



Management Planning for Nature Conservation Sites – Core Principles

In 2008 the Conservation Management Consortium (CMSC) recognised a need to review the variety of current management planning protocols and identify core management planning principles that should be applied to any conservation management plan. The CMSC organised a workshop '*Establishing and Confirming Management Planning Principles on Natura 2000 and Other Conservation Sites*'. This was held from 30 September to 2 October 2008 at Plas Tan Y Bwlch, the Snowdonia National Park Study Centre in North Wales, UK.

The following statement outlines the core principles, identified during the workshop that should be applied when preparing a management plan for nature conservation, and in particular European Natura 2000 and Ramsar, sites. The statement was prepared and endorsed by the following participants who attended the final drafting session of the workshop:

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List of participants in final session:

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Core Management Planning Principles

1. General principles

- Ideally, there should be one comprehensive plan for multi designation sites.
- In addition to planning the management of nature conservation features, plans should also consider stakeholder interests, cultural aspects (including historical, archaeological, religious and spiritual interests), visitor management / tourism, education and interpretation, and social and economic aspects.
- The precautionary principle is important in the context of conservation management and planning. It should guide the planning process and influence the way in which we manage sites, habitats and species.
- Planners should recognise the need to integrate conservation site planning with wider sectorial and land use plans
- The planning approach should be as uncomplicated as possible (the simpler the better).
- A management plan should be as large as the site requires and no larger.
- Corporate support for the planning process is essential, and this should include a formal approval process.
- Management plans should be easily understood by everyone who has an interest in the site. This will include people who do not have a scientific or technical background. The language used in the plan should, whenever possible, be plain and accessible to all.
- Plans, and in particular plans for large, complex sites, should include a summary. These can be presented as text, but the addition of annotated maps and illustrations will help to explain issues
- Individuals involved in managing a site should, whenever possible, have an involvement in the planning process and, in all cases, ownership of the plan

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2. Stakeholder involvement

Conservation managers must recognise the need to adopt an inclusive approach which takes account of the interests of all stakeholders and, as far as possible, encourages their involvement in all appropriate aspects of management planning and site management. One of the key issues when building and maintaining successful relationships is to have a shared appreciation of what can and cannot be negotiated. For example, on European (Natura 2000) sites there will be legal obligations in respect of the wildlife features. Managers will have no choice but to ensure that the features are managed to obtain and maintain Favourable Conservation Status. The current Ramsar guidelines recommend that features on Ramsar sites should also be maintained at Favourable Conservation Status.

3. Management planning should be a continuous cyclical, iterative and developmental process (adaptive or adaptable)

'A process in which management activities are implemented in spite of uncertainties about their effects, the effects of management are measured and evaluated, and the results are applied to future decisions'. Elzinga et al. (2001)

- Monitoring must be recognised as an integral and essential component of any planning process. (*Monitoring: Surveillance undertaken to ensure that formulated standards are being maintained*)
- It is good practice to record all actions undertaken in accordance with a plan.
- Factors must be identified and integrated in the planning process.

(A factor is anything that has the potential to influence or change a feature, or to affect the way in which a feature is managed. These influences may exist, or have existed, at any time in the past, present or future. Factors can be natural or related to human activity in origin, and they can be internal (on-site) or external (off-site).)

- Plans and management actions should incorporate current best practice and be open to new and innovative ideas.
- Management should be reviewed continually within a time scale that is appropriate to the features. (Fragile and vulnerable habitats

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or populations will require more frequent attention than robust and secure features.)

- Internal management reviews should be supplemented with formal reviews at predetermined agreed dates. It may, in some cases, be appropriate to hold external reviews.

4. Information

Plans require a descriptive section which contains, or provides reference to, the information that will be **needed** to help decide what is important and to undertake the planning process. This is a collation exercise and is generally not dependent on the generation of new information. Further information requirements should be identified during the planning process.

5. Features should provide the focus for management planning

Management by defining conservation outcomes for features is a reflection of the legal requirement to protect specified features on statutory, and other, sites. This is of particular relevance to Ramsar sites. The desired status for each feature is defined, and these are the **management objectives**.

6. Objectives

Objectives should lie at the very heart of a management plan. They are the outcomes of management and the single most important component of any plan. An objective is the description of something that we want to achieve. Wildlife outcomes are habitats, communities or populations (features) at Favourable Conservation Status.

SMART objectives, as generally applied to business, can, with modifications, be applied to wildlife objectives:

- S** Objectives for conservation features must **S**pecifically address the feature.
- M** Objectives for conservation features must be quantified and **M**easurable.

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- A** Objectives can be **Achievable** or **Aspirational**.
- R** Objectives must be **Relevant** to, and written in compliance with, the strategies, policies and legal obligations that govern the organisation responsible for managing the site or feature.
- T** Objectives for nature conservation management can be **Time-based**. However, we may also recognise that our commitment to nature should be endless and not time-based. Conservation management is concerned with obtaining the status that we require and thereafter maintaining that status. Objectives will always have a start date but we may not believe that it is always appropriate to specify a completion date.

Objectives should, when appropriate, take account of natural and other processes.

For all Ramsar, Natura 2000, and most other, sites, conservation objectives should take account of the need to obtain **Favourable Conservation Status (FCS)** for the wildlife features. It is the management objective that provides the site specific definition of FCS for each feature.

7. The action plan

All plans should contain a costed action plan which identifies all the resource requirements. The action plan should:

- Identify and cost all the activities required to obtain and maintain features at Favourable Conservation Status. Objectives for conservation features must not be diminished to accommodate a shortfall of resources. An objective should be an expression of the legal and moral obligations towards features on sites.
- Identify priorities for all management activities.
- Identify all individuals or organisations who will be responsible for implementing the activities.
- Identify realistic, achievable and effective management actions.

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8. Finally

- A record should be kept of all the individuals engaged, at any level, in preparing the plan.
- All consultees and advisors, individual and corporate, should be acknowledged in the plan.
- The plan should contain a glossary of terms.
- Plans must be implemented

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Glossary

Action plan	A plan of action for a specific period of time containing several individual projects that describe specific actions. The information contained in the individual projects is aggregated to produce a wide variety of work and resource plans.
Adaptable / Adaptive Management	A cyclical, adaptable management process which allows site management to: respond to natural dynamic processes; accommodate the legitimate interests of others; adapt to the ever-changing political and socio-economic climate; and, in the long term, succeed, despite uncertain and variable resources.
Attribute	An attribute is a characteristic of a feature that can be monitored to provide evidence about the condition of the feature.
Audit	A critical examination of the performance of the plan, or a part of the plan, so as to measure the quality of the plan and its implementation, carried out by the management organisation (internal audit) or by an independent authority not directly associated with the site (external audit), usually at the invitation of the management organisation.
Evaluation	Evaluation is simply the means of identifying, or confirming, which of the features on a site should become the focus for the remainder of the planning process.
Factor	A factor is anything that has the potential to influence or change a feature, or to affect the way in which a feature is managed. These influences may exist, or have existed, at any time in the past, present or future. Factors can be natural or anthropogenic in origin, and they can be internal (on-site) or external (off-site).
Favourable Conservation Status (FCS)	FCS is the desired status of a habitat or species, at any geographical scale from its entire geographical range to a defined area within a site. Although the concept of FCS originates in international and European treaties and directives, it is a concept that can be used for any wildlife management plan anywhere.
Feature	Nature conservation features can be a habitat, a community or a population. Other features of interest can include geological, geomorphological, archaeological and historical features.

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IUCN Protected Area

An area of land and/or sea especially dedicated to the protection and maintenance of biological diversity, and of natural and associated cultural resources, and managed through legal or other effective means. (Protected areas are categorised according to their primary management objective.)

The IUCN Protected Area Management Categories:

Ia: Strict nature reserve/wilderness protection area managed mainly for science or wilderness protection

Ib: Wilderness area: protected area managed mainly for wilderness protection

II: National park: protected area managed mainly for ecosystem protection and recreation

III: Natural monument: protected area managed mainly for conservation of specific natural features

IV: Habitat/Species Management Area: protected area managed mainly for conservation through management intervention

V: Protected Landscape/Seascape: protected area managed mainly for landscape/seascape conservation or recreation

VI: Managed Resource Protected Area: protected area managed mainly for the sustainable use of natural resources

Management

Management is about taking control to achieve a desired outcome. 'Control' does not necessarily imply taking an action. It can, for example, mean 'enabling' a process.

Monitoring

Surveillance undertaken to ensure that formulated standards are being maintained

Precautionary Principle

Where there are threats of serious or irreversible damage, lack of full scientific certainty shall not be used as a reason for postponing cost-effective measures to prevent environmental degradation.

Rationale

The rationale is the process of identifying, in outline, the most appropriate management for the various site features.

Recording

Making a permanent and accessible record of significant activities (including management), events and anything else that has relevance to the site.

Site

A site is the area covered by a management plan. It can vary in size from less than a hectare to a large National Park covering many square kilometres. The term is used synonymously with area.

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Specified Limits	Specified limits define the degree to which the value of a performance indicator is allowed to fluctuate without creating any cause for concern.
Stakeholder	A stakeholder is any individual, group, or community living within the influence of the site or likely to be affected by a management decision or action, and any individual, group or community likely to influence the management of the site.
Surveillance	Making repeated standardised surveys in order that change can be detected.
Survey	Making a single observation to measure and record something.
Zones	Sites may be divided into zones to meet a wide variety of purposes, for example, to describe management actions or to guide or control a number of activities.

References

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