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## **1 INTRODUCTION AND OVERVIEW**

A management plan is a guideline for people responsible for the management of the conservancy to ensure that the objectives & goals of area are achieved. It is a guide for natural resource protection, management, development & interpretation of the conservancy. The management plan also combines objectives specific to the area with a thorough knowledge of the specific resources & values.

### **1.1 If there is no management plan, the likely outcomes are:**

- Management is a series of uncoordinated reactions to problems.
- Actions are subjected to particular preferences likes & dislikes of management at the time.
- Actions may not be in the interest of the conservancy.
- Cumulative result of a series of unguided management actions can be irreversible and even harmful.
- In contrast, when a plan is available, there is continuity and consistency of management direction even if perceptions, background & opinions of individuals differ- if there is a management change, the plan will guide the new management.

### **1.2 What is the planning process?**

Thinking ahead about the purposes of conservation management and finding the best method of attaining them.

### **1.3 What are the benefits of having a of management plan?**

- The plan serves as the conservancy committee's guide and reference book- a guideline for what needs to be

done, where it needs to be done- a useful, practical and dynamic document, continually revised- it is important that the plan must be continuously revised.

- The plan is primarily prepared for the conservancy committee. The plan will inform the relevant provincial nature conservation authorities about the conservancy management and forms a baseline to check on progress of members. Authorities and conservancy members cannot impose their personal whims on the conservancy committee.
- The plan must provide information about conservancy management to the conservancy members, the general public, local communities, politicians etc.

#### **1.4 What are the main items in the management plan?**

***Background information-*** Information on the conservancy and surrounding area, geology and soils, vegetation, wildlife, surrounding communities, history of the area and the conservancy- this information must be accessible in any practical format to the conservancy committee.

Maps form part of the background information- natural resource maps of topography, geology, soils, vegetation, slope, drainages, conservancy zonation, wildlife distribution, soil erosion systems, road systems, etc.

***Daily use document:*** The plan itself. All the other items noted are actually reference material which should be handy.

***Techniques and procedures:*** The 'daily use' plan includes hands-on methods to be used when tackling a project- a variety of management actions and methods for achieving goals.

## **2 METHODOLOGY OF DRAWING UP A MANAGEMENT PLAN**

### **2.1 Who draws up the plan?**

The planning committee, consisting typically of:

- Selected members of the conservancy management committee.
- Representative(s) from the relevant provincial nature conservation authorities and associations.
- Scientific/professional staff- botanists, zoologists, ornithologists, entomologists, veterinarians, ecologists.
- Any other experts.
- Representative of the conservancy's own community.
- Representatives of the local community next to the conservancy.

### **2.2 How is the plan drawn up?**

- Form the planning committee.
- Select a convenor, who will be responsible for plan production.
- Jointly decide on plan, or modify an existing plan to suit.
- Outside experts can do sections within their areas of expertise.

### **2.3 When and how often is the plan drawn up?**

Ideally the plan is drawn up before any development or management takes place- development & management must be guided by the plan to be done in the most acceptable way, based on sensitivity and sustainability of natural resources in the conservancy.

The first management action for a new conservancy management committee is drawing up of the plan

If a plan is drawn up after the fact, a number of problems can be experienced, which is discussed in more details in Section 2.4.

Planning is a dynamic process- an initial plan for the first 5 years, thereafter the plan is annually reviewed and updated every 5 years, and it must be flexible inside the 5 years.

### **2.4 What are the problems experienced when a plan is drawn up after a conservancy is established?**

Costly infrastructure may have been established in areas either too sensitive or too impractical for location of permanent structures.

Irreversible ecological damage may have taken place due to ill-advised and unplanned management actions- typically roads which are poorly sited, causing soil erosion and negative impact on sensitive habitats, as well as buildings sited with no regard for the aesthetics of the area.

### **2.5 Who approves of the plan?**

The final draft is submitted by the planning committee to the conservancy committee and the relevant authorities.

When approved by the conservancy committee it becomes the sole formal guide to conservancy management.

The surrounding community should agree to the plan via consultation during the early stages of plan development, not after the fact.

The conservancy committee now has a useful guide for work but also the responsibility to implement the plan according to the procedures & directives in the plan.

### **3 INVOLVEMENT OF THE PUBLIC:**

It is imperative to involve the surrounding communities from the start, with establishment of objectives or by getting their opinion on objectives before finalisation.

#### **3.1 Reasons for public involvement:**

- Better chance of gaining recognition, relevance & acceptability with communities coming into contact with conservancies or being surrounded by conservancies.
- The conservancy committee gains insight into needs of communities, especially those deprived of basic resources.
- The conservancy gets an opportunity to build strong relationships with community stakeholders.
- The public gets a feeling of ownership of the conservancy and they see it as their own.
- Developments on conservancies, especially if it has social and or economic impacts on the communities must be discussed with accredited representatives of the communities before any final decisions are made-developments must be analysed for its impact on the community.

#### **3.2 Pitfalls in public participation:**

- It can be time consuming and expensive, especially due to the number of people involved.
- Creation of expectations before the conservancy committee can meet them- don't make promises!

- The wrong management approach- token consultation when the decision is already taken.

**3.3 Professionalism in public involvement and management style:**

- Focus on the real objective, namely to conserve the area for the future generations.
- The inputs to the plan requiring expert conservation information, typically objectives for conservation, zonation for conservation and utilization, must be determined before the plan is submitted to the consultation process for comment.
- The management style must be suitable for the situation.
- The conservancy management committee must find a way to handle communities who come to the forum with “old” grievances and issues.

## **4 OBJECTIVES & GOALS**

### **4.1 Objectives:**

An objective is a broad general statement of what must be achieved on a particular conservancy, a statement of direction that the conservancy committee must follow.

Objectives can be divided into primary and secondary objectives- primary objectives are the most important, and everything else proposed must be compatible with primary objective; objectives cannot clash with or contradict each other.

#### **4.1.1 The main characteristics of objectives are:**

- Objectives broadly determine the general management direction.
- Objectives must be clear and easily understood.
- Objectives are specific to a particular conservancy.
- Objectives are consistent with the policies and objectives of the relevant provincial nature conservation authorities and associations.
- Objectives must cover the most important conservancy management aspects.
- Objectives must be agreed to by all.
- Objectives do not have a limited time frame.
- Objectives cannot be measured.

## **4.2 Goals:**

Goals are specific routes that must be taken to head in the desired direction. Goals are used to achieve objectives, the actual “get out and do” part of the management plan.

### **4.2.1 The main characteristics of goals are:**

- Goals must be specific and say EXACTLY what must be done.
- Goals must be such that it is possible to measure progress and success.
- Goals must be achievable.
- Goals must be reasonable, within the ability and resources of the management.
- Goals must be time targeted, goal x must be achieved by date y.

## **5 MANAGEMENT PROGRAMMES**

In order to reach a management goal, a number of management programmes may be required.

Typical programmes are given below. These programmes relate to different “topics” in environmental science/conservation biology, and generally experts will be consulted regarding these programmes.

### **5.1 Typical programmes:**

- Vegetation management programme.
- Wildlife management programme.
- Substrate (soil) management programme.
- Fire management programme.
- Water management programme.
- Cultural/historical programme.
- Public utilization programme.
- Facilities & infrastructure management programme.
- Social responsibility programme.

## **6 MANAGEMENT STATEMENT-OBJECTIVES-GOALS- MANAGEMENT PROGRAMMES- PROJECTS**

The hands-on portion of the plan may have the following typical layout:

**Objectives:** A, B, C

**Goals:** Objective A has A1, A2, A3 etc

**Programmes:** Goal A1 has A1.1, A1.2, A1.3 etc

**Projects:** Programme A1.1 has A1.1.1, A1.1.2 etc

### **6.1 Typical examples:**

#### **6.1.1 Example 1:**

##### ***Objective A:***

Involve relevant individuals and communities in the ABC Conservancy management planning & implementation processes.

##### ***Goal A.1:***

Involve the relevant individuals and communities in the ABC Conservancy management planning process.

##### ***Programme A1.1***

Establish a representative advisory committee (part of the Social Responsibility Programme).

##### ***Project A1.1.1***

List the relevant individuals and communities who may assist with the ABC Conservancy management plan.

***Who is responsible for this action?*** The conservancy management committee chairman.

***When must the project be done?*** From 15 March 2003 to 19 March 2003.

***How must the project be done?***

- Draw up a list from memory
- Draw up a list from files
- Get input from conservancy members
- Get input from the provincial nature conservation authorities and associations.

***What equipment is needed?*** Pen & paper, telephone, transport to meetings with members of the provincial nature conservation authorities and associations.

***What materials are needed?***

***What is the cost of this project?***

***Project ref no:***

**6.1.2 Example 2: “Hands-on” example.**

***Objective B:***

Conserve a representative portion of highveld grassland biome

***Goal B.1:***

One goal can be to clear alien & invasive species by Dec 2005

***Programme B.1.1:***

Vegetation management for ABC Conservancy

***Project B.1.1.1:***

Alien species removal

***Who is responsible?***

Alien species subcommittee

***When must the project be done?***

July-Dec 2005

***How must the project be done?***

Identify and mark all alien vegetation with the help of the Tree Society and Botanical Society; also refer to the vegetation maps of Conservancy

- Obtain tools and poison
- Arrange for workers from neighbouring squatter camp

***What equipment is needed?***

- Axes, shears
- Tins & brushes for poison coating
- Safety equipment for workers
- Trailers to transport cut wood to squatter camp for use as firewood

***What materials are needed?***

Refer to equipment

***Cost of project:*** Equipment:

Wages:

***Project ref no:***

## **7 ZONATION:**

### **7.1 Definition:**

Zonation is the establishment of areas of the conservancy within which certain activities and development may or may not be permitted.

Zonation must be done before any site or development planning is done!

### **7.2 Typical zone categories:**

Wilderness zone (specific protection)

Extensive use zone (Light to moderate visitor zone)

Intensive use zone (camping, accommodation etc)

## **8 REVIEW AND UPDATE OF THE MANAGEMENT PLAN**

### **8.1 Why is a Review & Update of the management plan required?**

- To determine if the original objectives are being met and if new ones have to be added.
- Conservation management methods are continuously changing; new attitudes & developments within communities necessitates change.
- Accountability for the use of conservancy funds.

### **8.2 What must be reviewed?**

- The complete management plan content must be reviewed.
- The management plan format must be reviewed.
- All aspects must be reviewed and successes/failures identified.

### **8.3 When must the review be done?**

Every 5 years.

### **8.4 Who must do the review?**

The Conservancy planning committee who drew the plan up.

Experts & suitably experienced persons can assist in the review process.

Representatives of the neighbouring communities, especially if they are influenced by plan.

## **9 ANNUAL PLAN OF OPERATION (APO)**

The management plan specifies what must be done, where and how, but it does not specify exactly when in the working year it must be done, how many labourers are needed, what equipment and materials will be required and what the cost will be.

The APO addresses these items and serves as budget as well as detailed work programme for the year.

### **9.1 The APO typically contains:**

- A list of projects.
- Time schedule per project.
- Staff needed per project.
- Equipment needed per project.
- Materials needed per project.
- Transport needed per project.
- Cost estimate per project.

## 10 SUMMARY

The effective conservancy management plan will consist of the following:

- **Principal Management Statement** - Similar to a vision and mission statement but less confusing.
- **Administrative Background-** Good and complete Conservancy Resource information- contained in separate books/files/databases.
- Well thought out **Objectives & Goals.**
- **Zoning** of land & resources which gives meaning to the management objectives.
- Specific management **programmes and projects** for the management and utilisation of resources.
- A detailed **APO** for the current year.
- Regular **review cycle** for review of objectives and progress.

A typical plan can be divided into three sections, here called "books". It might be files, a filing cabinet, electronic database- whichever format works best! The most important is to make a start on compilation of the information and to make it accessible to all conservancy members.

The three sections are:

- **Book 1:** The "**DATA BOOK**", containing the Conservancy information;

**Guidelines for Conservancy Management Planning**  
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- **Book 2:** The “*STRATEGY BOOK*”, containing the Management Plan
- **Book 3:** The “*ACTION BOOK*” containing the Annual Plan of Operation.

**Book 1** contains all the administrative, ecological, conservation and cultural information pertaining to the conservancy and its immediate surrounds.

**Book 2** contains all the strategic information which will guide management of the conservancy for the next period, typically 5 years.

**Book 3** contains the day-to-day hands-on practical information for work to be done during the year. A number of the projects on Book 3 will be related to obtaining information to compile Book 1.

A pro-forma management plan, showing the typical contents and format of the three books, are attached to this booklet.

## 11 BIBLIOGRAPHY

This document was compiled from lecture notes and verbal information obtained at a course in '**Management Planning for Protected Areas**' presented by Rory Allardice at the Southern African Wildlife College, 20-24 September 2004.

The primary reference used for the original course material is:

Coetzee, K. 1990. Draft Management Plan for the Karoo Nature Reserve. Unpublished internal report. Cape Nature Conservation, Port Elizabeth.