

Developing a Conservation Plan:

A Basic Guide for Land Trusts

INTRODUCTION

This brief guide is intended to help land trusts design and complete a conservation plan for their geographic area of interest, while keeping the effects of a changing climate in mind.

CONSERVATION PLANNING IS...

“...the process of locating, configuring, implementing and maintaining areas that are managed to promote the persistence of biodiversity and other natural values.”^[1]

Some conservation planning processes also include consideration of cultural, historic and community resources, such as archaeological sites, historic sites, walking and biking trails, drinking water resources, open spaces, view sheds, etc. The resulting conservation plans vary widely in their scope, depending on their purpose and the capacity available to develop them. Land trusts are beginning to integrate the effects of climate change into conservation planning, in order to conserve habitats that will support healthy fish, wildlife and plant populations, and resilient ecosystem functions in a changing climate.



THE PURPOSE OF CONSERVATION PLANNING IS...

...to identify and more effectively conserve land that is most important to achieving a land trust's mission. Conservation planning can help your land trust:

- **Increase the pace of the land conservation process**
- **Streamline the decision making process**
- **Protect more land**
- **Initiate strategic land acquisition choices**
- **Conserve healthy habitats that could persevere in a changing climate**
- **Say YES or NO to arising opportunities**
- **Make informed decisions**
- **Reduce crisis management**
- **Increase fundraising potential**



[1] Robert Pressey et al, *Conservation Planning in a Changing World* (Trends in Ecology and Evolution 22(11), 2007), 583-92.

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GETTING STARTED: 9 STEPS

1. **Mission and goals:** Review your land trust's mission and goals to help frame your conservation planning approach. Land trusts vary in their degree of emphasis on protection of nature, protection of historic, cultural and community resources, and access to and enjoyment of protected areas.
2. **Geographic area:** Identify the geographic area to be included in your conservation plan.
3. **Purposes and priorities:** Establish specific priorities for your conservation planning. Is this strictly a plan to guide your land trust's internal land acquisition decision making or is it for other purposes, such as to meet certain grant guidelines; collaborate with other land trusts and conservation agencies; encourage careful land owner stewardship; influence public policy, etc.?
4. **Timeline and budget:** Estimate how much time and money your land trust can dedicate to the process as well as to the product.
5. **The final product:** Decide how technical or elaborate the plan will be. Will it be a simple description of your land trust's land protection priorities, or a low-tech map or series of maps, or a more extensive, high-tech series of geographic information system (GIS) computer-generated maps that can be interchangeably layered and compared, and easily updated?
6. **Who will participate:** Clarify who will participate in developing the plan and who will have access to the completed plan. Is the process and product just for your land trust? Or are there partner organizations or agencies or others that you want to include?
7. **Implementation team:** Determine your conservation planning leadership and participation process. Which individual/s or entities will play a lead role, a hands-on role, an advisory role, a decision making role? How will decisions be made?
8. **Access to the plan:** Will the plan be an internal document accessible only to your land trust board and staff or will it be shared with your members, or with partner organizations or agencies, or even with the wider public?
9. **Initial team meeting:** Organize and hold an initial plan development team meeting to discuss and make decisions regarding these 9 Steps for Getting Started.



GATHERING THE DATA

- Locate any existing conservation plans or mapping and planning data for your area (from other land trusts or conservation groups, municipalities or regional districts, provincial agencies, federal agencies, universities, etc.).
- Analyze those plans and their mapping and planning data; access their resources if applicable; develop and sign data-sharing agreements where necessary.
- Draft an initial list of further information to gather (data layers).
- Discuss/refine the data gathering strategy with your team, taking care to be realistic and not become overwhelmed with too much or unnecessary data.
- Gather initial data layers and information.

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DATA OPTIONS AND CONSIDERATIONS

The following includes a comprehensive list of potential data and planning considerations that could be included in your conservation plan. Each land trust will have unique needs and priorities and may include some or all of the following, as well as additional information relevant to a particular land trust.

1. Protected areas:

- Local, regional, provincial, national and First Nations parks, ecological reserves, special management areas and other protected areas
- Internationally protected or designated areas, such as Biosphere Reserves, Important Bird Areas, Ramsar wetlands, etc.
- Nature reserves and conservation covenants held by land trusts and other entities
- Crown (provincially managed) lands that provide varying levels of protection
- Local zoning that protects certain areas or habitats, such as streams, lakes, wetlands, shorelines, steep slopes, etc.

2. Geodiversity:

- Geology
- Soils

3. Landform diversity:

- Elevation gradient
- Slope
- Aspect (areas of least and most solar gain)

4. Biological conditions:

- Sensitive or rare ecosystems (delineating vegetative cover types): cliff, freshwater, herbaceous, old and mature forest, riparian, wetland, woodland, etc.
- Watersheds, water bodies (streams, lakes, wetlands, ponds) and floodplains
- Barriers on streams (dams, diversions)
- Current and potential future ecosystem conversion (lots and zoning: currently developed areas and build-out potential, roads, impervious surfaces, industrial sites, gravel pits, waste dumps and contaminated sites, mines, deforested areas, Private Managed Forest Lands (PMFL), Agricultural Land Reserve (ALR) lands and other agricultural areas, areas of erosion, and sedimentation, areas of invasive alien and problematic native species, First Nations reserves and lands owned/managed under signed treaty that have no formal or legal protection, etc.)
- Shorelines (for lands adjoining marine areas): estuaries, eelgrass habitat, forage fish spawning beaches, sand ecosystems, etc.
- Islets/small islands

5. Biodiversity:

- Known species habitats (plants, mammals, reptiles, amphibians, birds, invertebrates, fish)
- Rare species habitats (provincially, federally or internationally designated)

6. Climate conditions:

- Predictions for seasonal and annual changes in precipitation
- Predictions for seasonal and annual changes in temperature
- Predictions for changes in frost-free days
- Predictions for sea level rise

7. Connectedness:

- Regional connectedness (for species that can move on wind or water, or species transported with humans)
- Physical connectedness (watersheds, land parcels, parcel ownership, protected lands)
- Large current or potential protected areas
- Umbrella species habitats (for species whose habitats support many other species' habitats)
- Barriers to species movement (roads, fences, settlements, elevation, water)



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8. Cultural and community interests:

- Known archaeological sites
- Historic places
- Walking and biking trails
- Open spaces
- View sheds
- Beaches and swimming and boating access
- Drinking water protection and other ecological services important to the community

INTEGRATING AND REFINING THE DATA

- Gather advisory team to discuss in-hand data, data gaps and arising questions
- Develop draft criteria to identify priority lands and areas for conservation
- Identify priority data and mapping layers
- Identify any further data gathering, integration and mapping steps

REFINING THE PROCESS, DEVELOPING YOUR DRAFT CONSERVATION PLAN

- Gather any additional data
- Refine and integrate mapping layers (spatial analysis)
- Refine land protection criteria
- Identify conservation priority areas and lands to be included in the plan
- Complete draft conservation plan and any associated documents
- Develop policy and communication plan regarding use of, publicity about and access to the plan
- Gather advisory team to discuss the draft conservation plan, land protection criteria, priority areas and lands, acquisition decision making process and documents, policy re: access/use/publicity and draft communication plan

COMPLETING AND IMPLEMENTING YOUR CONSERVATION PLAN

- Refine, complete and adopt conservation plan, including ongoing implementation strategy
- Develop land acquisition decision making process and documents^[2]
- Identify those responsible to implement the plan
- Confirm potential ongoing partners, communication strategy and ongoing implementation
- Gather and refine land owner contact information for priority areas and lands
- Consider what conservation approach might be most effective with each priority land owner (e.g. land donation, land purchase, conservation covenant, stewardship agreement)
- Develop and implement communication strategy
- Develop land owner contact strategy and implement
- Identify timeline for periodic review, evaluation and updating of the conservation plan
- CELEBRATE!

[2] See Canadian Land Trust Standards and Practices 2019; Standard 8 - Evaluating and Selecting Conservation Projects, pp. 13-14; Canadian Land Trust Alliance.

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CONSERVATION PLANNING SUMMARY CHECKLIST:


- ☐ Review your land trust's mission and goals to guide your planning approach
- ☐ Identify the geographic area for your plan
- ☐ Clarify the key purposes of and priorities for your plan
- ☐ Develop a timeline and budget for the planning process
- ☐ Arrive at a vision of the final product
- ☐ Identify who will develop the plan and how decisions will be made
- ☐ Consider who will have access to the completed plan
- ☐ Hold team meeting to initiate the process, clarify roles and decision making
- ☐ Gather and analyze relevant conservation plans for your geographic area
- ☐ Develop an initial list of desired data layers and discuss with your team
- ☐ Gather and evaluate initial data layers and information
- ☐ Develop draft criteria to identify priority conservation areas and lands
- ☐ Identify priority data and mapping layers and further data needs
- ☐ Gather any additional data
- ☐ Consider, prioritize and integrate the data into mapping layers
- ☐ Refine criteria for priority conservation areas and lands and identify those places
- ☐ Complete your draft conservation plan
- ☐ Develop policy and communication plan for use of, publicity about and access to your conservation plan
- ☐ Discuss, refine and adopt your conservation plan and communication plan
- ☐ Develop decision documents for your land acquisition process
- ☐ Identify those responsible for ongoing implementation
- ☐ Gather and refine contact information for owners of priority lands
- ☐ Consider the best conservation approaches for priority lands and their owners
- ☐ Set timeline to review, evaluate and update your plan
- ☐ Implement your conservation plan and communication plan
- ☐ CELEBRATE YOUR SUCCESS!

FOR MORE INFORMATION

An excellent, in-depth 312-page handbook (*Strategic Conservation Planning*) is available by contacting the Land Trust Alliance of British Columbia office or for a minor fee on the US Land Trust Alliance website:

www.landtrustalliance.org

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