Management planning

Sussex Wildlife Trust

This booklet outlines the steps involved in management planning for nature conservation. It has been written as a guide with tips on what to think about and where to find the information that you need to build a plan that works for your site.

By Laurie Jackson

Cormorants at Sunset - Kai Hilton

How can management planning help you?

Management planning is an essential part of nature conservation where we consolidate all that we know about a site, and detail the management activities we will undertake to maintain or increase its value for wildlife.

A few important things to know about management planning:

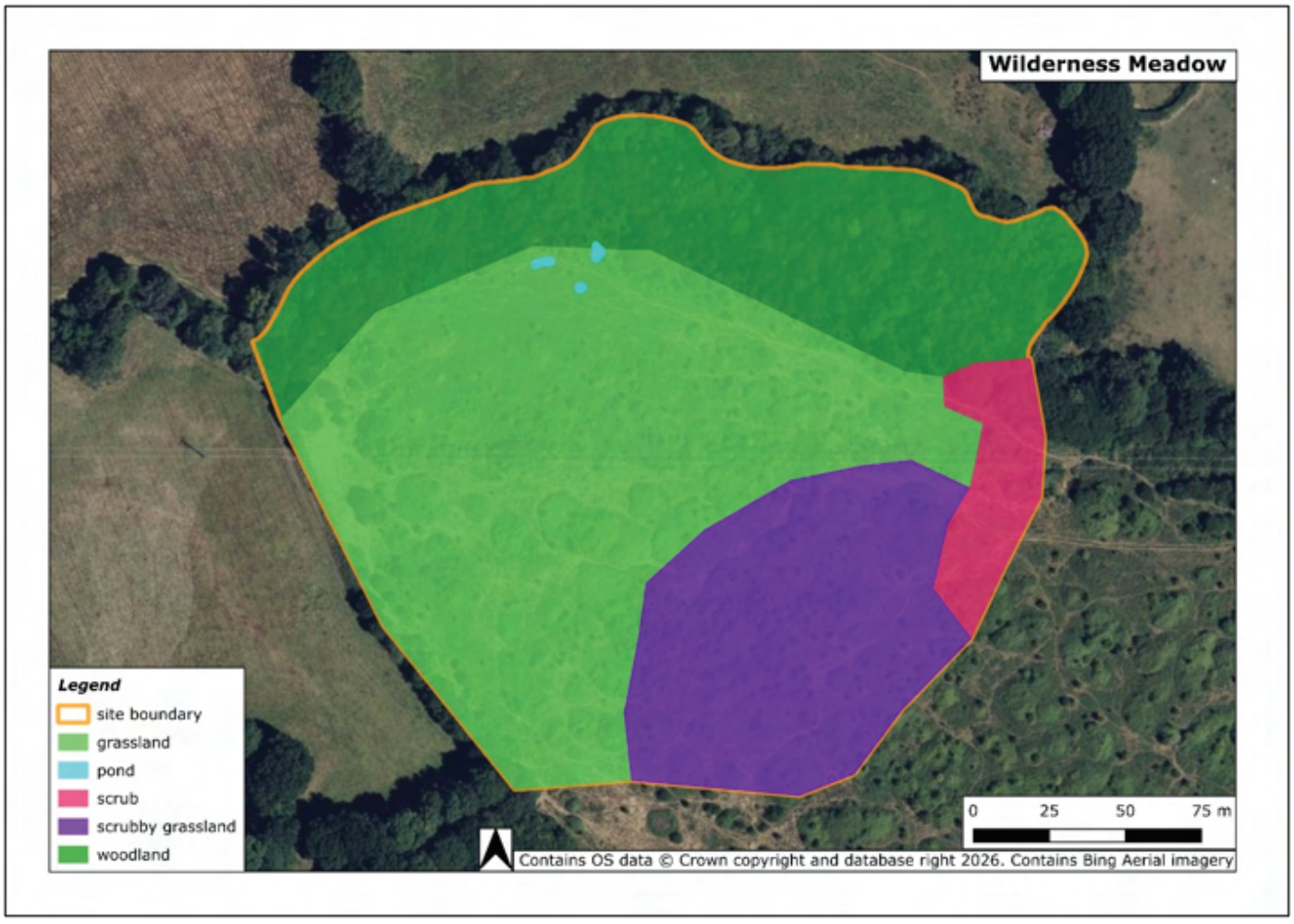
- Every site is unique, and there is no one 'right way' to write a management plan: **the key is that it contains the information needed for that particular site.**
- Plans do not need to be large and unwieldy documents, they should have enough detail as is necessary whilst being as simple as possible: **the aim is to ensure you have something that is useful and useable!**
- Someone should be able to pick your plan up and quickly understand what is going on at the site.
- As you learn more about the site and monitor the impacts of your management, you will naturally refine and adapt your plan: plans can and do change!
- For your management plan to work you need to have control over the site and be able to undertake the actions planned.
- In some situations your plan may need to meet certain criteria, if seeking approval or support from another organisation (this could be a funding provider or a statutory agency): this could specify the layout or the timescale that it covers.

What does a management plan look like?

Done well, these can be incredibly useful documents. It is worth giving some thought about what format will work best for your site and circumstances.

Management planning can look like an annotated site map with a supporting statement of management objectives, a detailed document, or something in between. The size and complexity of the site will usually determine how much detail is needed in your management planning.

Example of a simple management plan



Wilderness Meadow is semi-improved grassland, some of which has regenerating scrub, with an area of semi-natural ancient woodland and dense scrub, on seasonally wet clay soils. The aim of the management here is to increase the species richness of the grassland through grazing, and to manage woody habitats through rotational cutting, with some areas of non-intervention. A new pond will be created in proximity to three existing ponds in the north of the site, and new deadwood opportunities will be created within the woodland. The local community will be invited to enjoy the site during survey sessions and training opportunities.

Grassland

- *Cattle-grazing during late-summer to autumn (depending on ground conditions), aiming for sward height of 5-6cm.*

Ponds

- *Creation of new pond in proximity to existing ponds following advice from Freshwater Habitats Trust.*
- *Thinning of marginal plants (<25%) and careful removal of some leaf litter as needed.*

Scrub

- *Rotational cutting with hand tools between September and February, aiming to manage a fifth of the scrub habitat every 2 to 3 years.*

Scrubby grassland

- *Included within the grazing area.*
- *Coppicing of tall even-aged scrub between September and February to ensure regeneration of scrub.*

Woodland

- *Maintenance of existing glade through selective thinning as required.*
- *Commission arboriculturist to ringbark three to five trees to create standing deadwood.*
- *Annual monitoring of ditch where invasive non-native American Skunk Cabbage was previously recorded, if found, advice around manual or mechanical control sought immediately.*

Community

- *Annual open day during July for people to visit the site with visitors encouraged to record their sightings during the day on iNaturalist. Where possible harvested seed from Wilderness Meadow will be available for people to sow in their gardens.*
- *Approach local recording groups about events such as bat walks or identification mornings.*
- *Weekly updates about management and wildlife sightings on the Wilderness Meadow Instagram page, and monthly updates in the village newsletter.*
- *Approach local practitioners about the possibility of running an annual traditional skills course such as hedgelaying, scything, basket weaving or hurdle making.*

As a minimum your plan should have:

- **A description of the site and the factors affecting it:** this could be provided within a map and photographs, and some supporting text can give additional detail where needed.
- **Important features:** identification of what at the site needs safeguarding or enhancing.
- **Objectives:** an idea of how you would like the site to be, think about what is motivating you and try to be specific in this vision.
- **Management activities:** what work you will undertake to move towards your objectives.
- **Monitoring:** tracking your progress by watching how species respond, and spotting where adaptations may be needed.

Information gathering

The first stage of management planning is to slow down and really get to know the site. Through a combination of desk study, surveys and speaking to others who know the land, you have the chance to familiarise yourself with its characteristics and understand what the opportunities are for wildlife. Some or all of this information will go into your site description, and the good news is there are lots of sources of information to help you.

Writing a site description

Your site description should be a collection of facts about the site: you don't necessarily need to provide lots of detail, it may be a case of signposting where additional, accessible information is held. Some of the things that can be useful (depending on the site) include:

- Site boundary, location and grid reference: this could be shown on a map (or set of maps), which can also detail land ownership, size, named or numbered management areas, areas of different habitat.
- Physical characteristics of the site: this could include information about climate (**the Met Office** provide weather and climate data), geology and soils (**Soilscapes** and the **BGS Geology Viewer** can help), topography, landscape and hydrology (check **CEH**, **Defra** and **Magic**).
- Biological characteristics of the site: this could be a description of the main habitats (you might want to use a classification such as **UKHab** or **Phase 1** but that's not essential) and species present (**SxBRC** can provide historic data and Sussex Wildlife Trust's guide to **Wildlife Surveys and Monitoring** outlines further useful information about gathering wildlife data)
- Legal considerations: this can include requirements relating to statutory designations, public rights of way, common land, protected species, safeguarding, and health and safety.

- Land-use: this might include details of past and present land-use, access, designations and site infrastructure such as fencing, stiles or interpretation boards (**Magic** provides information about designations and land management schemes, and you can find details of designated sites at **Natural England**). You may also want to research existing landscape-scale groups (these include **Farmer Clusters** and the **Rewilding Network**) and **Local Nature Recovery Strategies** to see how your land does or could fit into these.
- Cultural features: this could highlight any historical or archaeological significance of the land (**Historic England** and **Magic** can help you), along with its current use e.g. its use as a Forest School site, by the Thursday evening running group, or as a popular bird-watching area in the winter.

At least one site map will be invaluable. This could be hand-drawn, but maps can also be produced using programs such as Paint (to annotate a satellite image or digital map), **Magic** or Google Earth, or software such as **QGIS** or **Land App.** You can use whatever style of map communicates what you need to know!

Identifying important features

The process of writing a site description should help you to identify the features of value at the site as you move on to the next stage of your management planning. It is important to get a second (third and fourth) opinion, from people with a broad range of experience to ensure that you are not overlooking anything about the history, use, management, cultural or wildlife value of the site, and you have a good understanding of what is important, why and to who.

Important features might include:

- Specific habitats present e.g. reedbed, traditional orchard, species-rich grassland or broad-leaved woodland. All habitats will have some value for wildlife, however those that are closest to natural habitat usually have the most.
- Statutory or non-statutory designations: these may be for nature conservation or other features such as geology or archaeology.
- Species that are protected or of conservation concern nationally or locally.
- Groups of species that could benefit from direct actions such as breeding amphibians, wild pollinators, farmland birds or tree-roosting bats.
- The role of the site within the wider landscape and its relationship with other important areas for wildlife.

If a site has a statutory nature conservation designation the habitat and species features will be identified on a citation (**Natural England** or **JNCC**), along with information about recommended management, potentially damaging activities, previous condition assessments, and activities that require consent. You should speak to Natural England as part of your management planning.

If a site has a non-statutory nature conservation designation (Local Wildlife Site) there will be a notification for the site. You should speak to Sussex Biodiversity Record Centre for more information.

It is worth remembering that important features for the site don't have to end at wildlife, and a site can also have huge value in terms of its educational use, its place within a larger landscape project, its geology or geomorphology, its value as a place for quiet reflection, or its role in advocating positive land management practices, amongst many other things.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Identifying the important features of a site also gives you a chance to take a step back and consider what threats and other influences could impact these features (and your management of them), which of these are within your control and which aren't. This can include natural and humanmade factors as diverse as a spring rising, a bridleway running through the site, a steep access track, run-off from a nearby road, nitrogen pollutants in the air, or seedling regeneration from an adjacent conifer plantation.

You may also notice opportunities at this point too, for example species found locally that your site could support but doesn't currently, the chance to collaborate with a neighbour, or work with the local community. You may be able to access help to fund management activities through schemes such as Countryside Stewardship or Farming in Protected Landscapes (in National Parks and National Landscapes), receive advice from projects run by organisations such as Sussex Wildlife Trust, the Woodland Trust and Rivers Trusts, or apply for grants offered by providers such as the Lund Fund or the National Lottery.


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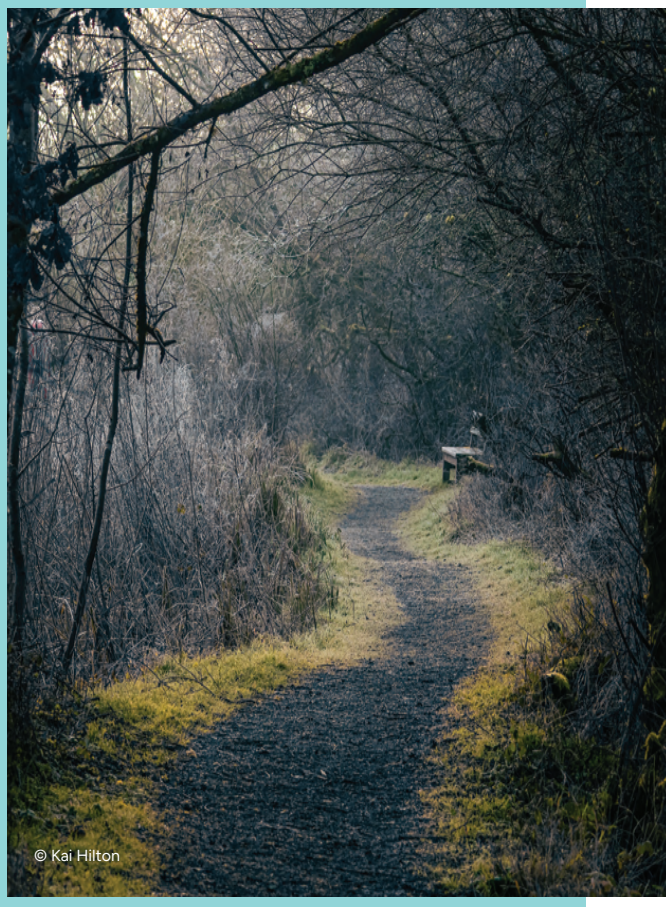
Dreaming big

Management planning provides the bridge between your site now and your vision for the future. Its purpose is to guide you as you move your site closer towards your vision.

Our brains all work differently, for some we like to start with a vision and work backwards from there to chart how we will achieve it, whilst others prefer to start where they are and imagine how things could progress going forwards.



By gathering information to form the site description and garnering opinions to identify the site's important features, you are now at the point you can develop your plans for the site.

These may be shaped around the habitats and species, as well as how the site is used and appreciated for recreation, how you cooperate with neighbours, and how you engage visitors with the site and its story.

Your objectives can be formulated in a combination of words, numbers and pictures, whatever helps you to illustrate your planned direction of travel. As you begin to write your objectives, take the time to check with yourself and others that they are feasible. Aspirational objectives are great, but they need to be:

Realistic: based on our current understanding of species and habitat ranges and requirements.

Deliverable: in terms of resources (time, financial, equipment), and with a clear mechanism to achieve them.

Quantifiable: it needs to be clear what management activities are required at what frequency and by who.

Purposeful: you need to have a goal in mind as you write your objectives, it is easy to write a phrase like 'favourable condition' but we need to understand what we mean by that. You may find it useful to get advice from an ecologist or nature conservation organisation (**Natural England** have also written some definitions of favourable conservation statuses).

Trackable: you will need a way to measure your progress towards your objectives, this will often centre around a measure of condition, range or abundance e.g. evidence of breeding success, total population size, area of habitat, abundance of indicator species, habitat structure.

Defining management

There are many and varied ways to manage land, and you may have more than one option for how to meet an objective. It can be useful to list the possibilities and the potential impact of each on the site, along with what is required to make it happen in terms of resources. This can help you decide what is the best option for your site and circumstances.

Example

Grassland management and Wilderness Meadow

Option 1: grazing with livestock

- *Neighbour has expressed an interest in using the meadow to graze their cattle in the summer.*
- *Stock-proof fencing in place: some repairs needed. Investment would be needed for water supply. Shady areas available. Neighbour would take responsibility for welfare checks.*
- *Cattle will also help to manage scrub regeneration through browsing and trampling.*

Option 2: cutting

- *Investment needed in equipment and training.*
- *Limited time available during the summer months due to work commitments.*
- *Potential to ask neighbour to cut and bale hay for animal feed? May have to compromise on timing.*

Option 3: no management

- *Lowest cost option. Over time site would decrease in species diversity, becoming rank and scrubby. This would increase habitat for some species of birds and small mammals, but would not meet the objective to increase species richness of the grassland.*

It can be useful to look at similar sites and how they are managed, but management will usually need to be tweaked for each site, with learning along the way about the intensity and frequency of management that is appropriate.

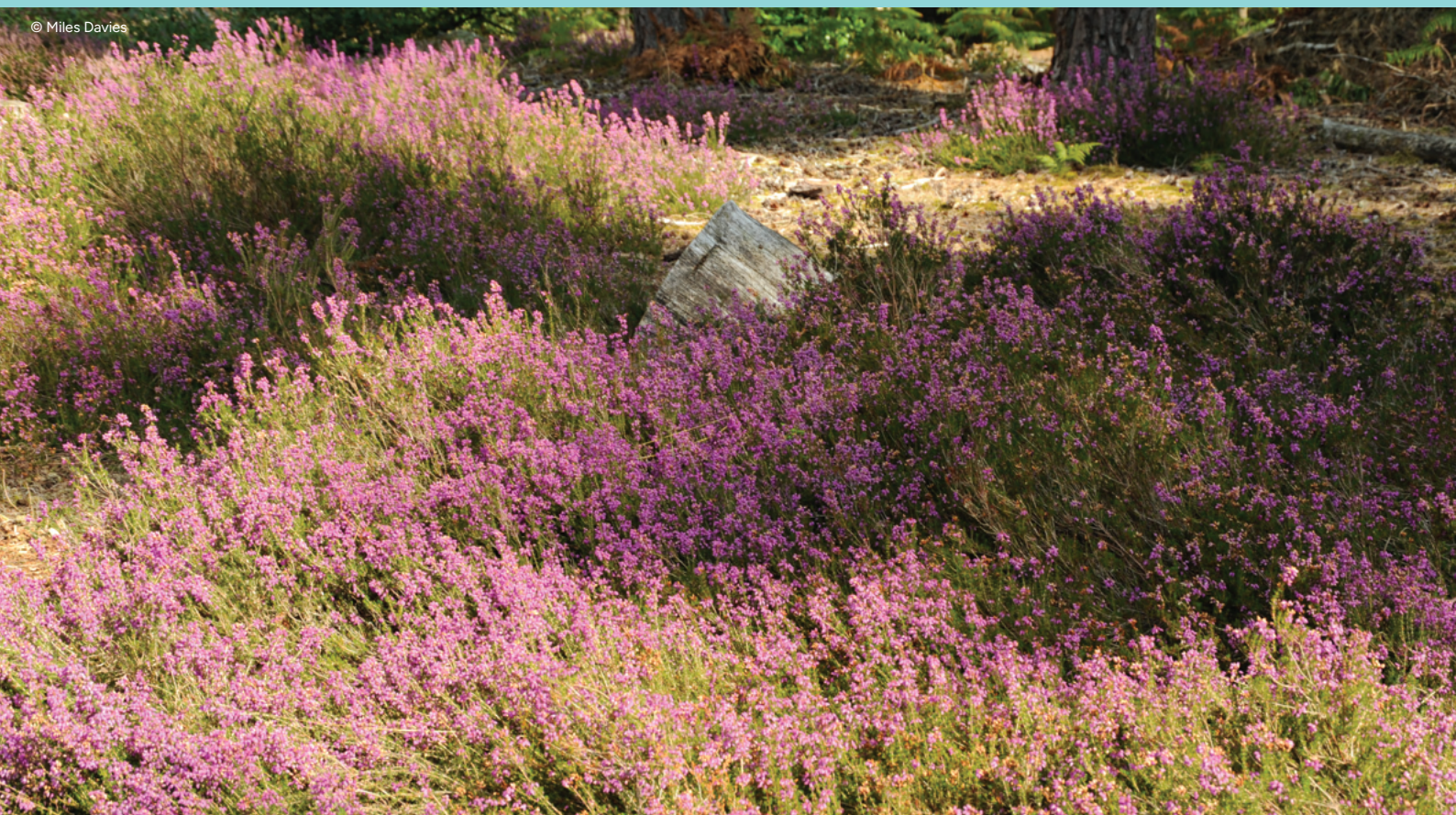
For every management activity you identify make sure you know why: can you link it back to your original vision and objectives for the site?

Once you have identified your management activities you need to detail where each will be carried out (this can link to a map of habitats or compartments), who will be responsible, what equipment they might need, how they will carry out the work, and when and how often it is needed. This information is important in working out priorities, budgets and work schedules.

Is it working?

Monitoring is a key part of any management planning (this can include habitats and species, as well as aspects such as community engagement, education and training).

Without it, it is impossible to judge what has been successful, and what has worked less well and might need adapting. This is where having baseline surveys of your site will help you out (Sussex Wildlife Trust guide to **Wildlife Surveys and Monitoring**) as you can clearly see what impact your management is having.



Example

Wilderness Meadow monitoring
(all site records passed on to Sussex Biodiversity Record Centre)

Objective 1: *increase species richness of the grassland with at least six positive indicators occasional in the sward by 2030.*

- *Mid-summer survey of abundance (using DAFOR) of botanical indicators in meadow: Agrimony, Common Bird's-foot Trefoil, Common Knapweed, Meadow Vetchling, Lady's Bedstraw, Oxeye Daisy, Red Clover, Yellow-rattle, carried out every two years.*
- *Four butterfly surveys between May and September (two during July and August) following a transect around the site.*

Objective 2: provide areas of mixed-age scrub with a fifth of scrub cut every two to three years.

- *Annual walkover survey to monitor scrub regrowth, with 10-20% of grassland containing woody shrubs.*
- *Two bird surveys between April and June following a transect around the site.*
- *Two targeted surveys for Purple Emperor in June/July.*

Objective 3: increase availability of deadwood habitat.

- *Commission arboriculturist to ringbark five trees by 2026.*
- *Passive bat detector borrowed every two years to gather data for two weeks (during August to September) on bat activity levels.*

Objective 4: maintain woodland condition compared to baseline data on species present, regeneration of woody plants, amount of standing and fallen deadwood, and availability of open space.

- *Annual monitoring of ditch for signs of American Skunk Cabbage.*
- *Woodland condition survey every five years repeating baseline methodology.*

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Example

Objective 5: increase open water habitat.

- *Creation of new pond by autumn 2028.*
- *Three point counts of ponds between May and September to survey dragonflies and damselflies.*

Objective 6: increase community awareness and appreciation of Wilderness Meadow.

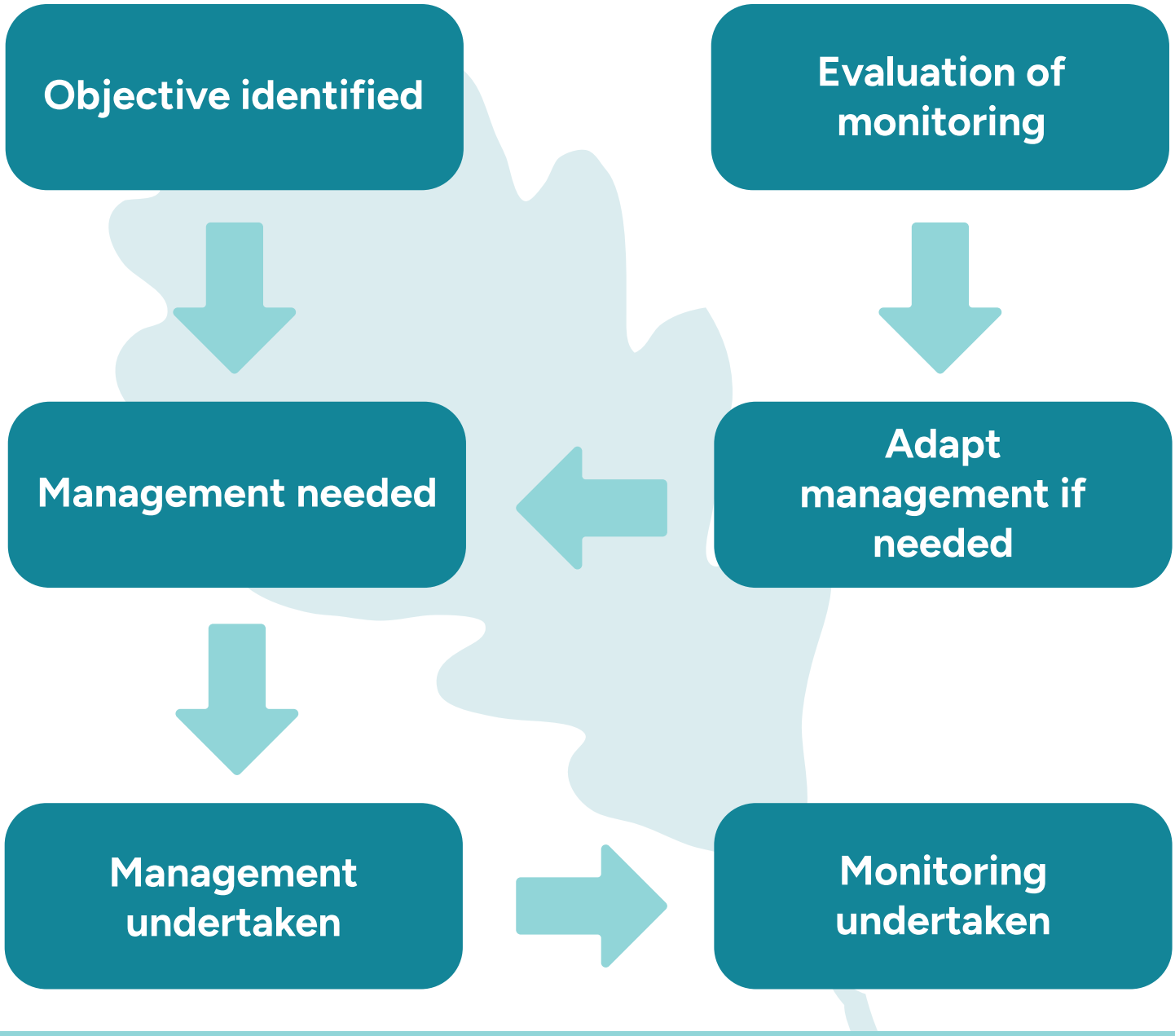
- *50 'research grade' sightings submitted annually to iNaturalist.*
- *At least two public events offered annually.*

Your plan should now contain clear objectives, a plan to reach these objectives and a way of knowing if you are.

Monitoring plans can be presented as a table or list that details what activities will be carried out, where, by who and when (frequency and time of year). It is important that the same methods are followed each time you carry out your monitoring, so you should also detail the methods you will use and if you are following established schemes such as BeeWalk or Breeding Bird Survey transects.

Management can throw up surprises and we can't assume we will achieve the outcomes we hope for just because that is what we want to achieve. Nature isn't static, for example the impact of grazing a meadow with 20 cows will have a different outcome in a warm, wet year, than a hot, dry one.

Monitoring can tell you the real impact of management, not what you think or hope will happen. It gives you the opportunity to refine your management approach, and perhaps your objectives, as you learn more about the site. This ensures that your management is based on a current understanding of the site and its features.



Management activities can be active e.g. traditional conservation management or more-passive e.g. non-intervention or wilding. The first is usually outcome-defined with specific targets for habitats or species, with the second process-led restoration; the outcomes are determined by natural processes involving vegetation dynamics, ecological connection and succession, and small- and large-scale disturbance including grazing, browsing, trampling, hydrology, predation, competition and random events such as storms.

If a minimum intervention, natural-process driven or wilding approach is being used, there may not be a defined outcome. Instead you may want to identify limits of acceptable change to help you identify at what point management is undertaken e.g. rather than having a defined programme of annual scrub clearance, the rotational management of scrub maybe triggered once scrub cover exceeds 25% of a field.

Final tips

When you have finished your management planning it is time for an honest review to ensure that is it useful, informative and that all of those involved will be able to understand and use it. The aim is to create plans that are not destined to lurk on a shelf or in a computer folder!

- Keep the language simple and accessible: management plans aren't the place for creative writing, you can use that on your social media, interpretation boards and leaflets about the site.
- Make it succinct: the most useful place for detail is in the management activities section.
- Make sure all the information you include serves a purpose in your management planning.
- Review and adapt your management plan as you learn more about your site.

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