

## 13. GUIDELINES FOR MANAGEMENT PLANNING

### Introduction

The purpose of this section is to present guidelines for an idealized planning procedure that addresses the full range of factors to consider when developing reserve Management Plans. What is important here is the thought process and approach by which management problems are identified and addressed — not the nomenclature or exact sequence of steps to be taken. Needs, limitations, and priorities will vary widely with each situation. The reserve manager and committee members must tailor the process to meet their particular circumstances.

As used here, the term Management Plan is synonymous with Master Plan. A Management Plan can, and should, include subplans for: (a) resource management, (b) program development (teaching, research, public service), (c) environmental monitoring, (d) facilities development, and (e) administration (policies, procedures, regulations, guidelines, staffing, funding, maintenance).

### What Is a Management Plan?

A Management Plan is a document that guides and controls the management and use of reserve resources and the development of staffing, funding, facilities, equipment, and programs needed to support that management and use. Central to such a plan is a statement of purpose, goals, and measurable objectives which provide a framework for determining specific actions to take, when they will be taken, and the budget, personnel, and facilities needed to implement those actions. Thus, a management plan is a working document that guides and facilitates all

aspects of reserve operation, administration, and use. It is also a valuable tool for identifying and prioritizing needs and organizing a management future based on an assessment of the present.

### Why Do a Management Plan?

- To define your management purpose: a planning tool
- To set your priorities: a planning tool
- To allocate limited staffing, funding, equipment & materials: a planning tool
- To document values and uses: a justification tool
- To document unmet needs: a fundraising and budgeting tool
- To gain the understanding and support of the parent institution, government agencies, grant programs, and the general public: a communications and public relations tool
- To educate and expose University personnel to the full range of factors and needs to be considered when administering and managing an NRS reserve: a training and information management tool

### Levels of Detail

1. Start simple and stay as simple as possible, recognizing staff and budgetary limitations.
2. Keep in mind that simple plans are: easier to prepare, cheaper to prepare, more flexible to implement and change, easier to read and understand.

3. Understand that complexity of detail and sophistication of approach will naturally evolve as the plan is updated and as increased support, based on measurable progress, becomes available.
4. Consider the Management Plan Outline in Appendix 13A, which presents a comprehensive list of plan components and factors for a large, heavily used, fully developed site. Most plans can and should be abbreviated modifications of this master outline.

#### Interim Guideline Approach

In instances where the database is inadequate or when a complete management plan is not required, it is possible – even desirable – to abbreviate the planning process by limiting the Management Plan to a brief statement of purpose, a brief statement of program goals and objectives, and a set of interim management guidelines. These guidelines can be as simple as a statement of values to be protected and the most basic actions needed to maintain those values, or it can be a more sophisticated statement of policies to address specific management issues, types of use, and principles of facilities development.

The main purpose of this interim guideline approach is to provide short term protection for the most basic values for which the reserve has been set aside until a full plan can be prepared. See Appendix 13A for a Management Plan Outline to be used as a tool to guide and assist reserve managers in this approach.

## Regional Integration

Reserves do not exist in isolation, and most NRS reserves are small and susceptible to adverse impact from surrounding land uses. Management Plans should recognize the interface between reserves and surrounding land uses.

A regional planning perspective allows for the identification of buffer zones, compatible land uses, and internal zoning that will insulate reserve uses and programs from adverse impact from surrounding land uses.

## Coordination and Involvement

1. Identify reserve constituencies: researchers, students, administrators, government officials, nearby land owners.
2. Employ constituency involvement in plan preparation to establish lines of communication that will lead to problem resolution and to greater understanding and support for the reserve.
3. Understand that level, timing, and intensity of constituency involvement can vary — from keeping certain segments of the public regularly informed, to seeking their review and comment on plan drafts, to encouraging active involvement in the development and writing of the plan.

## Management Planning: Procedural Guidelines

The following guidelines, originally approved by the Universitywide NRS Advisory Committee in March 1985 and updated in June 2003, outline the procedures for development, review, and approval of Management Plans.

1. Individual Management Plans are researched and written in consultation with the NRS Coordinator/Environmental Planner, the Faculty Reserve Manager, and the Reserve Management Advisory Committee, in conformance with the management planning guidelines presented in this administrative handbook.
2. Management Plans are reviewed and endorsed by the Campus NRS Advisory Committee.
3. Management Plans are reviewed and endorsed by the Associate Director of the NRS. (If any exceptions to the guidelines are needed, the Associate Director of the NRS consults with Universitywide NRS Advisory Committee.)
4. Management Plans are forwarded to the Campus NRS Administrative Officer for review, approval, and authorization to implement.
5. Final approved Management Plans are circulated to the Universitywide NRS Advisory Committee and the Campus NRS Advisory Committee for information.