



Land Acquisition Grant Program Management Plan Guidance - 2016

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OWEB requires the development and implementation of management plans for all properties in which it invests acquisition grant funds. A management plan must contain an adequate framework for protection, enhancement, and monitoring of an acquisition's conservation values in a manner that is consistent with the terms of the grant award and deed restrictions imposed on the property in accordance with ORS 541.960. OWEB must be consulted prior to any use of the property that differs in scope or scale from uses previously approved.

OWEB recognizes the need for flexibility in management plan format and content. Your organization may have its own format, another funding entity may have a required format, or the property may be one piece of a larger, landscape-scale management plan. However, regardless of the format you use, the plan must contain certain minimum elements. The elements may be augmented and organized to produce a management plan that best addresses the needs of a property and documents the actions (both for habitat improvement and, where applicable, reserved rights) permitted under the conservation easement. OWEB expects that at a minimum, the plan will address and include the following:

Note regarding the management plan outline required in the 2016 grant application: *The highlighted sections of this document are the only items required in the management plan outline that must be submitted with the grant application. The information in the management plan outline can be general because OWEB recognizes that in many cases the property has not yet been acquired by the grantee. The rest of the management plan can be completed upon any OWEB funding award. The final management plan will need to contain all elements in one document.*

Cover Page

Project/site name, OWEB grant number, location, date, and plan preparer

Table of Contents

Include the following in your table of contents, or make sure to tab these sections for OWEB review if you are using a different format, as described above:

- Introduction
- Purpose and Goals
- Inventory and Analysis
- Desired Future Conditions
- Management Strategies and Actions
- Implementation Plan and Schedule
- Monitoring, Maintenance and Adaptive Management
- Plan Updates

- Community Involvement and/or Educational Opportunities
- Appendices

Introduction

- General description of the easement location
- General site description, including any difference between the acreage encumbered by the conservation easement and the larger property
- Date of fee simple or conservation easement purchase; and for fee purchases, the effective date of the OWEB conservation easement if it is different than the purchase date
- If applicable, a description of the team or committee that prepared the plan, and a list of the names and organizational affiliations of the members
- Summary of OWEB conservation values (acres of priority habitats, stream miles, and priority species) and prohibited and permitted actions consistent with and referencing the Conservation Easement and Baseline Inventory Documentation
- Landowner coordination: a description of any and all reserved rights in the deed or conservation easement. In general, discuss how, when, and where the rights will be exercised and coordinated with conservation activities. Include a map depicting activity locations
- Adjacent land uses and landscape context
- History (land, native people, use history and ownership)
- Past site alterations and disturbances, focusing on alterations that have impacted ecological functions and will be addressed in management strategies

Purpose and Goalsⁱ

Describe the purpose and goals for acquiring the site, consistent with your OWEB grant application. Include the approach that will be used to determine and achieve the desired future conditions or to maintain current conservation values as appropriate. Use clear commitments and goals for active management. Specify the time period covered by the management plan.

Inventory and Analysis

The purpose of the management planning inventory is to collect appropriate natural resource, social and economic information for identification of resource concerns and facilitation of the planning process. The inventory should be used to further define management problems and opportunities, and as a basis for determining the effectiveness of the management plan and its implementation.

Note: The Baseline Inventory Documentation (which described conditions at the time of easement establishment) may serve as a large part of the management planning inventory, which will include additional details as necessary to provide the rationale for the proposed management.

Inventory and describe the site's climate, geology, soils, flora and vegetation, hydrology, and fish and wildlife (maps must be referenced in the text). The inventory's level of detail should be appropriate for achieving the desired future conditions for the site.

Describe land type(s) and their condition (forest, wetland, prairie, streams/riparian, range, cropland, urban, etc.); infrastructure (roads, buildings, power lines, dikes, drains, etc.); invasive

species; and cultural, educational, and aesthetic resources. Include appropriate maps and/or imagery and reference them in the plan's text. (See page 5.)

Identify on map(s) OWEB Priority Habitats within each land type, consistent with the inventory, and describe their current condition and use. Address any discrepancies between the Baseline Inventory Documentation's accounting of the habitats, and the information gathered during the management planning inventory.

Analyze the inventory data and identify resource concerns. Prioritize resource concerns for restoration, enhancement or maintenance considering biodiversity value or rarity, significance in regional conservation plans, and long term viability at the site. Identify and prioritize threats to conservation values factoring severity, scope, and /or irreversibility.

Desired Future Conditions

Describe the desired future conditions for the site, specifically what it is expected to look like at the end of the term of this management plan. Include a map showing the intended extent of preserved or restored habitat types accompanied by a descriptive narrative of each type. In the case of a property with goals to maintain the current conservation values as the desired future condition, outline specific threats that may impact the ability to maintain conservation values (trespass issues, weeds, etc.).

Priority Management Strategies

The purpose of management strategies and actions is to set a framework for achieving the desired future conditions, or maintaining current conservation values as appropriate.

Develop and consider alternative strategies to solve resource concerns. The alternatives should be clearly linked to the resource inventory and site history. Evaluate alternatives as to their known effectiveness for achieving the conservation goals you have set for the site. Identify and select preferred alternative(s) that will best address the needs of the site's natural resources and reach the desired future conditions. If maintaining current conservation values is the desired future condition, develop strategies to minimize those threats identified.

Typically, alternative strategies are considered and evaluated when compiling detailed restoration plans for a specific project. This level of detail is not required unless that information is already developed for near-term strategies.

Coordination with Third Parties. Some properties are subject to encumbrances (e.g., utility and access easements) that give third parties rights to use the property. In such instances, the management plan must include actions for coordinating with the third parties to ensure their activities are within their rights and obligations, and to minimize impacts to the property's conservation values.

Water Rights. If an applicant is proposing to acquire fee property with appurtenant water rights, or a conservation easement with the authority to use appurtenant water rights, the use of those rights shall be consistent with the management goals and strategies identified in the management plan, including use of water for restoration or in-stream purposes. Applicants may be required to take specific actions necessary to comply with this expected outcome as a condition of a grant award.

Revenue Reinvestment. If it is expected that implementation of an OWEB-approved management plan will result in the receipt of revenues by an OWEB grantee, or its successor in title, OWEB expects the management plan to consider options for reinvesting the revenues in property-specific stewardship purposes, or for stewardship of other protected lands in the vicinity of the property. The management plan shall identify the selected approach to revenue reinvestment, whether for stewardship or other uses, and include the reasoning for it. OWEB encourages applicants to reinvest revenues in land stewardship where possible and appropriate.

Mitigation Credits. The management plan must address any generation of credits for obligatory mitigation. OWEB will approve a management plan that includes generation of such credits only if the grantee can demonstrate that the credits are not attributable to OWEB's contribution to the purchase price of the property interest, and not attributable to restoration funded by OWEB.

Implementation Plan and Schedule

The preferred alternative(s) should be implemented using methods and practices that are sound and scientifically based, and that will solve the particular resource concerns at the site.

While this may not be a part of the management plan for all actions, as appropriate for near-term strategies, prepare a schedule of operations, listing actions organized by management strategy. The schedule should include the specific resource concerns, the practices to overcome the problems, the timeframe in which each action will be started and finished, who will be responsible for implementation, and funding sources.

Note: It is recognized this may not exist for all actions at the time of management plan design, but this section should serve as a template for the organization as specific action/restoration plans are developed. The level of detail for planning and design of practice implementation should be consistent with the complexity of the management actions. Details should include scheduling, surveys, design, permits, and inspections. OWEB recognizes that in initial plan development, some information may still be in the process of being determined, such as final engineering designs. If final designs are substantively different from the preferred alternative, OWEB must be contacted for review and concurrence. Final designs should later be incorporated into the management plan, either in whole or by reference.

Monitoring, Maintenance and Adaptive Management

A good planning process is dynamic and ongoing. The implementation of practices should be evaluated for effectiveness on a schedule determined to be appropriate for the actions. The evaluation should determine whether the current management is solving the resource concerns, and if not, how the management needs to be adjusted. The extent and complexity of monitoring can vary, depending on the management issues facing the property, the complexity of the property's ecological systems, and other factors. At a minimum, the information must include:

1. Explanation of what will be monitored and maintained, including frequency and duration of field monitoring and photo points (photo points may include baseline photos for compliance, but baseline photos are not necessarily adequate for effectiveness monitoring)ⁱ
2. Monitoring protocols that may be used, and a description of how monitoring data may be analyzed and summarized

3. Maintenance actions that will be taken
4. Partners that may be involved
5. Process (including consultation with OWEB) by which management activities will be altered as needed to ensure success

Plan Updates

The ever-changing natural environment requires a dynamic approach to management planning and implementation. The plan must specify a process for periodic plan review and adjustments, to adapt to the ever-changing environment. Describe the period covered by the management plan, the reason for selecting the period, and the proposed schedule and process for updating the plan.

Note: In general, management plans should be long-term documents, containing a framework that is appropriate for approximately 20 years of work. However, because the ever-changing natural environment requires a dynamic approach to management planning, OWEB expects management plans to contain a process for review after 5 years. The review should take into account monitoring, maintenance, and adaptive management information. The plan should be updated if the information indicates that new or modified management actions are necessary to achieve the conservation goals for the property. Updated plans must be reviewed and approved by OWEB.

Community Involvement and/or Educational Opportunities

Each site will have opportunities for education, research, recreation, etc. that will need to be carefully evaluated prior to any approval. Describe your plans for these opportunities, including why, when, how often, and the partners involved.

Appendices

1. Location and Access Map*
2. Existing Habitat Map* – an aerial photo that depicts priority ecological systems and plant communities
3. Restoration Map* – an aerial photo that depicts desired future conditions
4. Monitoring Map* – an aerial photo that depicts locations of photo points, in-stream monitoring reaches, vegetation transects and data points, etc.
5. Infrastructure Map – an aerial photo with labeled features such as roads, stream crossing, trails, structures, etc.
6. Allowed Use Map – an aerial photo that depicts areas such as agricultural zones and building sites
7. Threats Map – actual and/or potential
8. Topographic, Geology, Soils Maps – as appropriate
9. Species Lists
10. Others as needed

*Note: *Required*

Each map must be referenced to specific sections in the plan's text

ⁱMust be included in the management plan outline submitted to OWEB as part of the grant application. In total, the outline must contain the following: Purpose and Goals, Desired Future Condition, Priority Management Strategies, and Monitoring, Maintenance and Adaptive Management (section 1 only). The introduction and other sections do not need to be included at time of application since most of that information is provided in the application itself, but will need to be included in the final management plan.