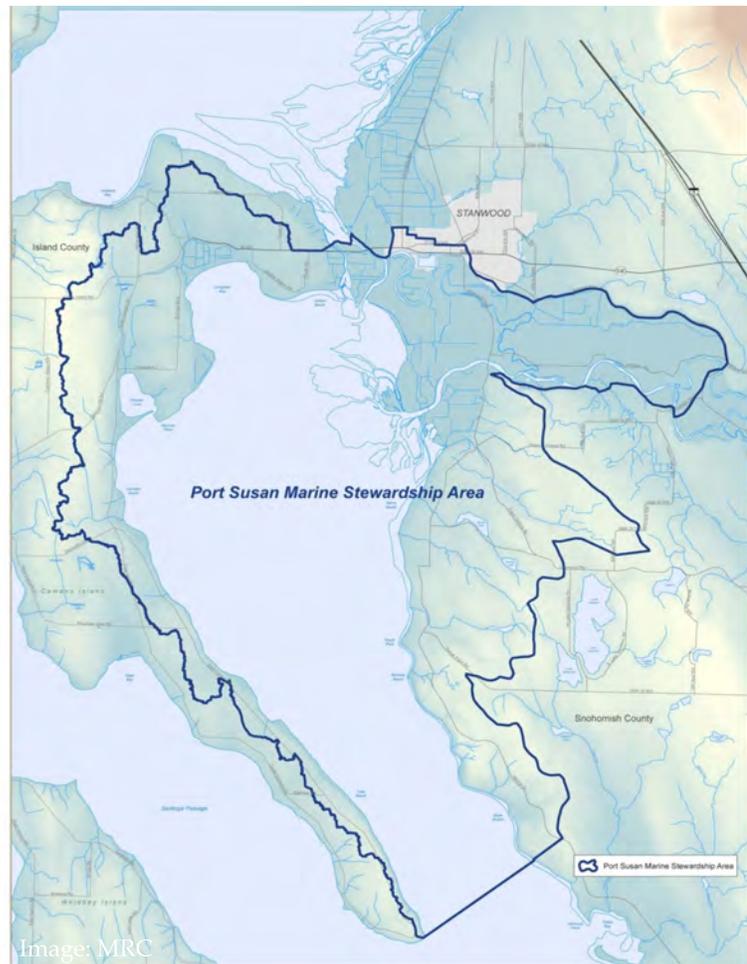


Figure 2: Port Susan Marine Stewardship Area Map

Needs Assessment

Project partners created and conducted pre-workshop needs assessments of target audiences for two workshops (planners and shoreline landowners). This information was used to inform workshop content, materials development and delivery methods, and to provide the basis for recommendations for future outreach activities necessary to achieving project goals.

A needs assessment survey was sent to Island and Snohomish County planners to understand the roles and knowledge of each planner in their office environment. Responses to the survey reflect varying professional experience levels within planning staff (see Figure 2). In the survey, planners identified major barriers to enforcing regulations including lack of understanding of current regulations among landowners, time required to obtain permits, and lack of enforcement for non-permitted activities. Planners hoped to gain a better understanding of coastal processes, shoreline armoring and alternatives, and permitting/regulations through the workshop.

A flyer announcing the workshop and landowner needs assessment survey was mailed to approximately 1,500 marine shoreline landowners in the Port Susan MSA and 53 survey responses were received. Landowners expressed concerns about erosion, polluted runoff and other factors (See Figure 3). They reported that they value the view from their property and also watching wildlife and recreational uses.

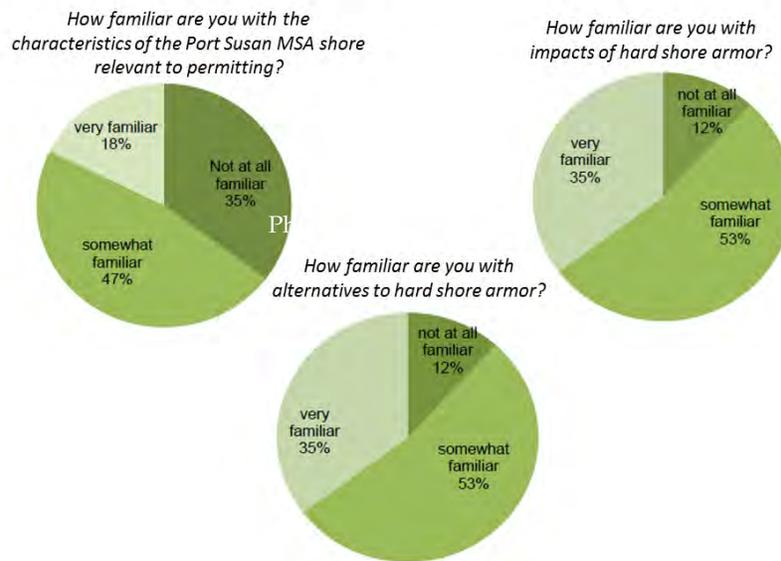


Figure 3. Planner survey "Familiarity" results

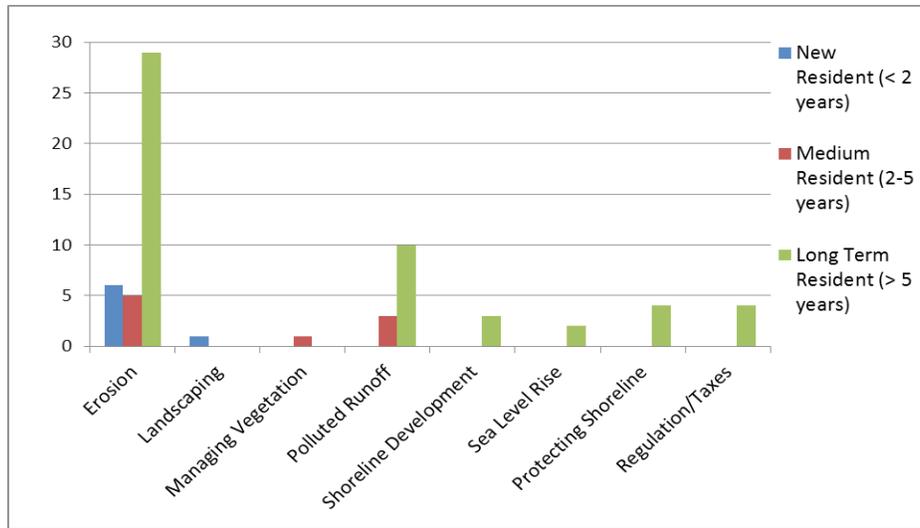


Figure 4. Landowner survey “Concerns” results (“What concerns you most about your coastal property?”)

“This workshop opened my eyes to environmental issues that I never realized. I have always felt and noticed, after being around Port Susan for the last 40 years, that bulkheads made real changes to the beach. It never occurred to me that alternatives existed that could protect ones property.”
 -Workshop participant



Landowner workshops



Photo: MRC

Landowner workshops

Achievements

A workshop for planners held in fall 2012 was attended by 17 participants. As identified in the needs assessment survey, workshop content included an overview of federal, state and county regulations, Puget Sound coastal processes, causes of erosion, impacts of hard armor, best management practices, and specific examples soft shore protection projects implemented in Puget Sound. The content was geared specifically toward Port Susan marine shoreline coastal and geologic processes.

Two landowner workshops in 2012 and 2013 attracted 61 and 51 attendees respectively. The landowner workshops consisted of classroom and field portions led by a coastal processes professional. The goal of the workshops was to increase awareness and knowledge of coastal processes, permitting requirements and alternatives to armor in an interactive community setting. Information for these workshops was tailored to coastal processes and characteristics of the Port Susan marine shoreline. Additionally, soft shore protection case studies and performance (monitoring) data were presented from sites around Puget Sound that focused on landowner concerns expressed in the assessment phase.

Thirty-six site visits were conducted as a result of the workshops and survey. Professional consultants, including a vegetation management specialist and a coastal geologist, were contracted to meet with individual shoreline landowners at their property, discuss their concerns, and provide a brief professional assessment including management recommendations based on both the landowners stated concerns and what was observed at the site. The consultants generated a 1-2 page summary report based on field notes for each visit and this report was sent to the landowner and project staff. Site visits provided to landowners through this program have been less expensive than the King County (see page xx) costs, running about \$500 per site visit.

Landowners who attended workshops and/or received site visits received a follow-up postcard with additional information about the program. In addition, the program conducted evaluation of the events using a survey.

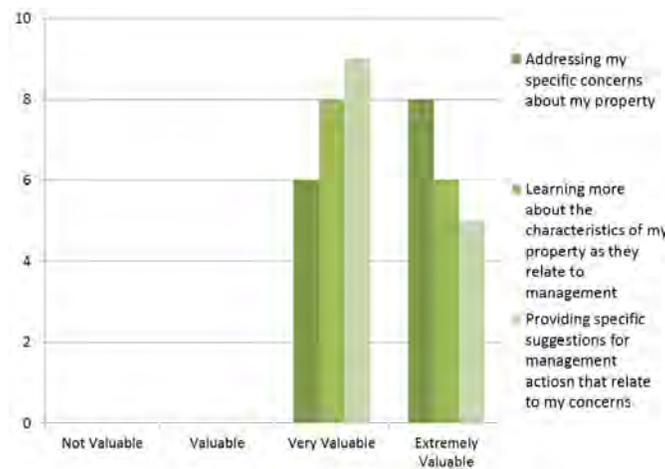


Figure 5: Landowner rating of value of site visit

Protect your investment and your beach.

Explore armoring alternatives

- Keep it natural—this is easiest to maintain and best for your shoreline
- Consider soft shore protection, an engineered solution that mimics a natural beach

Increase native vegetation to stabilize your slope

Set structures back from beach or bluff edges

Start a conversation with your neighbors to prevent bulkheads and beach loss



Port Susan. It's beautiful here. Help keep it that way.

For more information on the Port Susan Marine Stewardship Area and alternatives to shoreline armoring visit www.snocomrc.org

Figure 6: Port Susan Postcard

Evaluation and Evolution of the Program

Planner and landowner post workshop survey results indicate that participants viewed workshop content as both appropriate and useful in increasing the knowledge of both parties on shoreline processes and shore armor. Planners reported increased knowledge about how to evaluate sites for alternatives to hard armor. For landowners, 100% of respondents indicated they would use the information from the workshop to inform management of their property. Landowners reported that learning about shoreline processes and shore hardening impacts were the most valuable aspects of the workshop (Figure 4).

Post-site visit survey results demonstrated that the landowner workshops were an effective mechanism to motivate participating landowners towards taking direct action for implementing best practices for stewardship on their shoreline properties.

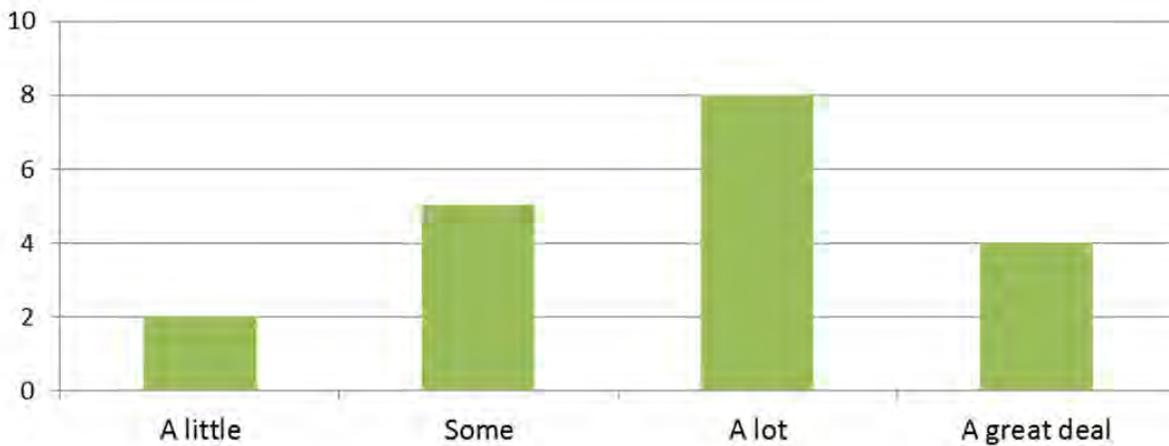


Figure 7. “How much did this workshop increase your knowledge of coastal processes, impacts and alternatives to hardening in the Port Susan MSA?” Responses

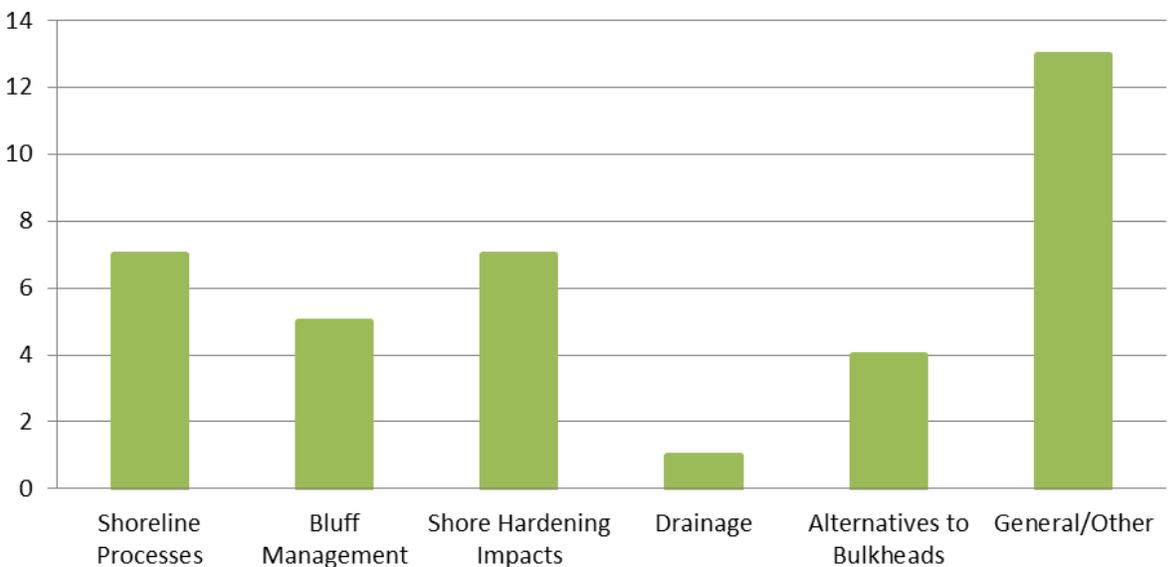


Figure 8. “What was the most valuable aspect of the workshop to you as a marine shoreline landowner?” Responses

Lessons Learned

- There is significant interest among marine shoreline landowners in the Port Susan MSA in participating in educational activities that address their values and concerns. The high level of participation in landowner workshops indicates that opportunities to learn from and interact with professional experts about coastal processes, regulations, management options, and alternatives to armor are valuable to coastal landowners.
- Property owner values and concerns can be used to design effective outreach programs and opportunities.

- Landowner concerns tend to be property specific and are related to perceived risks to properties, such as erosion which was cited by 70% of landowners (from needs assessment).
- The development of incentives for landowners is a desirable element of an outreach program by this audience.

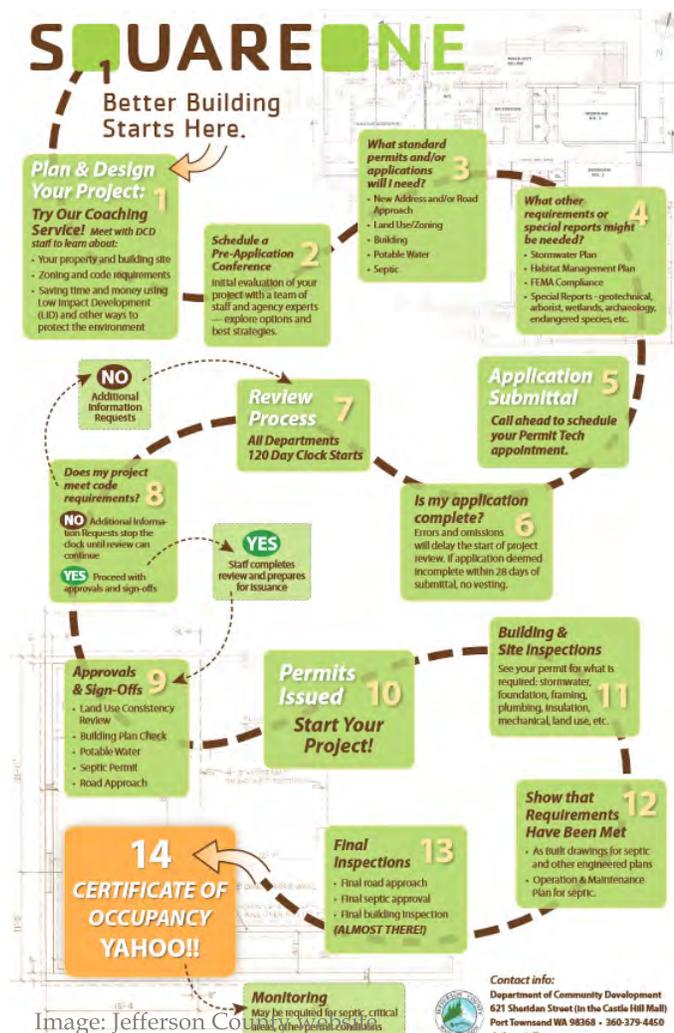
Case Study: SquareOne, Jefferson County

Square One is a program started by Jefferson County to provide friendly and approachable education and permit assistance to landowners early in the permit process to:

- Increase environmentally protective benefits of development projects (i.e. low impact development; buffer enhancement and habitat restoration), and
- Better prepare potential applicants for the permit process so applications are complete at submittal thereby expediting review time.

An initial (October 2011-December 2013) pilot phase of the project was grant-supported and the program has since been maintained by the County with some adjustments.

The key component of the program is “coaching” in which applicants are assisted with site design and “how tos” about the permit process. The early assistance provides a way for staff to incentivize voluntary low impact development to address stormwater, shoreline, and critical areas. This approach is supported by low impact development demonstration sites and extensive educational materials. The coaching and education materials are provided to land owners, developers, builders and realtors at a new one-stop-shop customer service desk. In addition, presentations and workshops are being conducted in the community.



SquareOne Roadmap Infographic

Resource Center and Coaching

The new assistance desk is placed in the lobby of the Department of Community Development so that it will be the first point of contact for people seeking to develop and obtain permits. In coaching sessions (in person, on phone and at sites), prospective applicants learn about requirements and options for developing property in preparation for the permitting process including looking at GIS maps to check their parcel for zoning, critical areas, aerial photography, topographical information, permit and standards requirements and low impact development methods appropriate for their parcel. Low impact development is presented as the cheapest and easiest way to comply with regulations, in most cases. For example, coaches promote retention of native vegetation instead of creating lawns.

Community Presentations

Staff provides presentations about landscaping and low impact development features in community meetings (and in some workshops). Landowners are assured that they can safely come to the County to discuss problems, such as drainage issues, without retribution (which was reportedly a barrier previously).

During the pilot phase of the project, Jefferson County staff dedicated 1,664 hours per year, for a total of 5,824 hours, for coaching services. 2,902 customers received training. They found that coaching is time-intensive for department staff, as many customer inquiries required additional research and follow-up. It was difficult to track success of how landowners decided to change their projects in terms of permits. Many landowners installed or maintained low impact features which would not require permits and thus these were not clearly able to be tracked. Two major development projects in the County were designed to incorporate low impact development; one of the project managers said he was directly influenced by the SquareONE program as he had initially been highly skeptical of the low impact development approach.

Lessons Learned

In their assessment of the pilot, Jefferson County staff listed lessons learned including:

- It is useful to prepare educational handouts early in the process. These handouts have become an invaluable part of the effort.
- It is important to ensure that everyone involved with the program is clear about program goals and what is being promoted.
- Group presentations to the community help raise collective knowledge, spread the word and increase the number of LID promoters. Staff recommends doing more of these presentations than they had initially planned.
- Conducting focus groups early in the process helps guide the program's strategic approach.
- Install demonstration gardens early because these are needed in order to give a visual example. Jefferson County initially had to send people to demonstration sites that were far away.
- One-on-one coaching is highly effective yet extremely time-intensive.

After the grant expired, Jefferson County needed to transition the program. Instead of unlimited free coaching time, potential applicants are given a complimentary 15-minute coaching service after they complete a Customer Assistance Meeting Intake Form that documents their request for staff consultation. Additional coaching time costs applicants a fee. In just the first two months of using the new approach in 2014, staff noted that roughly 50% of the customers receive their answers in those first 15 minutes. Additional service beyond the first 15 minutes became more focused and productive because the customer is financially tied to the staff time. This has provided a revenue stream for the service, has freed up staff time for other work tasks and has reduced the tendency of people to use the time to complain. Public reaction to the fee has “mostly been of understanding and appreciation for our services rather than the negative reaction that was anticipated.”

- Initially the program envisioned using paid greeters, in addition to the coaches, but due to the economic turndown, this was not feasible and instead volunteers were recruited. They were only able to recruit a few volunteers. These volunteers were excellent and helped with many additional aspects of the program, but involved staff time for management and were not available for all shifts. The use of volunteers was discontinued when the program transitioned in 2014 to the new model (Jefferson County, 2014a and 2014b).
- Additional tracking and evaluation methods should be implemented to evaluate the program success moving forward.

Case Study: LakeWise, Snohomish County

The information below is based on an interview with Gene Williams, Snohomish County Lake Program Senior Planner, additional information from Marisa Burghdoff, Water Quality Specialist II, Lakes Surface Water Management and the LakeWise website (www.lakewise.org).

In 2012, Snohomish County started LakeWise as a pilot project in order to address water quality problems, especially excess phosphorus, in County lakes. The goal is to promote stewardship and raise awareness of lake area landowners in order to change behavior related to use of best management practices such as use of fertilizers, pet waste and septic system maintenance. Past outreach efforts that focused primarily on providing information were largely unsuccessful



Landowners with certificate

in creating actual changes in behavior. There were too many barriers and not enough incentives to motivate people to take action, so LakeWise uses a social marketing approach.

History and Start Up

Staff researched successful campaigns across the nation and picked the most promising ideas. Staff then conducted focus groups and market research which showed that a recognition and certification program would be the best option. Lake Howard was selected for the pilot location because it showed increasing trends in phosphorus and algae levels. The lake is fairly small with 38 waterfront homes as well as 68 more in the watershed.



Photo: lakewise.org

Landowner with LakeWise plaque

Workshops

In order to become certified, a landowner must attend both lawn care and septic system care workshops, which are provided by the County and are free. Landowners learn about LakeWise and informational site visits at the workshops.

Certification

Properties can become "LakeWise Certified" if landowners complete all of the items on a "Clear Choices Checklist." The choices on the list have been worked out to be shorter and more meaningful than previous similar checklists for conservation activities. "LakeWise Certified" landowners receive a LakeWise sign to post. If landowners further agree to maintain existing natural shorelines and/or re-establish shoreline vegetation by replacing some lawn with other plants such as shrubs, perennials and trees, landowners qualify for an additional "Healthy Shores" recognition. This extra recognition is shown as a second sign on the posted yard sign.

Site Visits

Landowners can request free site visits to initiate the certification process. A County LakeWise staff person visits homes and provides suggestions for natural lawn care, drainage management, and septic system care while assisting the landowner in going over the checklist. Initially the staff were concerned that there would be a negative reaction to government staff doing the visits but so far it does not appear to be a problem. This may be because all materials emphasize that this is not a regulatory program and visits are voluntary and are not inspections.

Restoration

A limited number of landowners were able to apply for and participate in agreements in which they plant at least 60% of their waterfront to a depth of 10 feet with approved planting designs for five years. The County supplies native plants, installs the plants and does monitoring. Landowners agree to do maintenance, including watering, mulching, and weed control. Staff are helping develop these demonstration sites so that any interested landowner can obtain the designs and other interested people can see that vegetated shorelines can still be attractive and not block views or lake access.



Photo: lakewise.org

Property with LakeWise sign



Photo: lakewise.org

Landowner with LakeWise sign

Success and Evolution of the Program

Since the 2012 start of the program, 133 households have participated in the LakeWise program by either attending a workshop or having a site visit. Fifteen properties are fully LakeWise certified (38 more are in-progress). Nine of 39 shoreline properties have also achieved a healthy shoreline recognition, five of which restored their shorelines following site visits. At Lake Howard, the target lake, 26% of the 108 landowners have either attended a workshop and/or had site visits.

A significant amount of staff time (equivalent to 1/2 FTE) was used to develop the program over a 2-year

period in addition to the costs for conducting surveys and focus groups (~\$11,000) and graphic design work by County staff. In 2013, the first full year of implementing the pilot program, implementation cost was around \$50,000 (mostly staff time). Site visits take about 5 hours including the preparation, travel time, and follow-up report. Workshops cost around \$4,000, which is mostly for mailers and postage. As the program develops and the program components are completed (e.g., brochures, checklists, tracking database, website, shoreline restoration resources, etc.), the amount of staff administrative and planning time is decreasing.

Staff conducted preliminary program evaluation based on participation rates and feedback provided during site visits. Additional evaluation is planned in 2014, including landowner interviews by a consultant to better understand what is working best and the remaining participation barriers. The program will be adapted and launched at a set of new target lakes.

Lessons Learned

- It has been beneficial to be working primarily in a defined community, not widespread throughout the County. This has allowed the program to build community support and capitalize on neighbor-to-neighbor communication and recognition (seeing signs).
- Certification and recognition does seem to be a strong motivator. Staff were initially unsure if it would work but preliminary results have been good.
- In retrospect, the program should possibly have been more intense with more outreach and public relations in a shorter period. There was a large amount of initial enthusiasm, but because staff were only able to devote limited time to the project and did not have all of the components ready at the start, they were unable to “go big” with the program. Likewise, they decided not to create a sense of urgency (“this offer expires”).
- Landowners really like the checklist format – they can actually check off completed items and see their progress, making remaining items seem more achievable. Learning from failures of programs with long lists of best management practices, it was important to limit the number of desired behavior changes and to present them as clearly as possible.
- Workshops have been really valuable and have been the primary way to generate future participation as well as encourage actions on the checklist.
- The program currently does not include a step to check back with landowners after they achieve certification. They are evaluating if this is needed for future efforts.



LakeWise sign

- Landowners love the signs – although it often takes a while for landowners to display them, which was an unexpected barrier that may be preventing the program from spreading as quickly in a community.
- It seems that once landowners take some of the smaller easier actions they are more likely to complete shoreline restoration actions, particularly if assistance is available.
- A database established early on has been essential to track interested landowners, workshop participation and certification status and provides quick program evaluation.

Case Study: Go Green Natural Yard Care Program, Olympia, Washington

The information below is based on an interview with Patricia Pyle, City of Olympia Water Resources Program and Go Green Yard Care Program website (<http://olympiawa.gov/city-utilities/storm-and-surface-water/education-and-action/go-green-lawncare-prog>).

The City of Olympia has developed and is continuing to evolve an innovative natural yard care program. The critical difference between their program and many other yard care educational and technical assistance programs is a customization of advice for each site. Rather than promoting “one size fits all” best management practices, such as “water 1 inch per week” or “spread compost,” they take soil samples and conduct other assessments of each property and provide individualized lawn coach visits.

History of the Program

In 2013, the City conducted a pilot natural yard care program to reduce pollution associated with lawn fertilizer use. The new program was designed to address specific site conditions for each homeowner, including soil, given different product use histories, pH and other factors. Rather than having government staff provide the information, the project hired landscape professionals to provide individualized lawn care coaching site visits.

Ten homeowners formed the pilot cohort. Each homeowner received three lawn coaching visits: one visit to collect a soil sample and assess site conditions (in the spring), a second visit three weeks later to convey soil test results and provide customized lawn care recommendations, and a third and final visit in the fall to check on progress and reinforce the recommendations. Homeowners purchased their own fertilizer and products.

In late 2013, the City applied for and received more grant funding to do a second larger phase of the program. The program will reach 400 participants in 2 years. Changes were adaptively made to the program including reducing professional coaching visits to two (City staff takes soil samples at each site earlier), providing free fertilizer and

lime, and incorporating small group demonstration workshops. Preliminary evaluation results show favorable opinions of the site visits and changes in lawn care practices.

Cost

Lawn care visits are budgeted at \$100 each which includes initial contact with homeowners, making logistical arrangements, doing the visits, and preparing reports.



Photo: olympiawa.gov

Before natural yard care intervention



Photo: olympiawa.gov

After natural yard care intervention

Lessons Learned

- City staff found that it is important to demonstrate best management practices and provide coaching that is responsive to behaviors at the home, including such specifics as how well they are maintaining their lawn mower and how often fertilizer is applied.
- They also found that workshops alone were not effective. Site visits and other follow-up were needed in order to reinforce what was learned at workshops.
- They determined that it is beneficial to hire third party professionals. This helps reduce the “government” aspect of the advice. There can be challenges, however, in that the professionals provide advice which may not exactly match the desired advice and programming by the City.
- Staff reported that pre- and post- surveys were not always reliable. They addressed this concern by including an evaluation aspect to the lawn coach visits (i.e., to determine if best management practices were being implemented).
- Staff felt that it was important to provide information based on exact science because soil chemistry and other factors need to be prescriptively addressed. This is why they provided lawn coaching rather than general best management advice. Further, they found that many landowners preferred to receive data and information.

- It would be beneficial to vet the messaging but the City hasn't had time to do this while quickly implementing the program to meet grant deadlines. There is a plan to get the current cohort of homeowners to review the recruitment tools to provide suggestions for next year.
- In the pilot, staff realized that people needed a certain level of "handholding," i.e., they needed to be shown how to do things. Thus they incorporated demonstration workshops on mowing, aerating, liming and fertilizers.

Snohomish County Education and Technical Assistance Opportunities

In Snohomish County, a strategic education and technical assistance approach could involve a number of entities collaborating with distinct roles to accomplish specific outcomes. Each entity focusing on their areas of strengths could create a collective synergistic successful program. Other efforts have demonstrated the benefit of partnerships.

Existing entities that are currently doing education and technical assistance to landowners related to natural resource protection are shown in Table 1. Potential roles in an overall shoreline program are identified, based on the strengths of each organization and agency.

Table 1. Existing Education and Technical Assistance Efforts in Snohomish County

Organization or agency	Program approach for landowners	Potential role in a armor reduction program
Snohomish Conservation District	Major focus on individual technical assistance with additional programs that provide education. Permit assistance.	<ul style="list-style-type: none"> • Partner on producing workshops • Onsite technical assistance • Permit assistance • Manage incentives package
Snohomish County Marine Resources Committee (MRC)	Leading the efforts to implement the Port Susan Marine Stewardship Area Conservation Action Plan. Serving as local leader to coordinate a variety of projects.	<ul style="list-style-type: none"> • Lead workshops • Expand County to hire additional staff to provide technical assistance to landowners (similar to LakeWise) • Develop (with County) incentives package • Assist with restoration grant applications for landowners in key shoreline areas

Organization or agency	Program approach for landowners	Potential role in a armor reduction program
Shore Stewards	Currently this program is not active. Program was based on self-certification with general shoreline health education.	<ul style="list-style-type: none"> • Help build community awareness
Beach Watchers	Volunteers receive natural resource and BMP training and in exchange volunteer to do monitoring and other activities	<ul style="list-style-type: none"> • Broad education
Sound Salmon Solutions	Shoreline restoration work, with educational programs.	<ul style="list-style-type: none"> • Shoreline restoration work, with educational programs.
Tulalip Tribes	Lease agreements for residential land. Collaborate on workshops	<ul style="list-style-type: none"> • Potential bulkhead removal project on Mission Beach in Port Susan could highlight benefits for landowners in the area
The Nature Conservancy	Focused on specific habitat restoration projects on private land or with public partners.	<ul style="list-style-type: none"> • Showcase Port Susan Dike Removal Restoration Project as an example
Northwest Straits Foundation	Secure funding. Conduct landowner workshops and broad education (Sound IQ) program.	<ul style="list-style-type: none"> • Partner on landowner workshops (fund coastal experts) • Partner on technical assistance (fund coastal experts)
Snohomish County	Programs to raise awareness to for behavior change. Permit assistance.	<ul style="list-style-type: none"> • Coordinate overall awareness and behavior program • Develop incentives project • Partner on landowner workshops • Streamlined permit assistance

Summary/Analysis

As the above examples demonstrate, there are many positive elements of education and technical assistance programs that should be capitalized on including:

- Workshops get the word out. Attending workshops allows landowners to hear from and begin to trust third party coastal experts. They also learn about site visits.
- One-on-one coaching and technical assistance has proved to be highly successful for motivating landowner action.
- It is beneficial to work within a defined community. Information about the program can spread by word of mouth and neighbors recruit neighbors.

Things to consider include:

- All of the components are needed: broad education, workshops, educational materials, and one-on-one assistance (on-site). For example, workshops need to be paired with follow-up work and support for landowners. Just providing information does not ensure that landowners will act. On the other hand, educational materials are important to include in the overall effort.
- Demonstration is critical. Demonstration sites and demonstrating desired techniques is needed, rather than just telling people about desired features and actions.
- Research has shown that government staff are generally less well received than other entities. Conservation Districts, third party technical professionals, and non-governmental organizations have a strong positive track record in successfully providing education and technical assistance.
- Permit assistance should be included in the overall package.
- Often educational and technical assistance programs do not provide upfront or easy-to-measure outcomes and some items are difficult to track. This issue should be addressed and a major effort made to hone the program to clear outcomes.
- Post-surveys are somewhat unreliable. In order to determine actual success of the program, on-the-ground observations or other means should be incorporated into the program.
- Working with third party coastal professionals is highly beneficial, but consideration should be made about ways to keep the assistance and education “on message.”
- Landowners desire real data and credible advice. General BMP advice may not be effective and in some cases it may not address site conditions accurately.
- One-on-one assistance is highly valuable but is costly.
- Staff innovation and leadership is critical for successful programs. Many of the projects described above (and throughout this report) resulted from staff initiative.

Incentive	Creating a Shorelines Education and Technical Assistance Program
Efficacy	High: A well designed education and technical assistance program with clear outcomes and a strategic approach can be effective.
Ease of cost	Low: Education and technical assistance can be expensive unless properly targeted for the desired outcomes.
Administrative feasibility	High: The existing agencies and organizations in Snohomish County have the potential to conduct this program.
Unintended consequences	Medium: Conducting education and technical assistance about marine shorelines might divert efforts related to other priority concerns.
Sustainability	Low: Because of the high cost of a program, long-term funding (such as funding for the Conservation District) is needed.
Political feasibility	High: The development of shoreline education and technical assistance program builds on existing efforts in the county.
Ease of startup	Medium: In addition to finding funding, an effort would be needed to create a high quality program and work with all of the partners to create a strategic approach.

Recommendations/Next Steps

- Choose one agency to be the lead of the effort, such as Snohomish County which can bring together a variety of partners and agencies.
- To effectively implement an education and technical assistance incentive, it will be important to create a strategic approach upfront that capitalizes on the strengths of the existing organizations, avoids duplication, and has clear and measurable outcomes. Such an effort will likely make it easier to justify funding from potential sources.
- All of the components of a program should be included in order to be effective: broad education, workshops, outreach materials, and one-on-one site-specific technical assistance.
- Evaluation is critical. Many such programs do not meet desired outcomes. Often changes are needed mid-stream. Funding should be dedicated to high quality evaluation throughout the implementation of the program.
- This incentive could be combined with other incentives (e.g., Beach Management District) that provide funding to support the technical assistance.

5. Offering Focused Shoreline Grants or Cost-Share Awards to Landowners

Direct financial incentives, such as providing cost-share awards, could be an effective way to motivate landowners to remove armor or install soft shore protection. A relatively small financial incentive (on the order of \$5,000 per landowner) may be all that is needed, as was found in focus group research for the Armor Social Marketing project (WDFW, 2014).

There are not many examples of small grant or cost-share programs for conservation activities beyond agriculture-based projects. This is possibly because of the need for programs to clearly demonstrate that they avoid gifting public funds. There are some very effective and high quality examples, however, that are achieving program objectives and these are described below.

Case Study: Stillaguamish River Clean Water District Discretionary Fund Grant Program, Snohomish County

The information below is based on an interview with Sean Edwards, Senior Planner, who manages the Discretionary Fund Grant Program for Snohomish County.

The Stillaguamish River Clean Water District (CWD) is a water quality restoration and water quantity management service area administered by Snohomish County through the Surface Water Management (SWM) Division of the Public Works Department. SWM provides these services using fee revenues collected from property owners within the CWD under the authority of RCW 90.72 (shellfish protection districts) and RCW 36.89 (stormwater management). As per Snohomish County Code 25A.20.030(3)(c), a portion of the shellfish protection revenue is allocated exclusively for funding small projects (on private or public property) that help to restore water quality over the shellfish tidelands of Port Susan and South Skagit Bay. These revenues for small water quality restoration projects are administered by SWM through the “Discretionary Fund Grant Program.” The CWD Advisory Board, whose members are appointed by the Snohomish County Council representing CWD ratepayers and various other stakeholders, recommends projects and final approval for Discretionary Fund grants is given by the SWM Director.



Photo: Christopher Krombs

Stillaguamish River

Background and Funding

Revenues for the CWD are collected on real property within the district boundaries with a rate structure based on land use type including single family residential (\$90 per year); condominium unit (\$81); farm (\$0-\$2.07 per ¼ acre); and retail, industrial and other land uses (\$0-\$202.84 per ¼ acre), with some exemptions. 7.9% of the shellfish protection (RCW 90.72) portion of the annual CWD revenues is allocated to the Discretionary Fund Grant Program. In 2014, this totaled about \$34,000.

Prior to 2010, the Discretionary Fund was managed by SWM staff for water quality restoration projects identified and implemented by SWM staff in collaboration with local landowners. For several years starting around 2007, few projects were implemented and, as a result, a fairly large fund balance had built up. In 2011, SWM revamped the Discretionary Fund Grant Program at the request of the Advisory Board, which desired a grant program that was open to everyone within the CWD and that included on-site septic system repair as a grant-eligible project type.

Eligible Projects

The Discretionary Fund Grant Program is designed for relatively quick-to-implement on-the-ground projects that provide shellfish protection benefits in Port Susan or South Skagit Bay by directly improving the quality (bacterial or chemical) of surface or ground water including:

- Reducing fecal coliform contamination caused by failing septic systems, manure, or pet waste;
- Reducing chemical or organic contamination caused by stormwater runoff;
- Reducing groundwater contamination;
- Protecting water bodies from livestock by installing fences, dry crossings, or off-stream watering equipment;
- Installing natural buffers, native plantings, or bioswales that protect water quality and;
- Conducting water-quality education and outreach designed to foster practices or small projects that directly contribute to any of the above.



Stillaguamish River

For most projects, the program provides up to \$15,000 cost-share of the total eligible costs and the applicant must provide at least 25% of the cost. For on-site septic system

repairs, the program provides up to \$10,000 and the property owner must provide at least 50% of the cost. Eligible costs includes labor, materials, supplies, equipment hours, and permit fees; educational materials and their presentation to the public; and for on-site septic systems, construction costs related to installation or repair of design components approved by Snohomish Health District (i.e., tanks, pumps, enhanced treatment units, controls, and drain fields).

Application Process and Determination of Projects

Applications are reviewed quarterly. Staff reviews applications for completeness and eligibility and forwards complete applications to the Advisory Board, which makes funding recommendations to the SWM Director who has final approval authority. The applications are meant to be relatively easy to fill out and the review process streamlined.

Accountability

Approved grantees enter into contracts with SWM. Eligible expenses are reimbursed after final site inspections by SWM staff, which ensures that projects have been completed according to the grant contracts with quality materials and workmanship. For septic system repair projects, the Snohomish Health District also conducts final inspections, preferably with SWM staff, the landowner, and the installer.

Success of the Program

When the revamped program was launched in 2011, applications initially came in slowly. SWM staff conducted targeted outreach to septic system industry professionals (designers, installers, pumpers) through an annual septic system industry workshop hosted by the Snohomish Health District. This worked well because these professionals were able to inform their customers about the Discretionary Fund Grant Program and, in some cases, assist landowners with grant applications. As people saw that the County was serious about providing cost-share grants, word spread about the program. As of the end of 2013, twenty-three projects had been completed; 18 of which were septic system repairs. The remaining projects were a mix of education and outreach efforts and other types of water quality restoration projects. The number of applications has decreased in the first three quarters of 2014.

Almost all applications have been approved. The few that have not been approved were due to lack of significant water quality benefit for shellfish protection or failure of the grantee to obtain all necessary permits as required for all Discretionary Fund grant contracts.

The Advisory Board Members are very pleased with the revamped program. They feel it provides good “bang for the buck” because significant sources of fecal coliform pollution are being removed quickly and economically, especially as a result of the septic repair projects. The education and outreach projects have also helped to raise public awareness about local water quality conditions, sources of bacterial pollution and water quality best management practices.

Adaptive Changes to the Program

A few changes have been made to the program in the past year. The maximum Discretionary Fund grant awards for septic system repairs was reduced from \$15,000 to \$10,000 and the landowner cost-share increased from 50% to 75% because of concerns from the Advisory Board that the fund was being depleted too fast and a belief that landowners would be responsive at a lower price point. However, it is important to note that septic repairs in shoreline areas can cost up to \$30,000 because small lot sizes and other parcel configuration issues often force the Snohomish Health District to require the highest level of sewage treatment offered by relatively expensive aerobic treatment unit (ATU) systems. The 2014 budget for the Discretionary Fund Grant Program was about \$135,000, including approximately \$34,000 from 2014 CWD revenue and the remainder from fund balance. SWM expenses for administration of the Discretionary Fund Grant Program are charged to the Stillaguamish Shellfish Protection Program rather than the grant program.

A new county-wide loan and grant program for septic repairs is being developed by the County using a grant from the Washington Department of Ecology and local matching funds from the CWD and SWM's other two watershed management areas from which fees are collected. As the County develops this new program, the CWD Advisory Board and SWM staff are considering how they might further adapt the Discretionary Fund Grant Program since most of the Discretionary Fund projects have been septic repairs.

Lessons Learned

- Some of the success of the Discretionary Fund Grant Program can likely be attributed to how generous the grants have been.
- If large enough incentives are offered, then people do “come out of the woodwork” that might have had failing septic systems (or other problems) but were not compelled to fix them by the existing regulatory systems in Snohomish County.
- A price point analysis would have been beneficial upfront. It is uncertain whether a lower grant award would be enough to motivate landowners.
- There are concerns about how much money is in the fund balance and the rate at which the fund is being depleted.
- The County is developing a new loan and grant program for septic system repairs, which will only provide grants for low income landowners.
- It worked well to connect directly with septic system industry professionals through collaboration with the Snohomish Health District. Septic industry professionals were motivated by business interests to spread the word about the program. In addition, once the community could see that the County was serious about giving out cost-share grants, confidence was gained about the Discretionary Fund Grant Program and more people were willing to apply.

- It may be a barrier for some people to participate in the program because they have to pay for the project first and then get reimbursed.
- If septic repair projects are no longer eligible, there may be difficulties getting enough landowners to participate in projects to install other best management practices. Technical assistance and outreach are needed to encourage landowners to participate.
- As with any cost share incentive program, it is essential to ensure that public benefits are created from the use of public funds. The County has determined that this program produces significant public benefits in the form of water quality protection and restoration.
- Administrative costs for the program have not yet been quantified. Because the application requirements are fairly minimal and there have not been an overwhelming number of applications, the staff time has not been excessive. Some applications with missing components have required extra staff time because of the need to follow-up with applicants.
- There is a question about long-term maintenance of the projects and septic systems. The Advisory Board wants to make sure that the public investment is maintained. It would be beneficial to determine a process to ensure long-term maintenance.

Case Study: Rain Garden Local Award program, Kitsap County, Washington

The information about the Kitsap Conservation District Rain Garden and LID Program is based on interviews with Mindy Fohn, Water Quality Manager – Clean Water Kitsap Partnership and Teresa Brooks, Kitsap Conservation District, as well as the Kitsapcd.org website.

Overview

The Kitsap Conservation District offers a Rain Garden and Low Impact Development Program to residents of unincorporated Kitsap County. With funding from Kitsap County Surface and Stormwater Management, the program helps landowners protect local water resources by providing information, technical assistance and financial incentives toward the installation and maintenance of rain gardens and other low impact development solutions. The goal of the program is to reduce impacts of stormwater pollution.

The program includes free site visits for landowner to assess and discuss what low impact development projects are feasible for their property, as well as provide free technical assistance and planning for project implementation. The program also provides up to \$1000 (a recent increase, see below) for installation and materials. Low impact development options covered include rain gardens, rain barrels, lawn modification, soakage trenches and native plants.

History

In 2009, the Kitsap Board of Commissioners asked the Public Works Stormwater Division to propose a rain garden program with the goal of installing 1,000 rain gardens in unincorporated Kitsap County. After researching similar projects nationwide and piloting some workshops with master gardeners, staff conducted a landowner survey to find out what strategies would be successful. They found that lack of technical assistance and lack of funding were the major barriers to installation of rain gardens. While the surveyed group was generally environmentally-focused, the County learned that as cost, time and effort required to take action increased, there was more resistance. So in 2010, the Division partnered with the Kitsap Conservation District and Washington State University to create a Rain Garden Cost-Share Program for landowners and small commercial businesses.



An LID project in Kitsap County

Funding

The program is funded by stormwater fees. These fees apply to every residential and commercial property in unincorporated Kitsap County. In 2014, the fee was \$78 for each household. Commercial properties are charged the fee at a rate of \$78 per 1,200 square feet of impervious surface. The fee funds all the stormwater division work in the Public Works department, as well as selected projects such as the Rain Garden Program. The program budget is \$150,000 for 2015, including \$100,000 for staff time and \$50,000 for the cost share.

Projects and Evolution of Process

To date, 134 rain gardens have been installed under the program. The application process is rolling, and projects are funded on a first-come, first-serve basis. Out of 300 site visits per year, generally around 50 move forward to the next phase.

After recognizing that a major barrier was simply getting started, the District started a program called “Digging Days” with money from the stormwater fund. They hired

a contractor with a back hoe, contacted landowners whose projects hadn't started and said, "We have three days open – pick a day, we'll be out there and dig the hole, put the soil mix in, and provide you with plants." This counted as the project's benefit up to \$500, and resulted in immediate increase in participation with many more projects moving forward.

Staff noted that it was important to employ staff who are knowledgeable about technical drainage issues. Initially, most landowners wanted to install rain gardens because of flooding issues or wet areas so the staff needed to be knowledgeable about drainage issues. Thus, the District employed a regional engineer to produce base designs, and then their own landscape architect modified the designs for each site. This has proved to be a more cost-effective method for the program than individual plans.

Accountability

The program includes a 5-year maintenance requirement, and each project upon completion receives a post-construction site visit, plus one visit a year for five years to check on maintenance. This system was already in place for other programs at the District and so it has been easy to implement this accountability component for the program.

It was a strategic move to house the program at the District, according to County staff. The District works with the landowners in a non-regulatory capacity, and this helps with messaging because they can collaboratively work with small farm owners, residential landowners and commercial properties. Additionally, the District already had a cost-share structure in place for their other programs, so the framework could easily be expanded for this work. The District dedicates 2.5 staff to this program.

Evaluation and Adaptive Changes

An evaluation survey was conducted of the first four years of the program implementation to find out if landowners had installed rain gardens, and if

not, why not. Participants were also asked what other best management practices they might be willing to put in if not a rain garden. The results showed that site restrictions were a barrier to installation, and that the cost-share would be more effective if the dollar amount offered was higher. This led to an increase in the cost-share amount



Photo: Kitsap Conservation District website

An LID project in Kitsap County

as well as the addition of new options included in the cost-share program, such as amending soil, installing soakage trenches, planting native plants and installing rain barrels.

Lessons Learned

- County staff recommends finding a small first step that can get people involved and interested with a low investment. Rain barrels have proven to be an immensely successful first step toward bigger projects in their program.
- It is beneficial to use messaging that is demonstrative. County staff indicated that “We don’t talk about what we do, but what the benefits of what we do are.” Conservation District staff recommended using images of ideal examples on materials.
- A targeted approach in individual watersheds, including mailing “Enhance your yard” information packets was highly successful.
- Staff feel that one-on-one interactions are key. Conservation District staff maintain good relationships and ensured successful projects by listening to landowners and following up with them.
- Conservation District staff stayed organized and managed the status of the 400 landowners currently in the system by using a database.
- The program has benefitted from keeping plant palette selections to a minimum. Staff focused on plants that they know will be successful and survive, despite some objection from master gardeners, in order to ensure cost-effectiveness and longevity.
- Staff developed a strong relationship with industry as a key component of the program. They deliver a professional rain garden workshop once a year for those professionals who want to provide the program as a service.

Case Study: Weed Grants, Missoula, Montana

The information below about Missoula County Landowner Grants, Missoula Weed District, is based on an interview with Lindsey Bona-Eggeman, Weed Management Coordinator, as well as <http://www.missoulaeduplace.org>.

History

In the late 1990s, Citizens for a Weed-Free Future, a community group, revamped the Missoula Weed District (MWD) program after an herbicide issue regarding roadsides had caused the demise of the existing weed program. The citizen group organized to redirect the focus from herbicide issues back to plant community issues and restoring the ecosystem. In 2000, the group then framed the existing mill levy towards research, education, grants, and mapping. They were successful, and the ballot measure passed easily.

Funding

Landowners apply for awards up to \$500. Initially the program had about a budget of \$40,000, but it wasn't all expended, so it has been cut back to \$20,000 administered yearly. Generally the MWD awards more than the available \$20,000, but then less than \$20,000 actually gets spent out. The reason is a combination of poor weather conditions, lack of money, discontinued projects and people forgetting to ask for their payment.

Projects

The majority of projects tend to be herbicide-focused in which landowners are seeking cost-share to pay for commercial applicators to treat their land. Staff review applications and make sure that costs are realistic (i.e., they are not being overcharged). The program also funds reseeding and staff checks the proposed seed mixes to see if they are appropriate.

Application Process

Once a year, projects are evaluated by the Weed Board based on the species that they're targeting, location of the property in the county, if they've previously received a grant, and appropriateness of the control. Staff also meets with many landowners and gives input as to their commitment and need.

Project Prioritization

Last year, the MWD received a large number of requests so they rejected some projects and reduced a few projects down in scope. Some landowners keep applying each year, which is acceptable for the program because weed control isn't a one-year project. After 6 or 7 years of grants, however, these projects are often the first to get cut back.



Missoula County Weed District website

Meadow, Missoula County, MT

Accountability

MWD staff do not inspect every project. There are 40 some projects every year, and a few are checked sporadically. Projects are considered completed when receipts for reimbursement are submitted and the applicator has been paid.

Resident Attitudes

Landowners have to do minimal effort to apply for the \$500 award, so the project is viewed positively and people are appreciative. Staff are concerned that the people who most need the funding are not necessarily receiving it. The people who are already planning to control their weeds whether or not they're receiving grant money are most likely to apply. The staff plan to conduct more strategic outreach to people within the county.

Communications

The MWD has done a small amount of outreach over the years. They promote a variety of different programs, so this specific program is a portion of the overall outreach.

Outreach includes PowerPoint presentations, outreach booths, a one-page brochure, a newsletter, a website and a Facebook page. In the spring, a workshop is offered called Healthy Acres, associated with County extension, which includes topics landowners are interested in such as soil amendments, tree pruning and noxious weeds. Attendance has varied in recent years, with about 20-30 people in attendance (down from 60 people in past years).

Adaptive Changes to the Program

In 2009, the policy that allowed money to be carried over for a specific project if it were not finished by the end of the year was ceased due to administrative and accounting concerns.

The application form has also evolved and changed every year due to landowners struggling with the form. Landowners had trouble understanding the cost, the chemical rates, cost per acre, and which chemicals to use. Staff have tried to simplify the application but are still working to ensure adequate information is included.

Lessons Learned

- Staff noted that it is important to be willing to evolve the program based on results from each year.
- Staff recommends being selective with projects and making sure landowners are committed.

Summary/Analysis

As the above examples demonstrate, cash incentives can be effective, including:

- Generous cost-share awards have shown good results in other jurisdictions. These incentives might work especially well to inspire landowners who might have been inclined to take action but have not yet moved forward.
- Working with industry may be an effective avenue for restoration. They are motivated to let landowners know about the program.

Things to consider include:

- Programs may be slow to initiate. Once the program has some successes, and word gets out, applications increase.
- Messaging and outreach is needed to get landowners to take action. Technical assistance is also needed.
- Staff resources are also needed to check if sites are completed.
- A long-term plan is needed to make sure that the public investment at each site is maintained.

- It is important to determine the correct price-point which will motivate landowners but won't deplete the fund too quickly. Early assessment of the price-point is needed in order to maximize effectiveness of the program.
- The amount of money that is carried in balance from year to year needs to be considered as a policy decision.
- A simple and easy application which provides all of the needed information helps make it easier for landowners to apply. Some technical assistance by staff may be necessary to help landowners fill out the form accurately.
- Low-income landowners should be considered.
- Prioritization of projects will be needed if funds are limited.

Incentive	Offering Focused Shoreline Grants or Cost-Share Awards to Landowners
Efficacy	High: If a high enough financial incentive is offered, the program will likely be successful. The challenge is identification of the source of funds and determining the correct price-point.
Ease of cost	Low: Funding source is needed. Administration costs by the County depend on the size of the project (number of awards). Cost also depends on scope of effort (total cost of the awards).
Administrative feasibility	High: A similar model (CWD) is already in place.
Unintended consequences	Medium: There could be concern about providing cost share programs to relatively wealthy shoreline landowners.
Sustainability	Low: The program will depend on funding.
Political feasibility	Medium: If funding is secured (grant), then the program will likely be favorable viewed.
Ease of startup	Low: Existing models are available, but a new program would need to be formulated.

Recommendations/Next Steps

- An effort will be needed to secure funding in order to support local cost-share awards.
- A task force or work group would be beneficial so that details can be worked out for strategic deployment of the grants, including application process, accountability, long-term maintenance, messaging and outreach.
- An important factor to determine is the correct price-point which will be enough of a motivator for landowners to take action but is not too costly to fund with grant or tax dollars. An assessment of this is needed up front.
- Reaching out to the industry (contractors and real estate agencies) for feedback on the program before launching could help improve implementation as they will be some of the strongest messengers once the program is launched.

6. Adding a Shoreline Component to the Conservation District's Program

Increasing the scope and capacity of the existing Snohomish Conservation District's programming to add shorelines technical assistance and education is feasible but would require increased funding. This could be accomplished by increased direct support from the County, grants, or an increase in the special assessment rates charged per parcel, which would require state legislative action followed by county legislative action. The Snohomish Conservation District would work with partners to support efforts to increase funding.

Covered in this section are the existing Snohomish Conservation District programs, the funding authority (related to fees), King Conservation District's shoreline program (as a model), and opportunities and challenges.

The information below is based on interviews with Monte Marti, District Manager, Snohomish Conservation District in June and July 2014, with Brandy Reed, Interagency Director and Implementation and Education Programs Manager, and Sara Hemphill, Executive Director, King Conservation District in August 2014 as well as review of the Snohomish Conservation District webpage and cited publications.

Snohomish Conservation District

Conservation districts in Washington State are independent local special purpose districts governed by supervisory boards composed of farmers, landowners, and other local citizens. Districts are tasked to help landowners protect natural resources and perform their work through technical on-the-ground, one-on-one assistance to landowners, education and outreach, and implementation of voluntary incentive-based programs.

The Snohomish Conservation District, founded in 1941, has 23 full- and part-time staff and an annual budget of approximately \$2.5 million. Snohomish Conservation District's mission is to work cooperatively with others to promote and encourage conservation and responsible use of natural resources.

Their key programs are:

- **Farm Planning and Water Quality Improvement.** Providing education, assistance and cost-share to farmers and other landowners to develop and implement farm plans and BMPs. They also help with BMP design, obtaining permits, construction and inspections.
- **Natural Resource Planning.** Working in partnership with other entities to conduct water quality and salmon recovery restoration projects such as culvert replacements and riparian plantings.
- **Information and Education.** Leading tours of demonstration sites,

conducting workshops and providing hands-on training about conservation practices including an annual awards ceremony recognizing landowners for their conservation practices. They also work with volunteers and youth on conservation projects. They partner with Snohomish County and cities to provide in-classroom education.

- Urban and Community Conservation. Conducting education and outreach for issues such as managing pet waste, protecting backyard streams, establishing native plants, improving habitat, composting, rainwater catchment, green stormwater infrastructure, and urban forestry (SCD, 2007).

The District is part of a coordinating cluster (there are 6 clusters in the State) which includes King, Pierce, and Clallam conservation districts. Resources within the cluster are shared, such as engineering services. They are also part of the Puget Sound Conservation District Caucus and work collaboratively with the other 11 Puget Sound conservation districts to help drive the implementation of projects that have a positive collective impact.

Funding Authority for Conservation Districts

The largest portion of the Snohomish Conservation District's income is from special assessments. Under Revised Code of Washington (RCW) 89.08.400.3, special assessments/rates and charges are authorized to be imposed for conservation districts in Washington State. For most of the conservation districts the maximum annual per parcel rate is \$5 but for those counties with population over 1.5 million – currently this applies only to King County – the maximum rate is \$10.

The larger assessment/rate and charges cap for King County was established in 2005 through legislative action and became effective in 2006. There is interest in increasing this cap for all conservation districts in order to provide a larger source of stable funding across the State. This is discussed in detail below.

Model Program: King Conservation District Marine Shoreline Program

King Conservation District (KCD) has a strong, effective shoreline landowner education and technical assistance program which can serve as a model for the Snohomish Conservation District. Indeed, the conservation districts have a goal of sharing program models throughout Puget Sound and the State.

Workshops

KCD provides “Where Water Begins” workshops for marine shoreline property owners. Residents who own land on the shoreline as well as those who own parcels that are upland are invited via mailed postcards. Workshop invitations are mailed to every

marine shoreline property owner as well as those within 200-500 feet of the shoreline in the County, which is about 4,500-5,000 parcels. The workshops are held on Saturdays with 3 hours of classroom curriculum followed by a 2-hour afternoon beach tour highlighting specific shoreline features and best management practices.

The overall goals of the workshops are to provide landowners with an overview on how they can promote stable natural shorelines, reduce risk of bluff erosion and landslide, and improve fish and wildlife habitat. The presenters are highly qualified professionals who are specialists in the relevant fields. In the past year, they held two workshops with a total of 80 attendees.

The workshops are relatively expensive due to staff costs for senior staff and paid consultants required to provide workshop content. Invitations are mailed to residents and a significant number of handouts are provided to workshop participants. The estimated cost is about \$175 per participant.

Individual Site Visits

Participants in workshops are able to sign up for follow-up staff visits and technical assistance (see Attachment 3 for Table of Contents for Marine Shoreline Technical Assistance Packet). An on-site visit is conducted to assess natural resource concerns, followed by an extensive management plan (can take up to 40 hours to prepare and transmit) which include engineering and vegetation management, as needed. The plans are mailed to the landowners, although in the future, KCD would like to be able to fund second visits.

Funding limitations mean that a limited number of free site visits are available to landowners each year and demand is not being met. The range in cost is \$1,200-4,000 per site, depending on the level of planning. As a result of the excess demand, the workshop presenters have been hired privately by some landowners.

Restoration Work

Through the individualized site visits conducted by KCD staff, fish and wildlife habitat enhancement projects are identified and may be eligible for limited cost-share funds.

Spreading the program throughout Puget Sound

The Puget Sound conservation districts have a regional agreement to work together, and one section of their desired portfolio is the marine shoreline riparian program. The goal is to have a standardized level of programmatic content that could be delivered by any conservation district throughout Puget Sound if funding becomes available.

Snohomish Conservation District: Opportunities

Funding

The 2014 budget of the Snohomish Conservation District is \$2.5 M, of which \$2.125 M is for programming and \$375 K is administrative and other expenses. Their funding comes from:

- Legislative approved allocations
 - Implementation money - (July 1 2014) \$94,000
 - Support for Engineering Program - \$75,000
- State match for the federal Conservation Reserve Enhancement program (CREP) - \$80,000
- Cost share and project costs - \$800,000
- Special assessment (\$5 per parcel plus \$.05/acre ~ Snohomish County and Camano Island) - \$1,050,000
- Other project specific grants and interlocal agreements: \$401,000

Their annual conservation plant sale draws over 1,000 residents.

The District did not begin assessing a per parcel fee until 2010. Previously, they had relied on other sources including legislative allocation, federal and county funding, and grants. In 2007, they learned that their direct funding from the county may need to be tapered down due to economic challenges and so the District began to work towards gaining approval for a per parcel special assessment. There are about 200,000 parcels in the county which are eligible for per parcel assessments.

Opportunity to expand programming to include shoreline landowner technical assistance

The District is interested in adding a program to provide technical assistance to shoreline landowners. They would need additional funding in order to expand their programming. With this funding, they would hire additional outreach staff and would likely contract with a geotechnical professional for the more technical aspects of the program (technical site visits). If the state legislature increases the rate cap to \$10 per parcel, the District would likely only need to add \$1 (bringing the local rate up to \$6 per parcel) to cover the costs of a shoreline program.

In addition, the District would be interested in working with the Tulalip Tribes to create a marine shoreline program because a significant number of shoreline parcels in the County are on their reservation. The District already has established joint projects with the Tulalip Tribes and can build on that relationship.

If the assessment cap is raised, the District would work with partners to determine what type of shoreline program would be best, who would provide which services, and the desired quantifiable outcomes. The likely components of a program would include:

- Outreach and education (including one-on-one outreach to landowners)
- Technical assistance follow-up
- Geotechnical assistance
- Permit assistance
- Helping landowners with the overall design and implementation process
- Information and assistance with other available incentives

Evaluation of Conservation Districts' Highlighted Need for Funding

In 2009, the Washington Conservation Commission commissioned an assessment of the role conservation districts can play in helping accomplish the Puget Sound Partnership Action Agenda, Action Agenda for the Puget Sound Conservation Districts Final Report, specifically identifying “where opportunities exist to improve the districts’ programs, planning and coordination in addressing major threats to Puget Sound.” Report authors surveyed conservation district staff.

The report highlights the key role that conservation districts play as non-regulatory, on-the-ground, technical assistance providers for landowners. In addition, conservation districts are able to adjust their programs to address emerging issues, such as shoreline armor removal, which fit within their overall mission to protect natural resources.

Opportunity to Increase Assessment Cap

The effort to increase the conservation district special assessment / rates and charges cap from \$5 to \$10 for counties with greater than 1.5 million population in RCW 89.08.400.3 was led by King Conservation District in 2005. Since then, there has been discussion and interest about increasing the caps so that other counties can benefit as well, but there has not been a concerted legislative effort.

Process

There are two potential routes towards pursuing legislation to increase the assessment/ rate cap: through the Washington Association of Conservation Districts resolution process or as an independent effort by a coalition of conservation districts. The latter is what King County did in 2005 (Snohomish and Pierce Conservation Districts were initially involved but did not end up being involved in the final legislative effort).

Summary/Analysis

The Snohomish Conservation District is interested and willing to add a marine shoreline component to their programming. If a new program were to be put in place, it would likely be modeled after King Conservation District’s successful program which includes landowner workshops followed by site visits with direct technical assistance. The District would hire a staff person to run the program and contract with geotechnical coastal professionals to provide technical assistance.

The District has a strong positive reputation and is viewed by many stakeholders as the appropriate organization to provide shoreline technical assistance because of their friendly, non-regulatory approach. They are already viewed as a credible trusted source of reliable information and assistance.

The District is unable to provide this programming at this time unless additional funding is secured. This funding could be directly appropriated from the County or from grant sources. A more stable, long-term funding solution would be an amendment to RCW 89.08.400.3 (i.e., state legislative action) so that the special

assessment rates and charges could increase above the current \$5 per parcel cap. If state statute is amended, the District would then need county council approval for an increased rate.

Incentive	Adding a Shoreline Component to the Conservation District's Program
Efficacy	High: The Conservation District has a proven track record. King Conservation District's model can be readily implemented and has shown good success.
Ease of cost	Medium: Approximately \$200,000 per year (equivalent to adding \$1 to the existing \$5 per parcel assessment rate)
Administrative feasibility	High: District's 5-Year Plan includes shoreline outreach and the District believes that it can be readily incorporated.
Unintended consequences	Medium: Increase in assessment rates may cause backlash against other potential tax increases or in other County service fee areas.
Sustainability	High: if assessment rate increase is secured. Otherwise low.
Political feasibility	Medium: There is good momentum towards passing a statute amendment, but a significant amount of work will be needed.
Ease of startup	Low: Would require effort to build coalition in order to support state and county legislative effort.

Recommendations/Next Steps

- Support from the Washington Association of Conservation Districts or the establishment of a stakeholder coalition will need to be developed in order to move this incentive forward. This group would help support state legislative action to increase the assessment rates and charges cap or find other funding sources.
- Stakeholder support from groups like the MRC will be needed at the County level in order to gain council approval of a higher rate (i.e., \$6 rather than \$5 per parcel) in 2019 to support a shoreline program. Approval of a higher rate could occur sooner with stakeholder support and if the County Council was willing to make the adjustment.
- If successful, or if another source of funds becomes available, the District will work with stakeholders to develop a shoreline program with clear objectives and measurable outcomes (i.e., goal is removal of armor for xx number of parcels).

7. Summary

Summary Table 2 summarizes the features of the four selected incentives.

Table 2. Comparison of features of four incentives

Incentive	Establishing a Beach Management District	Creating a Shorelines Education and Technical Assistance Program	Offering Focused Shoreline Grants or Cost-Share Awards to Landowners	Adding a Shoreline Component to the Conservation District's Program
Efficacy	High: A narrowly focused district can be highly effective in tackling the key needs.	High: A well designed education and technical assistance program with clear outcomes and a strategic approach can be effective.	High: If a high enough financial incentive is offered, the program will likely be successful. The challenge is identification of the source of funds and determining the correct price-point.	High: The Conservation District has a proven track record. King Conservation District's model can be readily implemented and has shown good success.
Ease of cost	Medium: Costs for administration by the County depends on the size of the district and the scope of responsibilities.	Low: Education and technical assistance can be expensive unless properly targeted for the desired outcomes.	Low: Funding source is needed. Administration costs by the County depend on the size of the project (number of awards). Cost also depends on scope of effort (total cost of the awards).	Medium: Approximately \$200,000 per year (equivalent to adding \$1 to the existing \$5 per parcel assessment rate)

Incentive	Establishing a Beach Management District	Creating a Shorelines Education and Technical Assistance Program	Offering Focused Shoreline Grants or Cost-Share Awards to Landowners	Adding a Shoreline Component to the Conservation District's Program
Administrative feasibility	High: A beach management district is already allowed by statute and similar lake management districts are in place throughout Washington.	High: The existing agencies and organizations in Snohomish County have the potential to conduct this program.	High: A similar model (CWD) is already in place.	High: District's 5-Year Plan includes shoreline outreach and the District believes that it can be readily incorporated.
Unintended consequences	Medium: A new district could be confusing to residents. There may be overlaps with other districts' responsibilities.	Medium: Conducting education and technical assistance about marine shorelines might divert efforts related to other priority concerns.	Medium: There could be concern about providing cost share programs to relatively wealthy shoreline landowners.	Medium: Increase in assessment rates may cause backlash against other potential tax increases or in other County service fee areas.
Sustainability	High: If established, a long-term funding source would be secured.	Low: Because of the high cost of a program, long-term funding (such as funding for the Conservation District) is needed.	Low: The program will depend on funding.	High: if assessment rate increase is secured. Otherwise low.

Incentive	Establishing a Beach Management District	Creating a Shorelines Education and Technical Assistance Program	Offering Focused Shoreline Grants or Cost-Share Awards to Landowners	Adding a Shoreline Component to the Conservation District's Program
Political feasibility	Medium: A beach management district would likely only be established if there is local support. The County would not act without local support and initiative.	High: The development of shoreline education and technical assistance program builds on existing efforts in the county.	Medium: If funding is secured (grant), then the program will likely be favorable viewed.	Medium: There is good momentum towards passing a statute amendment, but a significant amount of work will be needed.
Ease of startup	Low: State legislative action may be needed in order to allow a beach management district to address shoreline armor as part of the responsibilities. In addition, community support would be needed to initiate a district.	Medium: In addition to finding funding, an effort would be needed to create a high quality program and work with all of the partners to create a strategic approach.	Low: Existing models are available, but a new program would need to be formulated.	Low: Would require effort to build coalition in order to support state and county legislative effort.

All four selected incentives have some barriers to implementation. Thus, a significant level of effort will be required to move forward to create a shoreline armor reduction program using incentives. On the other hand, these programs have generally been shown to be effective in other applications and with careful targeted effort, using a strategic overall approach, there is a good opportunity for success.

In the stakeholder review process, participants recommended that a package of incentives be developed. Multiple incentives would meld well together in different combinations to create program that includes three key elements: funding, permitting/technical assistance, and education/demonstration. To be most effective, one entity, potentially the County and the MRC, will need to step forward to lead the effort.

Recommendations/Next Steps for Each Incentive

The following recommendations and next steps for each incentive are brought together here for ready review. As noted above, it would likely be beneficial to pursue several of these incentives together as a package.

Establishing a Beach Management District

- A dedicated effort would be needed to work with residents in the potential district boundary to develop support for a new beach management district.
- Key questions regarding district boundaries, interfacing with existing districts, and rates would need to be given careful consideration. A subcommittee or a dedicated task force could be established to focus on these questions.
- Legislative action may be needed to allow beach districts to address armor removal. A group of interested stakeholders, likely from throughout Puget Sound, would need to be established and supported.

Creating a Shorelines Education and Technical Assistance Program

- Choose one agency to be the lead of the effort, such as Snohomish County which can bring together a variety of partners and agencies.
- To effectively implement an education and technical assistance incentive, it will be important to create a strategic approach upfront that capitalizes on the strengths of the existing organizations, avoids duplication, and has clear and measurable outcomes. Such an effort will likely make it easier to justify funding from potential sources.
- All of the components of a program should be included in order to be effective: broad education, workshops, outreach materials, and one-on-one site-specific technical assistance.
- Evaluation is critical. Many such programs do not meet desired outcomes. Often changes are needed mid-stream. Funding should be dedicated to high quality evaluation throughout the implementation of the program.
- This incentive could be combined with other incentives (e.g., Beach Management District) that provide funding to support the technical assistance.

Offering Focused Shoreline Grants or Cost-Share Awards to Landowners

- An effort will be needed to secure funding in order to support local cost-share awards.
- A task force or work group would be beneficial so that details can be worked out for strategic deployment of the grants, including application process, accountability, long-term maintenance, messaging and outreach.
- An important factor to determine is the correct price-point which will be enough of a motivator for landowners to take action but is not too costly to fund with grant or tax dollars. An assessment of this is needed up front.
- Reaching out to the industry (contractors and real estate agencies) for feedback on the program before launching could help improve implementation as they will be some of the strongest messengers once the program is launched.

Adding a Shoreline Component to Conservation District's Program

- Support from the Washington Association of Conservation Districts or the establishment of a stakeholder coalition will need to be developed in order to move this incentive forward. This group would help support state legislative action to increase the assessment rates and charges cap or find other funding sources.
- Stakeholder support from groups like the MRC will be needed at the County level in order to gain council approval of a higher rate (i.e., \$6 rather than \$5 per parcel) in 2019 to support a shoreline program.
- If successful, or if another source of funds becomes available, the District will work with stakeholders to develop a shoreline program with clear objectives and measurable outcomes (i.e., goal is removal of armor for a predetermined number of parcels).

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**Appendix 1: Port Susan Marine Stewardship Area
Shoreline Protection Incentives Project: Expert Review
of Incentives Report**

**Appendix 2: Port Susan Marine Stewardship Area
Shoreline Protection Incentives Project: July 2, 2014
Workshop Report**

July 8, 2014

Background and Goal

As part of the Port Susan Marine Stewardship Area Shoreline Protection Incentives Project, key informants were identified and approached for interviews. All of the key informants agreed to be interviewed, for a total of 16 people. Some of the interviews were conducted in person but many were by telephone. Interviewees were provided with a handout (See Attachment 1) which summarized potential incentives for consideration. These incentives are drawn from Futurewise's report: *Practical Guide: Incentives to Help Meet Priority Shoreline Restoration and Protection Objectives (draft)*. In order to help shorten the interviews, later interviewees were shown a shorter version of the list (because many incentives had received negative responses from earlier respondents). The goal of the expert interviews was to winnow the initial list of 30 potential incentives down to about 10 incentives to be discussed at the July 2, 2014, workshop.

Key Informants

The interviewees were informed that their interview would be confidential and all of the responses would be incorporated into a summary document. Key informants were chosen because of their knowledge or role in the county with regard to property owners, shoreline ecological health, land use policy, or permitting.

Key informants interviewed were:

- Kristin Kelly, Futurewise
- Chrys Bertolotto, WSU
- Daryl Williams, Tulalip Tribes
- Todd Zackey, Tulalip Tribes
- Valerie Steele, Green Properties
- Barb Mock, Snohomish County PDS
- Karen Stewart, Snohomish County SWM
- Stef Frenzl, Snohomish County SWM
- Monti Marti- Snohomish Conservation District
- Debbie Terwilleger, Snohomish County SWM Director
- Karen Kerwin, Snohomish County SWM
- Laura Arbor, WDFW
- Tom Rowe, Snohomish County PDS
- Erik Stockdale, Department of Ecology
- Jerry Masters (Master Builders and Valley Supply
- Will Hall, Snohomish County Council Staff

Barriers

Key informants were asked to briefly describe their role in working with landowners and then to list the key barriers that they think would apply to marine shoreline residential landowners regarding removal, replacement or avoidance of shoreline armor. The identified barriers are:

- Cost
- Don't want to be told what to do
- Unaware of alternatives to armor
- Unaware of why alternatives are needed
- Trust bulkheads (and bulkhead is already there)
- "We have always done it this way, why do we need to change anything?"
- First contact is usually with contractors
- Aesthetics (homeowners like a certain look)
- Permitting (time and cost)

Incentives Which Did Not Move Forward

Key informants were asked about each of the 30 potential incentives and asked to provide their pros and cons about each. At the end of the interview, they were then asked to list their top 3 or 4 which they think would be feasible to move forward as a pilot project. This process helped eliminate 20 incentives from the list to the 9 presented at the workshop. These are listed below with the key reason(s) shown in italics.

Funding Sources

- Conservation Futures Tax
 - *The program is mostly used for larger projects with high habitat value and there is already a long list of projects in line.*
- 1% Conservation Area Real Estate Excise Tax (REET)
 - *There is already a REET in place for another issue and there is likely not going to be support to add another REET. Real estate agents would particularly oppose it.*
- Flood Management Tax District
 - *There is not a strong nexus in that most people think about floods with freshwater systems, and especially rivers. Respondents did not think it would be a transparent connection to shoreline armor.*
- Shellfish Protection
 - *The connection of armor to water quality is not a strong enough tie (with regard to shellfish protection). Many of activities are in the upper watershed (agriculture). Respondents did not think it would be a transparent connection to shoreline armor.*
- Park and Recreation District
 - *There is not a significant amount of park land in the area that is not adjacent to the railroad. The main issue would be public access which is already relatively abundant.*

Financial Incentives

- Federal Tax Credit
 - *While there was interest in a tax credit but respondents did not think it is a feasible idea to pilot at the county level.*
- Tax Incentive for the Donation of Land or Conservation Easements
 - *This would appeal to a small number of landowners. Also, the parcels are relatively small.*
- Conservation Reserve Enhancement Program (CREP) – stewardship and cost share program
 - *This program is most suitable for agricultural projects. These farm bill programs require a large amount of paperwork.*
- Agricultural Conservation Easement Program (ACEP) - Wetland Reserve Easements. (Formerly Wetland Reserve Program (WRP)) – stewardship and cost share program
 - *This program has historically had low levels of funding and is targeted for wetlands.*
- Environmental Quality Incentives Program (EQIP) (formerly Wildlife Habitat Incentives Program (WHIP)) – cost share program
 - *This program is focused on larger wildlife habitat projects.*
- Forestry Riparian Easement Program (FREP) – stewardship program
 - *This program is focused on forestry projects.*
- Direct Funding
 - *This incentive is similar to the Local Award Funding incentive which received higher interest. General funds are very tight.*
- Grants Awards (e.g., federal, state grant programs)
 - *This is already being done and so there was little interest in moving it forward as a pilot.*
- Restoration Auction
 - *There was concern that this approach would cause resentment in the community (i.e., bidding against each other) when the goal of the project is to get community members to work together.*
- Packaged Proactive Funding
 - *It is virtually impossible to designate funds at the county when there is not an identified need. There was an idea, however, to develop a public-private partnership with major private foundation funders.*

Non-Financial Incentives

- Regulatory Transfer of Restoration Credits for Later Mitigation
 - *Advance mitigation is difficult to manage and to make accountable. Also, there would not be a net gain for the environment.*
- Legislative Rolling Easements or Erosion Easements
 - *This approach is more applicable to coastlines (like North Carolina) in which there are large dunes which move back and forth on a decade timeframe.*
- Restoration In Trade for Projects
 - *There was concern that this approach is difficult to keep equitable and accountable. Neighbors might complain that their neighbor got a better deal.*

- Restoration In Trade Established in Code
 - *This approach would work better in an area that is already built out (like Lake Washington). Otherwise, there is a net loss to the environment.*
- Safe Harbor Agreements
 - *Because shoreline property owners are not held accountable for endangered species, in contrast to the forestry industry, respondents did not feel it was applicable.*

Incentives Which Moved Forward

At the end of the interview phase, the incentives were winnowed down to 10. Two were combined – Technical Assistance and Education – because key informants believed that they would need to be done together. The nine incentives are listed below with the pros and cons, as well as specific additional implementation ideas from the respondents.

1. Conservation District

Pros

- Has great reputation/credibility.
- Already works with landowners.
- Is sellable: Raising rate by \$1 more per year is feasible if tied to benefit gained.
- Has existing engineering resources/professionals that could be trained for this program.
- Has existing legal authority and flexibility to add to program and allocate funding.

Cons

- Might be difficult politically to raise rates. Recent rate increase was a bit of an effort.
- Mission is known to be about food production, horse, agriculture (not shoreline health).
- Might be perceived as duplication of services: residents are paying fees/taxes for lake district, flood, SWM, existing conservation district, which all seem to be for similar benefits.

2. Beach Protection District

Pros

- Has good nexus and transparency (tax payers would be closely related to the geographic area/issue involved).
- Can include broader issues such as sea level rise, spartina, water quality, shellfish, salmon health.
- Can capitalize on existing structures (organized homeowner groups)
- Is sellable: Call it “stewardship.”
- Is more persuasive to the elected officials if residents come forward and say they want to tax themselves.

Cons

- Could be perceived as punitive, because it is a tax.
- Is a further form of fractionation of management (i.e., not countywide).
- Requires auditing.
- Needs additional staff resources.

3. Public Benefit Rating System (PBRs)

Pros

- Existing current use program is extensively used.
- Would likely be most used for bluff homes (larger lots with more room for restoration).
- Is appealing to real estate brokers and title companies. They want to find ways to promote properties.
- Can save county money in the long run.
- Would be good to try it to gather data.
- Would be good as part of incentives toolkit.

Cons

- Could be difficult to make PBRs applicable for thin linear feature (i.e., armor).
- Need to look at size of parcels to determine if it would be worthwhile.
- Existing program is not working so well (have not been checking to ensure accurate use of land).
- Will shift tax burden.
- Takes a big time commitment. Takes resources to administer.
- May not result in perpetual conservation easements.

4. Tax Reduction for Restoration Improvements

Pros

- Provides tax benefit for taking action.
- Is sellable: "Anything that government can do to reduce taxes helps."
- Could likely result in permanence (need to ensure that).
- Could include a stewardship component.

Cons

- May not be a large value because properties are relatively small.
- Would take a champion (elected official) to get passed.
- Might create a tax burden for others or other needs.

5. Offering Local Award Funding

Pros

- Would be good as part of package with technical assistance.
- Have model: Stilly CWD has a discretionary fund that funds water quality for shellfish.
- Has potential to incentivize neighbors to address issue at a larger scale.
- Would need to market it in an attractive way.

Cons

- Need to capitalize it.
- Not sure if \$5000 per person would be enough.
- If use stormwater fee, fund has many other priorities and there could be nexus issues.
- Have to be careful of "gift of public funds."

Specific Ideas: Local Award Funding

- Local award funding has the potential to incentivize neighbors working together to remove armor, instead of doing it one landowner at a time.
 - Could structure the program so that if five neighbors apply, the county would pay for 50%, but if single landowners apply the county only pays 25%.
 - Alternatively, higher scores could be awarded if working together (the more applicants working together, the higher they rank).

6. Lower Interest Loans

Pros

- Would be good as part of incentives toolkit.
- Have models: historic rehab program, new septic program.
- These programs have been popular.
- Would have relatively low cost to the county.
- Would be used by a certain group of people (don't have the cash upfront).

Cons

- Would involve significant paperwork for landowner.
- Has potential challenge with permits. Would they loan the money for the permits and process? There is no assurance that the permit would get approved.
- May not be as motivating as septic replacement (i.e., something you HAVE to do).
- Would likely have some % of foreclosures.

Specific Ideas: Lower Interest Loans

- Existing investment model: Could form a nonprofit with one of the above funding streams (like a Beach District).
- Existing onsite septic low interest loan program: County received \$400K grant to create program modeled after energy efficiency. The grant money guarantees the loan. Potentially, this program could be expanded to include armoring.

7. Technical Assistance/Education

Pros

- Has willing audience. People are receptive to finding out what to do. They want the info, so they can make informed decisions.
- Fills gap (lack of knowledge).
- Helps open the door.
- Is needed in order to effect change ("Landowners are not going to change unless you provide this").
- Fulfills critical role for government (providing assistance related to regulatory function).

Cons

- Has challenge of gaining participation by non-receptive landowners.

- Has challenge of reaching and successfully persuading summer residents (their perception of their property is different than the year-round residents).
- Need to make sure that it is not duplicating other efforts (who is doing what...).
- Need to have defined and strategic outcomes.

Specific Ideas: Tech Assistance/Ed

- Would great to include training for the permitting staff.
- Demonstration sites/model sites like Low impact development.
 - County supported restoration = 5 year agreement for site visits.
- Need for training and licensing of contractors.

8. Recognition/Award/Certification Programs

Pros

- Capitalizes on people’s desire to be recognized when they do good work.
- Is good way to get the word out: “It wasn’t that hard.”
- Have models: Sound Horsekeeping Program.
- Helps with curb appeal.
- Could be expanded to include whole site (home and property).
- Would be good as part of incentives toolkit.

Cons

- Not a decision-changer for people.
- Not necessarily a motivator for this population (which is being pushed more by market conditions).
- Might be discontinued when the home changes over to new owner.
- Could be perceived as “fluffy” or meaningless.

9. Permit Process Streamlining/Waiving Fees

Pros

- Likely popular with homeowners.
- Could help make process easy and less costly (and time is money).
- Could help with the problem that soft shore alternatives are currently getting MORE scrutiny than those using old methods.
- Could do hybrid approach that uses pre-approved plans.

Cons

- Would be difficult to sustain (general fund too tight for reduced fees). Permit staff is fee supported.
- Could get resistance by development community who would have to pay higher fee and who are expecting service.
- Still have to wait for the state and other permits.
- Could be difficult to define (What is green?)
- Currently, numerous applicants claim they should be a priority (schools).

Specific Ideas: Permit streamlining

- Tiered fees. If project is 100% green, get full fee reduction, if 75%, less reduction, etc.
- Have model: County currently has pre-approved plan (retaining wall) which is quickly approved.
- Could combine technical assistance with pre-approved plans. Then landowner just has to go through just 1 permit cycle rather than 3-4 cycles.
- Could create a construct for a larger effort, on a reach or drift cell scale that involves technical assistance (geotech, reach-scale design, etc.).

Attachment 1. Potential Funding Tools and Incentives for Shoreline Properties Handout

FUNDING TOOLS		
<p>Conservation Futures Tax A Conservation Futures Tax is a special property tax that can be used to acquire land and maintain and often restore that land for conservation purposes.</p>	<p>1% Conservation Area Real Estate Excise Tax (REET) A 1% Real Estate Excise Tax (REET) for Conservation Areas is a special tax on property sales, which can be used for purchase of land or easements and maintenance for conservation.</p>	<p>Flood Management Tax District A Flood Management Tax District is used to prevent or repair damage due to flooding through land acquisition, restoration, and levee setbacks, funded by a special property tax and other fund sources.</p>
<p>Shellfish Protection District A Shellfish Protection Districts is a special district that addresses water pollution sources and can do some types of restoration work related to shorelines to improve water quality and conditions for shellfish growing.</p>	<p>Park and Recreation District A Park and Recreation District is a special district, which may or not be funded with a tax, that focuses on parks and their facilities and can acquire ecologically important shorelands.</p>	<p>Conservation District A Conservation District is a special district, funded in a variety of ways that conducts activities to protect air and water quality for farms, natural resource lands, and other lands, and can conduct restoration work.</p>
<p>Lake and Beach Management District Lake and Beach Management District are special districts, funded by local taxes or fees, set up to protect lakes and beaches, usually focusing on aquatic weed control but can be extended to do restoration work.</p>		
FINANCIAL INCENTIVES		
<p>Federal Tax Credit A Federal Tax Credit is a direct reduction of taxes owed, whether for income, estate, excise or other tax.</p>	<p>Current Use Tax Assessment and Public Benefit Rating System A Public Benefit Rating System program gives a landowner a property tax reduction if they agree to steward and preserve some of their land as open space.</p>	<p>Tax Reduction for Restoration Improvements A Tax Reduction for Restoration Improvement provides for future tax reductions for voluntary conservation improvements.</p>
<p>Tax Incentive for the Donation of Land or Conservation Easements A tax incentive for a donation of land or conservation easement is available to landowners who are willing and able to make such donations.</p>	<p>Conservation Reserve Enhancement Program (CREP) – stewardship and cost share program The Conservation Reserve Enhancement Program (CREP) provides cost-share and restoration auction funding for restoration work as well as stewardship funding to encourage beneficial practices for help improve water quality by restoring riparian areas along streams.</p>	<p>Agricultural Conservation Easement Program (ACEP) - Wetland Reserve Easements. (Formerly Wetland Reserve Program (WRP)) – stewardship and cost share program The Wetland Reserve Easement Program obtains easements and provides funding and cost-share funding for restoration of wetlands.</p>
<p>Environmental Quality Incentives Program (EQIP) (formerly Wildlife Habitat Incentives Program (WHIP)) – cost share</p>	<p>Forestry Riparian Easement Program (FREP) – stewardship program The Forestry Riparian Easement Program (FREP) is a conservation easement program</p>	<p>Direct Funding Direct funding – the use of budgeted funds or general funds – by organizations or agencies is a way to directly fund projects or provide financial</p>

<p>program Environmental Quality Incentives Program (EQIP) is a cost sharing program that can fund restoration projects for fish and wildlife habitat on lands that have been negatively impacted by agricultural or forestry activities or by invasive species.</p>	<p>for small landowners that produce timber, providing compensation for trees required to be left next to streams, wetlands, seeps, or adjacent unstable slopes.</p>	<p>incentives to property owners to do desired restoration or protection work.</p>
<p>Offering Local Award Funding A program offering local award funding, typically small awards, is an approach to directly promote restoration activities by landowners in targeted activities through cost-share, small grants or other financial tools.</p>	<p>Packaged Proactive Funding Packaged proactive funding for restoration projects is an effective way to quickly leverage partnerships and funding from multiple sources to do high ecological value projects, often on private land, when opportunities arise.</p>	<p>Lower Interest Loans Lower interest long-term loans (15 to 30 years), funded by tax exempt nonrecourse revenue bonds, revolving loans, or a loan loss reserve program, are provided to property owners to replace bulkheads with soft shore stabilization measures and enhanced shoreline habitat.</p>
<p>Grants Awards (e.g., federal, state grant programs) A grant award is a significant amount of funding received by an entity to perform preservation or restoration work and is often available to support work on shorelines.</p>	<p>Restoration Auction A restoration auction is a program in which landowners bid for grants to conduct restoration work.</p>	

NON-FINANCIAL INCENTIVES

<p>Technical Assistance A technical assistance or education program increases awareness of landowners about science, regulations, and opportunities related to shoreline protection and restoration.</p>	<p>Education Programs An education program increases awareness of landowners about science, regulations, and opportunities related to shoreline protection and restoration.</p>	<p>Recognition, Award, or Certification Programs A recognition, award, or certification program is a public acknowledge of a landowner that motivates or provides positive feedback that motivates that landowner and other landowners to take additional restoration and protection actions.</p>
<p>Permit Process Streamlining or Waiving Fees for “Green Projects” Permit streamlining or waiving fees promotes inclusion of voluntary restoration (“green projects”) in development projects by landowners in order to speed up their permitting or reduce their permitting costs.</p>	<p>Regulatory Transfer of Restoration Credits for Later Mitigation Regulatory Transfer of Restoration Credits for Later Mitigation allows banking of credit for use to mitigate future development projects, thus promoting early restoration work.</p>	<p>Legislative Rolling Easements or Erosion Easements A legislative rolling easement or erosion easement is an easement line that changes horizontally as the waterline changes due to erosion, changes in water level and other reasons.</p>
<p>Restoration In Trade for Projects Restoration in Trade for projects is an approach in which a small development item is allowed for a landowner in exchange for doing a significant restoration project.</p>	<p>Restoration In Trade Established in Code Restoration in trade established in code allows for reductions in requirements (such as setbacks) in exchange for ecological enhancements such as removing bulkheads.</p>	<p>Safe Harbor Agreements Safe Harbor Agreements give landowners the assurance that they will not be required to protect threatened or endangered species on newly restored land, if they do a restoration project.</p>

Goal

Conduct a workshop of interested stakeholders to discuss the nine initial strategies and prioritize the list for the top three to five incentives that could protect nearshore habitat in the Port Susan Marine Stewardship Area, Snohomish County.

Agenda

See Attachment 1

Attendees

- Valerie Steele, Greening Properties
- Barb Mock, PDS
- Karen Stewart, Snohomish County
- Stef Frenzl, Snohomish County
- Monti Marti, Snohomish Conservation District
- Debbie Terwilleger, Snohomish County SWM Director
- Jerry Masters, Master Builders and Valley Supply
- Gabe Snedeker, Snohomish County PDS
- Alyson Rae, Snohomish County
- Kathleen Herrmann, Snohomish County
- Heather Trim, Futurewise
- Hayley Bonsteel, Futurewise
- Tom Hoban, Snohomish MRC
- Will Hall, Snohomish County Council Staff
- Gregg Farris, Snohomish County SWM

Objective and Background

After introductions, Kathleen Herrmann gave a brief overview of the project. She explained the goal of selecting 2-3 incentives to move forward as pilot projects. The initial 30 incentives identified in Futurewise's original report have been winnowed down to nine for consideration at the workshop. The list of 9 incentives was chosen after a set of key informant interviews in which respondents identified pros and cons (see *Expert Review of Incentives Report*).

Presentation 1 – Social Marketing to Reduce Shoreline Armoring

Heather Trim presented information from the recently completed social marketing study/barriers study with data for Puget Sound contrasted with specific data for Snohomish County (See attachment 2 for PowerPoint slides). The goal of the project was to create a behavior change strategy for Puget Sound to incentivize marine shoreline property owners to remove armor, avoid armor and/or install soft shore protection.

Part I of the presentation included data for Puget Sound and Snohomish County parcels. 57% of marine shore edge in Puget Sound is residential. In Snohomish County, there are 1,675 residential parcels along the marine shoreline; 1,316 are owned by individuals. 65% are armored (1,088 parcels). Of mapped forage fish spawning areas, 58% of parcels are armored, mirroring the trend in Puget Sound.

There is opportunity in Snohomish County for armor removal and/or replacement with soft shore protection for the parcels where erosion risk is low-moderate, home is present, and armor is present (14.7 miles). Where there is no armor, but have a home, with low erosion, we want to encourage not putting in armor (7.7 miles).

There is a higher percentage of parcels with homes are owner occupied (61%) in Snohomish than Puget Sound overall (46%). There is a lower percentage of parcels with owned by persons living outside the county (22%) than Puget Sound overall (39%). Few parcels (55) are owned by those outside of state or US – lowest in Puget Sound. The age of owners is highest in the 60-69 year old cohort, followed by the 70-79 year old cohort. 31% of owners in Snohomish are under the age of 60, which is among the highest percentage in Puget Sound. Shoreline property owners are highly active voters: 95% of current voters in Snohomish County voted in a one-year period (Nov 2012-Oct 2013), higher than King County and State.

In the Puget Sound overall, \$100-400k and \$400-700k is most common value of parcels (land and improvements). Snohomish County has a higher percentage in the \$400-700k range than Puget Sound. Upon reviewing the data for parcel size by county, Snohomish County has more smaller parcels than other counties. Smaller parcels with homes (< 1 acre) are more likely to have armor; larger parcels with homes are less likely – in Puget Sound overall. In Snohomish county, parcels smaller than 2 acres are more likely to have armor.

Part II of the presentation included the results of a survey of shoreline property owners in Puget Sound sent by mail, which had a 30% response rate. The respondents were mostly male, retired, 65 or older, with college degrees, and 6-figure incomes. The likelihood of behavior response was that the shoreline parcel owners are highly likely to leave unarmored parcels in an unarmored condition. The likelihood of removing some armor is low but not as low as expected.

Barriers to leaving parcels unarmored included concerns about changes in erosion or threats to property by increasing erosion or events changing shoreline dramatically. Motivators to leaving it unarmored were being confident the property would be protected, enjoying the look of it, and providing healthy habitat for fish and wildlife.

Barriers to removing/replacing armor included concerns that property would not be protected, Expense, and regulations and permitting making process difficult. Motivators to removing/replacing armor were being confident the property would be protected or enhanced by it, getting a tax break or reduced fees, getting a loan or grant, streamlined permitting and processes, and providing healthy habitat for fish and wildlife

The recommended shore friendly campaign toolkit including assistance/guidance, website, free site assessments, workshops, financial incentives, nonfinancial incentives, promotions, influencer tools, contractor certification program, tours, marketing, trainings, real estate broker programs, etc.

Questions after Presentation 1 mainly consisted of discussion of the survey methodology.

Presentation 2 – Incentives

Kathleen Herrmann then delivered a presentation (See Attachment 3) that summarized the results of the key informant interviews including the identified barriers and the pros and cons for each of nine incentives. The barriers and incentive pros and cons are summarized in the *Expert Review of Incentives Report*. After each incentive was presented, workshop participants provided brief comment and additional pros and cons which were recorded and are summarized below.

1. Conservation District (CD)

- Existing Conservation District allows for shoreline health in its mission, but staff aren't trained on shoreline issues.
- The CD hasn't gone into that work much yet because of liability, but it's emerging.
- The CD services are based on people coming to them and strong relationships. Their work is not regulatory in nature.
- One of the things that the District is doing is coordinating and sharing resources with other Conservation Districts in the Puget Sound.
- The Conservation District probably won't hire geotechnical engineers as staff but may consider contracting an outside firm for that role.

2. Beach Protection District

- No beach protection districts exist in Puget Sound.
- Snohomish County does have two lake protection districts which have taxed themselves to address invasive plants.
- Whidbey Island has many homeowner groups that share community beaches, collectively care for them. This makes a good precedent. District could contribute to beach upkeep. Snohomish County has this in some way too.
- Could DNR fund this? Maybe through LIO? DNR has ownership interest with tidelands
- Whidbey also has people who moor out their boats; they are supposed to get a permit through DNR. So this could be a way to connect with DNR.
- As long as a district is marketed as positive aspect of development, real estate brokers shouldn't have trouble selling the concept to residents.
- This idea could be too complex and broad and not focused on the specific issue of armoring.

3. Public Benefit Rating System (PBRs)

- It is up to jurisdiction to use their policies to determine important criteria and point system that reflects those priorities. In Island County the whole parcel is listed – how does Snohomish County account for armor?
- SMP guidelines may not allow armoring at many places, thus this incentive should not apply to new armor where it is disallowed. How do you equate that to a tax benefit?

Adds a level of complexity to decision about whether a bulkhead can be put there – marine traffic, etc.

- MRC to calculate erosion potential in next Northwest Straits Commission grant.
- This incentive concept needs to be tried to gather data.
- Some counties with PBRs do require perpetual conservation easement – local jurisdiction can consider this in creation of criteria.

4. Tax Reduction for Restoration Improvements

- Stewardship is part of package of technical assistance. When you talk to the landowner, you tell them about tax break, long term management, etc.
- This concept could go beyond shoreline to other parts of property.
- This concept would work well coupled with conservation district or land trust.
- These tax reductions are used very minimally in WA State.

5. Offering Local Award Funding

- Specific ideas: instead of one person at a time, could structure the program that if multiple people apply, county would pay 50% but when single people apply, county only pays 25%. This makes sense because economy of scale. Also higher scores could be awarded if neighbors are working together. Contiguous properties can work together and accomplish more ecologically.
- Properties can be impacted by neighboring bulkheads so there would be encouragement for people to work together.
- We've seen this collaboration with farmers in valley because there is perceived common threat. Beach residents who are neighbors may be pretty likely to band together.
- Neighbor encouragement goes farther than government encouragement.
- People will band together to get site visits as a neighbor group, so they may band together on this as well. Have to package it so that you only get help if you partner.
- Landowners don't necessarily want large sums of money – \$5,000 was used in Kitsap rain garden example.
- This can be structured in a way that includes preapproved or adaptable designs - technical assistance can be expensive, construction should be where the money goes.
- Soft armoring requires higher maintenance, so there is fear on part of owners regarding maintenance. Softshore solutions may require more frequent maintenance – but when bulkhead does have a problem, it is a much bigger deal to replace. Long term costs are likely lower with continued maintenance than with a rapid fail of a bulkhead – it would be great to have the numbers on what it costs to maintain.
- Need to make sure landowners can keep up with maintenance after award runs out, especially with soft shore projects.
- If county decides to do this, this should be part of grant application with DNR through PSP where the County provides match. DNR can be involved in long term maintenance – get state involved to extend these dollars, since it's going to be a small amount of money that county can leverage.

- Would be helpful to have the numbers available for people of cost of soft shore versus bulkhead construction AND maintenance.
- We are not trying to get all homeowners; we are most interested in offering incentives to the willing.

6. Lower Interest Loans

- Existing onsite septic low interest loan program: county received 400k grant to create program modeled after energy efficiency. Grant money guarantees the loan; this program could be expanded to include armoring.
- Specific idea - could form a nonprofit. Example of a church – already a nonprofit. The board members were first investors who put into bundle of funds handled through escrow. They could determine amount of interest on investment. They each had vested interest. They created pro forma, business plan, as way to convince other investors. So these people would be funding themselves. They can pay loan back through revenue generating activities like art sales, auctions.
- New county program for septic systems: same model as low interest energy improvements. Grant money received through financial institution. The county deposits a certain amount of money to back the loans. Low risk for bank because if someone defaults, there is loan loss reserve that will reimburse them. Low interest competitive loans can then be offered to property owners if they meet criteria.
- The benefit is that this incentive also helps employ contractors, in addition to helping homeowners.
- We can base interest rates on energy rates – the septic repair rate is based on energy repair.
- The dollar you deposit on financial institution stays there so there is a low default rate and you can continue to offer program.

7. Technical Assistance/Education

- Any program should include technical assistance/education, but by itself it may not yield good results.
- Should be tailored with other programs.

8. Certification/Recognition/Award

- Similar to previous incentives, the potential is there, fairly high social capital.
- In areas where everyone has bulkhead, these kinds of programs can be very beneficial.
- Should pair this incentive with technical assistance (like LakeWise program).
- Landowners have demonstrated interest.
- Having a new way to brand this would be a good extension (i.e., shore friendly). If certification process was robust (and follow up was robust as well), this could be gateway to access for other benefits, particularly if certification program is run by a non-government entity. Target population may have different priorities.

9. Permit Process Streamlining

- This incentive could combine with pre-approved plans and technical assistance.

- This incentive could also create a construct for a larger effort on a reach or drift cell scale that involves technical assistance.
- For this to work, we would have to replace revenue stream, as this can't be added to the budgets of local permitting departments. Staff would still be needed to review permits.
- Geotechnical reports across a broader swath are on the right track. These are site specific, but if you can get studies that cover broader area with standardized designs, that would be best.
- If we make the policy choice that this is the way the state wants to go, there are more options. The parcels in question are the most restrictive and have so many agencies; there is no place on earth that has more requirements--so state has to say, "This is what we want to do." We can't expect local government to cut out steps, as there would still be a need for environmental review, etc. If this is what is wanted, we would have to amend code.
- Fees are an issue. Many of these homeowners are not professional contractors or developers. They require much time-consuming attention. The county still ends up losing money because of hours staff spends walking through process with customers on the phone or in person.
- In theory, this streamlining already exists in JARPA, but it doesn't work well.
- Comprehensive geotechnical reports would be good but standardized designs might eliminate thinking outside the box; innovative solutions (as in Scandinavia) might fit a particular site, but wouldn't be considered if there were standardized designs. Permit agencies don't have the same degree of confidence, so part of the problem is how to get permit agencies as familiar with it so they can draw commonalities. These are unique pieces of property with unique influences of tide and soil types, so retaining walls are never standardized. Building officials who administer codes say "this works, this works" – if you bring something in like this they have to look and approve alternative methods – it takes a while for the officials to adapt to new technologies – and then applicant gets caught in that delay.

10. Packaged Proactive Funding

- We also had a quick discussion about an idea related to Packaged Proactive Funding in that the specific idea would be to contract with a private NGO.

Ranking

Participants then ranked each incentive from favorite to least favorite (1-9) in two rounds. The results were:

First Round of Priority Ranking: Top Two Incentives:

<i>Incentive</i>	<i>Rank</i>
Beach Protection District	#1

Second Round of Priority Ranking: Top Three Incentives (Leaving out top two):

<i>Incentive</i>	<i>Rank</i>
Technical Assistance/Education	#1
Offering Local Award Funding	#2
Public Benefit Rating System (PBRs)	#3

Discussion related to the ranking included the following points:

- Technical assistance and education didn't rank high in first round, but they have to be included in other incentives programs. Funding won't solve problem – technical assistance can't function alone because the money has to be there. Both Technical Assistance and Recognition Program need to be components of an incentives toolkit.
- Some incentives are structural, some are funding, and some are technical assistance—the components should be integrated. Technical Assistance needs to be integrated in whatever we do. We need to figure out what the game changer is that drives change, then what fills out program and provides needed components. Other incentives are game changers, so technical assistance is needed differently.
- Since both districts are at the top—to increase rate at Conservation District, we have to go to state legislature – what are chances of that happening? There has been interest in doing that, potentially for Snohomish, Pierce and Spokane counties. One aspect is getting more money through rate system, but would Conservation District be the one to do the technical assistance – could be another approach to do pilot. Some things the district would have to hire out for, but base technical assistance and education could be provided by Conservation District.
- Three legged stool – funding, taxation, permitting/assistance. All have value and are needed.
- The way we've proposed it, the PBRs is an alternative that is covered by similar options of Conservation District and Beach Protection District by the way we're trying to fund them. They are similar, and because we are chasing the first two, PBRs becomes lesser choice. The overlapping piece in PBRs that other two don't have: it is a tax reduction not tax increase, and can be put into perpetuity. Beach Protection District would be smaller scale. Conservation District would provide way to get technical things. PBRs is more specific flavor of tax reduction for restoration.
- Tax reduction exists but isn't used much. Since you don't have existing PBRs you can craft it from ground up. It wouldn't just be shorelines; it could be many different things, county-wide. It would be a lot of work.
- Local award funding is a unique creative way to find success that would identify homeowners quickly.
- Participants were not clear on whether PBRs would just be for marine shoreline or the entire county.

Attachment 1: Workshop Agenda

Snohomish County Incentives Workshop
July 2, 2014, 12-2 pm
Snohomish County Campus, Admin E Building
6th Floor, Conference Room # 6A02

NOTE: Lunch is included

AGENDA

- Introductions
- Project Overview – Kathleen Herrmann
- Summary of recent DNR/WDFW social marketing study/barriers specific to Snohomish County – Heather Trim
- Discussion of narrowed list of potential incentives, followed by process to narrow ideas to 3-4 to move forward – Kathleen Herrmann
- Next steps

Attachment 2: Presentation 1 (DNR/WDFW social marketing study/barriers specific to Snohomish County)



DNR/WDFW social marketing study/barriers specific to Snohomish County

Hisather Trim, Futurewise
July 2, 2014



Social Marketing to Reduce Shoreline Armoring

Prepared for WA Department of Fish and Wildlife and WA State Department of Natural Resources
Puget Sound Marine & Nearshore Grant Program

April 2014



Goal

Create a social marketing behavior change strategy that will lead to residential landowners changing their shoreline armoring-related behaviors.

- Identify target audience
- Identify behaviors to target
- Evaluate barriers and motivations
- Develop strategies



General distribution of shoreline parcels Sound-wide

57% of Puget Sound is residential property

County	Number of parcels	Shore length in mi	% of parcels Sound-wide	Min length in ft	Max length in ft	Mean length in ft
Clallam	991	46.1	2%	16	4,863	225
Island	5,831	136.9	13%	5	1,918	124
Jefferson	3,313	119.1	7%	6	4,979	190
King	3,463	69.2	8%	1	5,078	106
Kitsap	7,806	201.0	17%	4	6,544	136
Mason	5,584	157.2	12%	0	11,764	149
Pierce	5,156	141.5	11%	4	9,053	145
San Juan	4,408	182.3	10%	6	14,476	173
Snohomish	1,979	61.1	4%	2	5,828	168
Thurston	1,675	36.5	4%	4	3,204	115
Whatcom	2,663	82.1	6%	5	3,013	164
Whatcom	2,207	58.8	5%	4	4,810	141
Sound-wide	45,276	1,393.8	100%	0	33,476	163

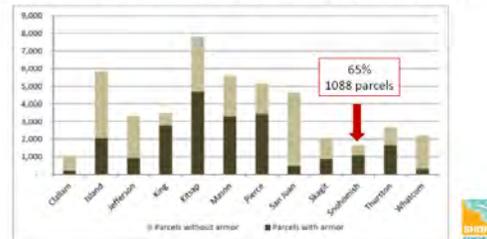
General distribution of shoreline parcels Sound-wide

57% of Puget Sound is residential property

Snohomish County	1,675 parcels
Government, Utilities and Railroads	126
Industries	1
Non-profit (churches)	2
Associations and other	47
Trusts and similar	183
Individuals	1316

Armored and Unarmored parcels

- 48% of all parcels were mapped as armored = 29% of shore length
- King, Kitsap, Pierce, Snohomish, Mason and Thurston Counties >50% armored
- Most unarmored parcels in Clallam, Island, Jefferson, San Juan and Whatcom



Forage fish spawning

- 26% of shoreline parcels, 58% of which are armored
- >50% of the parcels with forage fish spawn are armored in all counties but Clallam, Jefferson, San Juan and Whatcom Counties
- Thurston, Mason, Kitsap, and Island Counties have the most armored forage fish spawning habitat by length

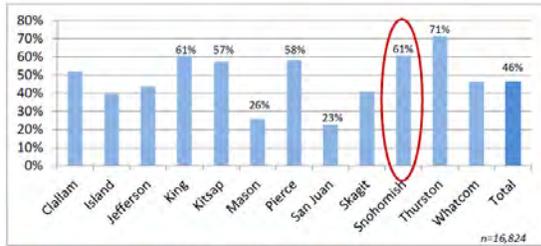


Snohomish Parcels in each segment

Armor Status	No Armor					Armor					TOTAL Armored segments	TOTAL All segments	ALL SEGGS %
	No Home		Home		TOTAL # segments	No Home		Home		TOTAL # segments			
	No Erosion Potential	Low-Med Erosion Potential	No Erosion Potential	Low-Med Erosion Potential		No Erosion Potential	Low-Med Erosion Potential	High Erosion Potential					
Owner type (all parcels)													
Government, Utilities and RR	0	126	0	0	126	0	0	0	0	0	0	126	7.5%
Industries	0	1	0	0	1	0	0	0	0	0	0	1	0.1%
Non-profit	0	2	0	0	2	0	0	0	0	0	0	2	0.1%
Associations and other	36	11	0	0	47	0	0	0	0	0	0	47	2.8%
Trusts and similar	0	1	0	0	1	0	0	0	158	24	182	183	10.9%
Individuals	0	70	39	301	410	9	164	30	703	24	906	1316	78.6%
TOTAL (# parcels)	36	211	39	301	587	9	164	30	861	24	1089	1675	
Length (feet)	5093	44248	3104	37272	89617	2411	21733	2075	74525	1358	103100	192739	
Length (miles)	1.0	8.4	0.6	7.1	17.0	0.5	4.1	0.6	14.1	0.3	15.5	36.5	



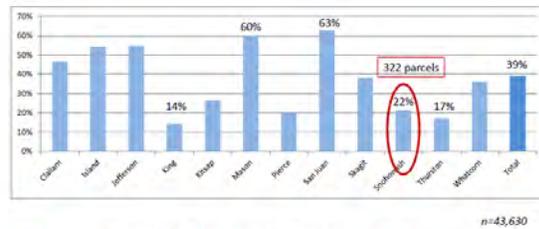
About 46% of the parcels with homes are owner occupied



Percentage owner occupied parcels

Parcels owned by individuals/trusts

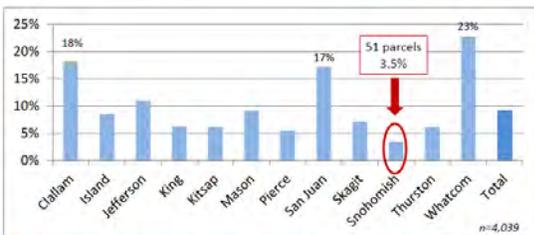
39% of parcels are owned by persons living outside of the county



Percentage of parcels owned out of county

Parcels owned by individuals/trusts

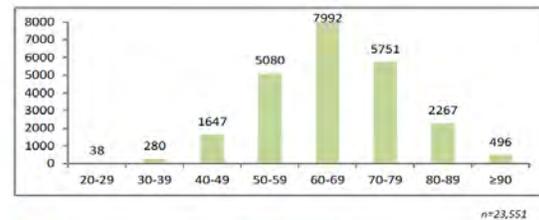
9% of parcels are owned by persons living outside of state/US



Percentage parcels owned by out of state owners

Parcels owned by individuals/trusts

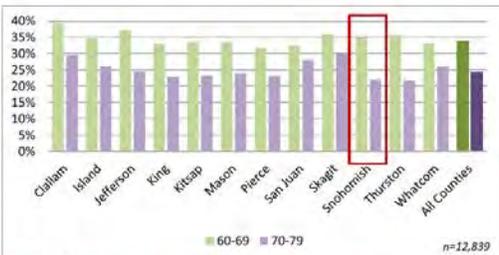
Shoreline property owners are seniors



Age of owners

Parcels owned by individuals

Shoreline property owners by county

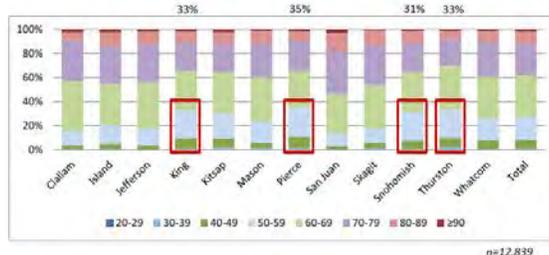


60-69 and 70-79 year old shoreline parcel owners

Parcels owned by individuals

Youngest owners (<60 years old)

owner occupied parcels



Parcel owner age distribution by parcel county

Parcels owned by individuals

Shoreline property owners are highly active voters

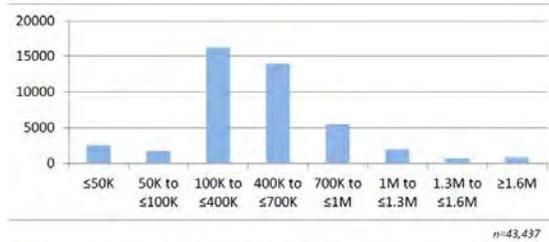
Shoreline parcel owner total n= 25,339, King County total n= 1,036,635, WA State total n= 5,779,208



Voting activity of currently registered voters

Current voters/Parcels owned by individuals

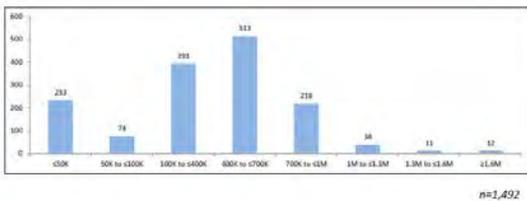
Value (land and improvements) of most parcels: \$100,000-\$700,000



Market value of improvements and land (total value)

Parcels owned by individuals/trusts

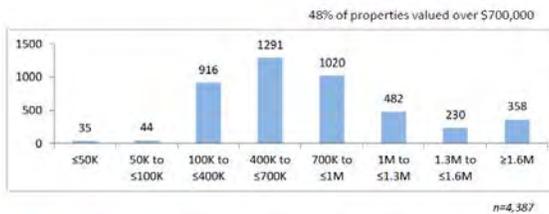
Value (land and improvements) of most parcels: Snohomish County



Market value of improvements and land (total value)

Parcels owned by individuals/trusts

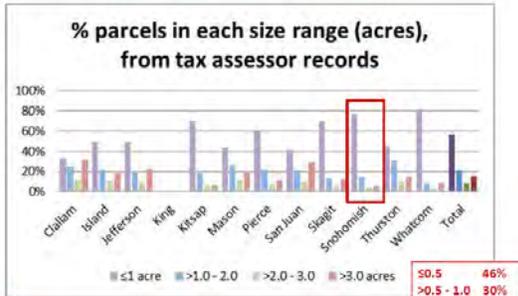
Value (land and improvements) of most parcels: San Juan County



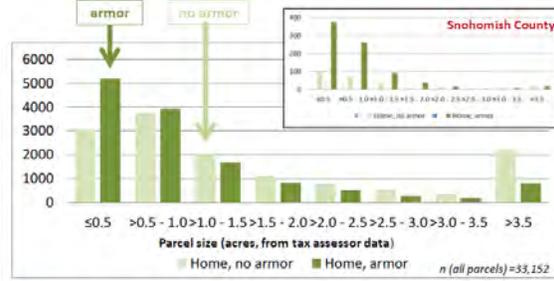
Market value of improvements and land (total value)

Parcels owned by individuals/trusts

Parcel size by counties



Smaller parcels (w/homes) are more likely to have armor than larger



Comparison of homes and armor with parcel size

Parcels owned by individuals/trusts

In sum, Snohomish Co parcels are...

- 1,675 parcels (residential category)
- 65% of parcels are armored
 - 14.7 miles = armored: home/low-mod erosion
 - 7.1 miles = unarmored: home/low-mod-high erosion
- 21% have forage fish spawning (58% of those are armored)
- 61% owner occupied
- 22% owners live outside county
- 31% are <60 years old (owner occupied parcels)
- 95% current voters active
- 60% have value of land/improvements in \$100-700K range
- 76% parcels less than or equal to 1 acre in size (46% <5 acres)
- If have home, more likely to have armor if ≤ 2 acres

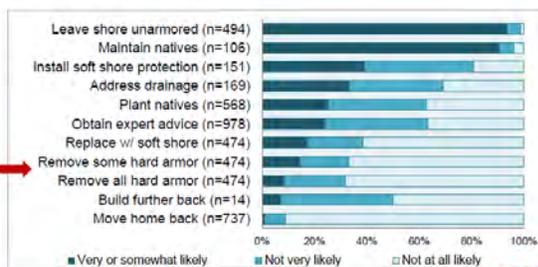


Survey of Owners (Puget Sound)

- Jan/Feb 2014
- 30% response rate
- Among 1,164 respondents:
 - ➔ Mostly male respondents (68%)
 - Most were retired (59%)
 - Most 65 years old or more (58%)
 - College degrees (81%)
 - Six figure incomes (41%)



Likelihood of behavior



Leaving shore unarmored

- Barriers
 - Substantial changes in erosion (59%)
 - Concerned that the property was not protected from erosion (55%)
 - Storms, waves or tides changing the shoreline dramatically (50%)
- Motivators
 - Being confident the property would be protected or enhanced by it (54%)
 - Enjoying the natural look of it (46%)
 - Providing healthy habitat for fish and wildlife (42%)

Removing/replacing armor

- **Barriers**
 - Concerned property would not be protected (61%)
 - Expense (54%)
 - Regulations and permitting making process difficult (28%)
- **Motivators**
 - Being confident the property would be protected or enhanced by it (60%)
 - Getting a tax break or reduced fees (28%)
 - Getting a loan or grant (25%)
 - Streamlined permitting and processes (21%)
 - Providing healthy habitat for fish and wildlife (16%)



Market opportunity

Primary behavior	# of parcels	% of parcels likely to engage	# of parcels likely to engage
Leave shore unarmored (unarmored parcels)	21,998	94%	20,678
Replace armor with engineered soft-shore protection	21,874	17%	3,719
Remove a portion of armor	21,874	14%	3,062
Remove all hard armor	21,874	8%	1,750



Recommended Toolkit



- **Assistance and Guidance** (website, free site visits, workshops)
- **Financial Incentives** (PBRS, tax incentives, grants, lower interest loans, group rates for neighborhoods)
- **Non-financial incentives** (shore friendly permit process, shore friendly ambassador)
- **Promotions** (marketing, tours, demonstration sites)
- **Influencer Tools** (contractor certification program, trainings, real estate broker programs)

Thank you





Snohomish Incentives Project Snohomish MRC

Kathleen Herrmann



Landowner Barriers to Armor Removal/Avoidance/Soft Shore

- Cost
- Don't want to be told what to do
- Unaware of alternatives to armor
- Unaware of why alternatives are needed
- Trust bulkheads (and bulkhead is already there)
- "We have always done it this way, why do we need to change anything?"
- First contact is usually with contractors
- Aesthetics (homeowners like a certain look)
- Permitting (time and cost)

1. Conservation District

Pros

- Has great reputation/credibility.
- Already works with landowners.
- Is sellable: Raising rate by \$1 more per year is feasible if tied to benefit gained.
- Has existing engineering resources/professionals that could be trained for this program.
- Has existing legal authority and flexibility to add to program and allocate funding.

Cons

- Might be difficult politically to raise rates. Recent rate increase was a bit of an effort.
- Mission is known to be about food production, horse, agriculture (not shoreline health).
- Might be perceived as duplication of services: residents are paying fees/taxes for lake district, flood, SWM, existing conservation district, which all seem to be for similar benefits.

2. Beach Protection District

Pros

- Has good nexus and transparency (tax payers would be closely related to the geographic area/issue involved).
- Can include broader issues such as sea level rise, spartina, water quality, shellfish, salmon health.
- Can capitalize on existing structures (organized homeowner groups)
- Is sellable: Call it "stewardship."
- Is more persuasive to the elected officials if residents come forward and say they want to tax themselves.

Cons

- Could be perceived as punitive, because it is a tax.
- Is a further form of fractionation of management (i.e., not countywide).
- Requires auditing.
- Needs additional staff resources.

3. Public Benefit Rating System (PBRs)

Pros

- Existing current use program is extensively used.
- Would likely be most used for bluff homes (larger lots with more room for restoration).
- Is appealing to real estate brokers and title companies. They want to find ways to promote properties.
- Can save county money in the long run.
- Would be good to try it to gather data.
- Would be good as part of incentives toolkit.

Cons

- Could be difficult to make PBRs applicable for thin linear feature (i.e., armor).
- Need to look at size of parcels to determine if it would be worthwhile.
- Existing program is not working so well (have not been checking to ensure accurate use of land).
- Will shift tax burden.
- Takes a big time commitment. Takes resources to administer.
- May not result in perpetual conservation easements.

4. Tax Reduction for Restoration Improvements

Pros

- Provides tax benefit for taking action.
- Is sellable: "Anything that govt can do to reduce taxes helps."
- Could likely result in permanence (need to ensure that).
- Could include a stewardship component.

Cons

- May not be a large value because properties are relatively small.
- Would take a champion (elected official) to get passed.
- Might create a tax burden for others or other needs.

5. Offering Local Award Funding

Pros

- Would be good as part of package with technical assistance.
- Have model: Stilly CWD has a discretionary fund that funds water quality for shellfish.
- Has potential to incentivize neighbors to address issue at a larger scale.
- Would need to market it in an attractive way.

Cons

- Need to capitalize it.
- Not sure if \$5000 per person would be enough.
- If use stormwater fee, fund has many other priorities and there could be nexus issues.
- Have to be careful of "gift of public funds."

Specific Ideas: Local Award Funding

Local award funding has the potential to incentivize neighbors working together to remove armor, instead of doing it one landowner at a time.

- Could structure the program so that if five neighbors apply, the county would pay for 50%, but if single landowners apply the county only pays 25%.
- Alternatively, higher scores could be awarded if working together (the more applicants working together, the higher they rank).

6. Lower Interest Loans

Pros

- Would be good as part of incentives toolkit.
- Have models: historic rehab program, new septic program.
- These programs have been popular.
- Would have relatively low cost to the county.
- Would be used by a certain group of people (don't have the cash upfront).

Cons

- Would involve significant paperwork for landowner.
- Has potential challenge with permits. Would they loan the money for the permits and process? There is no assurance that the permit would get approved.
- May not be as motivating as septic replacement (i.e., something you HAVE to do).
- Would likely have some % of foreclosures.

Specific Ideas: Lower Interest Loans

- Existing investment model: Could form a nonprofit with one of the above funding streams (like a Beach District).
- Existing onsite septic low interest loan program: County received \$400K grant to create program modeled after energy efficiency. The grant money guarantees the loan. Potentially, this program could be expanded to include armoring.

7. Technical Assistance/Education

Pros

- Has willing audience. People are receptive to finding out what to do. They want the info, so they can make informed decisions.
- Fills gap (lack of knowledge).
- Helps open the door.
- Is needed in order to effect change ("Landowners are not going to change unless you provide this").
- Fulfills critical role for government (providing assistance related to regulatory function).

Cons

- Has challenge of gaining participation by non-receptive landowners.
- Has challenge of reaching and successfully persuading summer residents (their perception of their property is different than the year-round residents).
- Need to make sure that it is not duplicating other efforts (who is doing what...).
- Need to have defined and strategic outcomes.

Specific Ideas: Tech Assistance/Ed

- Would great to include training for the permitting staff.
- Demonstration sites/model sites like Low impact development.
 - County supported restoration = 5 year agreement for site visits.
- Need for training and licensing of contractors.

8. Recognition/Award/Certification Programs

Pros

- Capitalizes on people's desire to be recognized when they do good work.
- Is good way to get the word out: "It wasn't that hard."
- Have models: Sound Horsekeeping Program.
- Helps with curb appeal.
- Could be expanded to include whole site (home and property).
- Would be good as part of incentives toolkit.

Cons

- Not a decision-changer for people.
- Not necessarily a motivator for this population (which is being pushed more by market conditions).
- Might be discontinued when the home changes over to new owner.
- Could be perceived as "fluffy" or meaningless.

9. Permit Process Streamlining/Waiving Fees

Pros

- Likely popular with homeowners.
- Could help makes process easy and less costly (and time is money).
- Could help with the problem that soft shore alternatives are currently getting MORE scrutiny than those using old methods.
- Could do hybrid approach that uses pre-approved plans.

Cons

- Would be difficult to sustain (general fund too tight for reduced fees). Permit staff is fee supported.
- Could get resistance by development community who would have to pay higher fee and who are expecting service.
- Still have to wait for the state and other permits.
- Could be difficult to define (What is green?)
- Currently, numerous applicants claim they should be a priority (schools).

Specific Ideas: Permit streamlining

- Tiered fees. If project is 100% green, get full fee reduction, if 75%, less reduction, etc.
- Have model: County currently has pre-approved plan (retaining wall) which is quickly approved.
- Could combine technical assistance with pre-approved plans. Then landowner just has to go through just 1 permit cycle rather than 3-4 cycles.
- Could create a construct for a larger effort, on a reach or drift cell scale, that involves technical assistance (geotech, reach-scale design, etc.).

Other ideas: Packaged Proactive Funding

- Could be done as a private-public partnership with private foundations to create fund. This approach has been done to provide technical assistance and digesters for farmers in the county.
 - Can we find the right partnering organizations in the county?
 - Could the county accept having a private contractor to do something?

Ideas that got two "votes"

- Shellfish Protection District
- Federal Tax Credit
- Tax Incentive for Donation/Conservation Easement
- Grant awards

Ranking Exercise

1. Conservation District
2. Beach Protection District
3. Public Benefit Rating System (PBRs)
4. Tax Reduction for Restoration Improvements
5. Offering Local Award Funding
6. Lower Interest Loans
7. Technical Assistance/Education
8. Recognition/Award/Certification Programs
9. Permit Process Streamlining/Waiving Fees