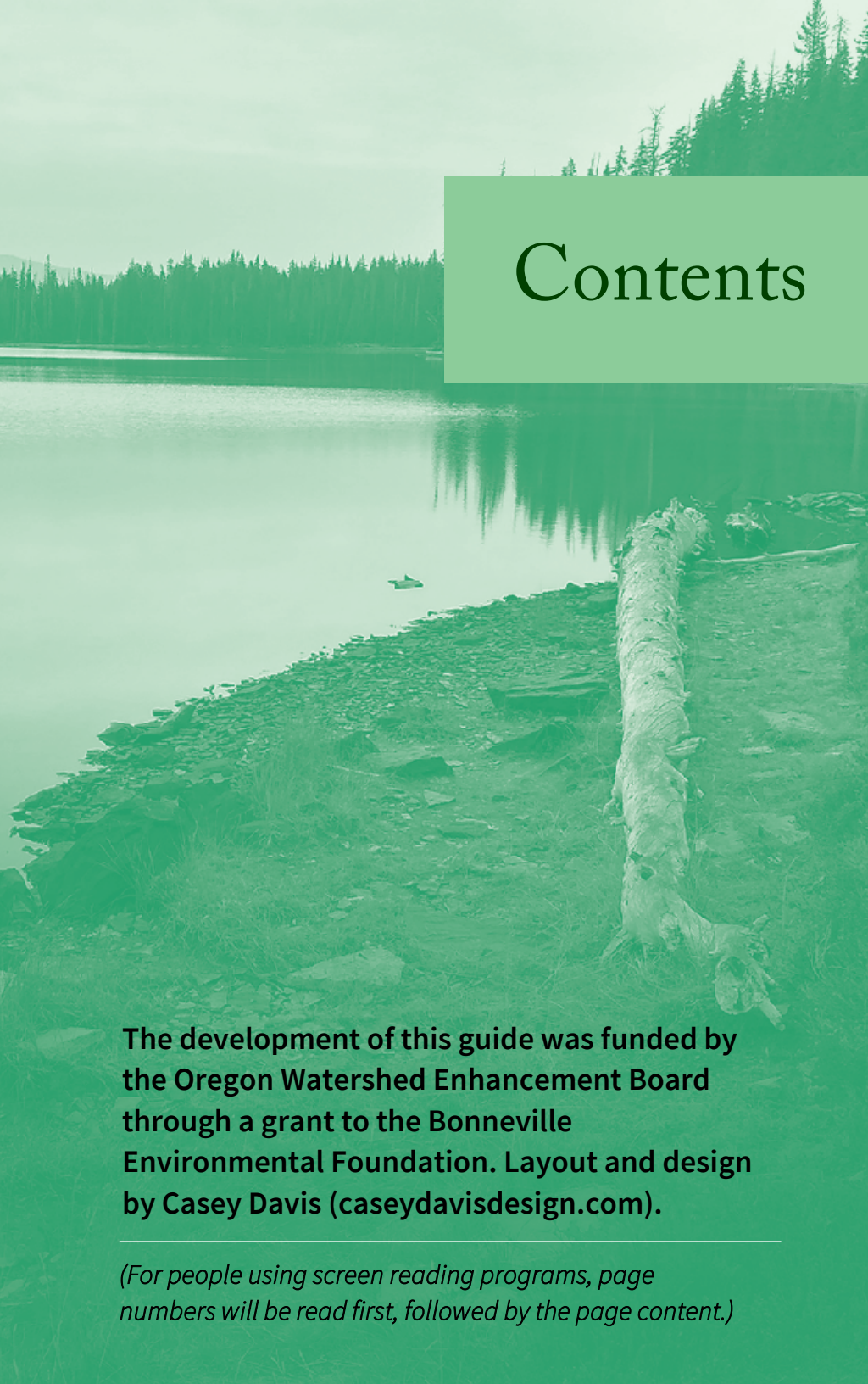




Strategic Action Planning *for Ecological Restoration Partnerships*



A GUIDE PREPARED FOR THE ***Oregon Watershed Enhancement Board***
IN COLLABORATION WITH **BONNEVILLE ENVIRONMENTAL FOUNDATION**

A green-tinted photograph of a forested lake. In the foreground, a large, weathered log lies on a rocky shore. The water is calm, reflecting the surrounding forest. In the background, a dense line of evergreen trees borders the lake, with mountains visible in the distance under a hazy sky.

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(For people using screen reading programs, page numbers will be read first, followed by the page content.)

Key Terms & Definitions

Adaptive Management

Adaptive management is a systematic process for continually improving by learning from ongoing experience. The process is commonly described as an iterative cycle of planning, implementing, evaluating, and adjusting (*see Section 10*).

Conservation Action

Conservation actions are specific ecological conservation or restoration interventions, treatments, projects, or other activities that will contribute to specific conservation output objectives (*see Section 8.B*).

Conservation Goal

Conservation goals are statements that describe the desired future condition of each of the partnership's selected ecological priorities within a specified timeframe (*see Section 6*).

Conservation Outputs

Conservation outputs are specific products or yields resulting from conservation actions that can be quantified and measured over time (*see Section 8.C*).

Ecological Outcomes

Ecological outcomes (biophysical conditions or processes) are near- and long-term intermediate results that are expected to emerge from conservation actions and resulting outputs. The cumulative impact of ecological outcomes is the achievement of conservation goals (*see Section 8.D*).

Ecological Priority

Ecological priorities are highly valued species and/or ecosystem-level habitat types that are the focus of the partnership's efforts (*see Section 6*).

Indicator

Indicators are measurable variables used to define the degree and direction of change in a conservation output or ecological outcome. Indicators are selected for each objective (*see Section 9.C*).

Objective

A conservation output objective states the target or anticipated type, scale, location, and timing of actions related to a strategy. An ecological outcome objective states the degree, direction, and timing of change predicted for a specific outcome. Objectives are also commonly referred to as targets (*see Sections 9.A and 9.B*).

Strategy

A strategy is a group of related conservation actions that are intended to reduce or eliminate limiting factors or otherwise cause changes needed to restore ecological processes or functions associated with ecological priorities (*see Section 8.A*).

Theory of Change

A theory of change is a way of explaining the hypothesized relationships between conservation strategies and actions and the ecological outcomes they are expected to produce (*see Section 8 and Figure 1*). Theories of change can be described graphically and in narrative form.

Vision

A restoration vision is an aspirational statement that describes the future desired condition if the conservation and restoration effort is ultimately successful in achieving the conservation goals. It can also describe the impact that achieving those goals will have on the affected human communities (*see Section 5*).

The Purpose and Value of Strategic Action Plans

A Strategic Action Plan (SAP) describes a partnership's long-term ecological conservation and restoration aspirations with thoughtful consideration of the context of the actions needed to achieve their stated ecological vision.

A SAP succinctly communicates key information including vision, goals, geographic and temporal scope, ecological and social setting, strategies, and a theory of change. In essence, a SAP serves as the road map, or blueprint, for a partnership's work. A SAP may cover a timeframe longer than a specific funding award given the time often needed to carry out planned actions and realize desired ecological outcomes. It provides the foundation for developing an approach to track progress and a process for adapting strategies and actions based on what a partnership learns through carrying out its work. Finally, a SAP communicates the partnership's intentions to its members and others in the watershed that have an interest in the work a partnership does and the outcomes it seeks to achieve.

Public and private funding institutions often require that a partnership is operating under a current SAP to be eligible for grant programs. For example, the **Oregon Watershed Enhancement Board's (OWEB's) Focused Investment Partnership (FIP) Program** requires the development of a SAP that follows this guidance in order to be eligible for funding. A SAP provides funders with a comprehensive understanding of what they are investing in and the confidence that the partnership has done the deep work necessary to have selected interventions that have the greatest likelihood of achieving their desired ecological outcomes.

A Strategic Action Plan (SAP) serves as the road map, or blueprint, for a partnership's work.

About this Guidance

Ecological restoration partnerships in Oregon have used a variety of planning methods and frameworks to gather, organize, and assess relevant information about their conservation context and lay out a clear and logical approach to developing and implementing effective conservation actions needed to achieve their goals. The development of this guidance has accounted for many of these planning approaches, and it has been primarily informed by the Conservation Measures Partnership's Conservation Standards¹. It includes elements, concepts, and principles that OWEB believes are critical for an effective SAP.

¹ Conservation Measures Partnership. 2020. Open standards for the practice of conservation. Version 4.0. <https://conservationstandards.org/>

A SAP should include the following key elements:

1. Executive Summary
2. Introduction
3. Partnership Members and Roles
4. Scope
5. Vision
6. Ecological Priorities and Goals
7. Conservation Context
8. Theory of Change
9. Progress Monitoring Framework
10. Adaptive Management
11. Sustainability
12. Literature Citations
13. Partnership Certification Page

Components of a Strategic Action Plan

A Strategic Action Plan (SAP) synthesizes current knowledge and available information to create a foundation for science-based strategy development and implementation, ongoing progress tracking, and adaptive management.

A significant investment of time and effort is required to develop a SAP, especially when the process involves multiple partners with diverse interests and areas of expertise. Ongoing capacity and investment are also required to manage and implement the plan, keep it updated, collect monitoring data related to key outputs and outcomes, and to act on learning to adapt it.

Strategic Action Plan Outline

The following outline details the components of the SAP template.



1 Executive Summary

Purpose: *To provide a brief summary of the entire plan*

In one page provide a concise, condensed overview of the plan, including reference to the partnership, conservation context, ecological priority(ies), vision and goals, and strategies.

2 Introduction

Purpose: *To set the stage and general context for the SAP*

Introduce the SAP by explaining its origin, reason or purpose, and the process the partnership used to create it.

3 Partnership Roles

Purpose: *To identify the members of the partnership, how the partnership is organized, and their relative contributions*

Name the organizations that are members of the partnership and provide a brief description of their experience, expertise, and the role(s) they will play to manage the partnership and implement the SAP. Partnerships are often organized in a nested fashion. For example, there may be core partners who will bring substantial staff and/or resources to the partnership and play key roles in managing, implementing, monitoring, adaptively managing, and communicating progress and other partners that play a more supportive role such as providing technical advice or input on specific areas of need. The **Governance Document** guide provides recommendations that will help develop this section.

4 Geographic Scope and Timeline

Purpose: *To define the spatial and temporal scope for the SAP*

Define the geographic boundaries of the SAP's area of focus. Include a map and explain the rationale for delineating the boundaries, including how it aligns with the capacity, strengths, and nature of the partnership, and is appropriate for achieving the conservation goals.

Describe the period of time the SAP is intended to be relevant and explain why that timeframe has been chosen.

Provide any methodology and rationale for how the partnership is prioritizing and/or sequencing areas within the larger area of focus. Partnerships may use a variety of methods to help them make decisions about where to focus their initial efforts because they will not have the resources or capacity to implement actions everywhere they are needed all at once. For example, a partnership may begin their work where they have the greatest control and influence or where a priority species is limited by a habitat dependent life history stage. A partnership may choose to defer action where conditions are the most degraded given the high cost and instead focus where ecological values are intact but there is a high potential for biodiversity or ecological function loss.

5 Vision

Purpose: *To describe the partnership's definition of success*

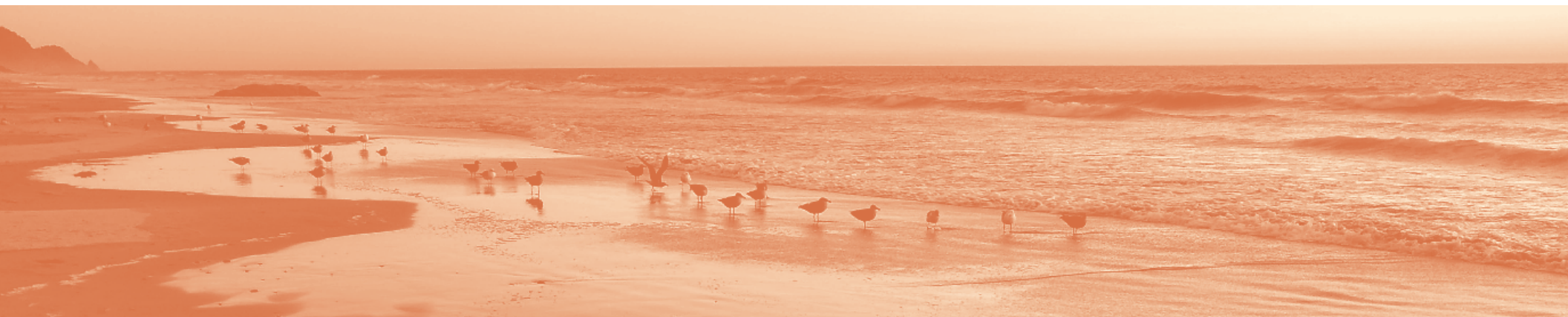
Define the partnership's vision. A restoration vision is an aspirational statement that describes the future desired condition if the program is ultimately successful in achieving the conservation goals for each ecological priority. It can also describe the impact (social, economic, cultural, etc.) that achieving those goals will have on the affected human communities.

Examples of visions include:

“Oak systems are abundant, diverse, and healthy, supporting rich biodiversity and human uses for generations to come.”

(East Cascades Oak Partnership; Oak Woodland and Prairie Habitat ecological priority).

“Our vision and long-term ecological goal is a network of healthy and resilient estuaries on Oregon's central coast that sustain a full complement of thriving native fish and wildlife populations, and support economically and socially vibrant communities.” *(Oregon Central Coast Estuary Collaborative; Coast Estuaries ecological priority).*



6 Ecological Priorities and Goals

Purpose: *To identify the ecological priorities that are the focus of this SAP and define their desired future condition*

Describe the **ecological priorities** that represent the focus of the SAP. Ecological priorities can be high value species and/or ecosystem-level habitat types.

Examples include *those adopted by the OWEB Board* for the Focused Investment Partnership Program.

Define **conservation goals** for each ecological priority. Conservation goals are statements that describe the desired future condition of each of the partnership's selected ecological priorities within a specified timeframe. The timeframe for conservation goals will often span years or decades given the time needed to plan, fund, and implement conservation actions across a landscape-scale geography and because of the time needed for physical and biological responses to occur.

For the purposes of this guidance, goals and objectives are similar in how they are defined, but goals operate at the overarching ecological priority level and objectives are defined for specific outputs or intermediate outcomes. The achievement of a conservation goal is the result of achieving one or more related objectives. *(see Section 9. Progress Monitoring Framework).*

Examples of conservation goals for ecological priorities include:

Dry-type forest habitat: By 2050, 80% of dry forest habitat within the partnership's geographic scope will contain a balance of late seral closed and open canopy conditions and species composition within the desired range of variability.

Aquatic habitat for native fish species: By 2050, the suite of stream channel and floodplain conditions required for steelhead spawning and rearing will be restored.



7 Conservation Context

Purpose: *To describe the context of the SAP*

Describe the biophysical, social, and historical context of the SAP and the factors that created the impetus for taking action.

Reference or cite key documents (e.g., species recovery plans, conservation, tribal and/or other key plans, subbasin plans, reports, assessments, etc.) that support your description.

Elements of this section should include:

A Biophysical Context

- Geological setting of the focus area
- Ecoregional context within which the focus area is situated
- Terrestrial and aquatic ecosystems and supported species and their current status

B Social Context

- Land ownership (public, tribal, private, industrial, conservation, etc.).
- Land use (timber management, agriculture, wilderness, conservation, etc.)
- Tribal governments and relevant treaties
- Human communities (urban or rural population centers) and their relationship(s) with ecological priorities and the supporting landscape
- Key interests that may be important for the implementation of the SAP (e.g., timber industry, ranching, recreation, etc.).
- Economic context (historical, current, and future trends relevant to the ecological priorities)
- Any other social factors within the SAP geography that the partnership will need to address



C Historical

- Past events or human activities not mentioned in **A** and **B** that have influenced or are currently influencing the status or condition of the ecological priorities
- Past, ongoing, or planned activities focused on conserving and restoring ecological priorities. Include other ongoing conservation, restoration, or natural resource management efforts that influence the partnership's work or desired ecological outcomes. Explain the relationship the SAP has with these efforts (geographically and programmatically) and how the efforts leverage the capacity of one another (implementation, monitoring, communications, etc.)

D Climate Impacts

- Describe how projected climate change will influence ecosystem function within the proposed SAP geography.
- Describe how the proposed conservation actions will improve ecosystem resilience in the face of climate change. Include how species, habitat, and/or water quality variables are expected to be affected.
- Describe any constraints on the partnership's ability to incorporate climate considerations into the SAP or project-level conservation planning.

8 Theory of Change

Purpose: *To describe theories and underlying assumptions for how strategies and conservation actions are expected to produce ecological outcomes.*

A **theory of change** is a way of explaining the hypothesized relationships between conservation strategies and the ecological outcomes they are expected to produce. By creating a theory of change a partnership can achieve a more complete understanding of why they are prioritizing and implementing certain conservation actions and how those actions are expected to contribute to their conservation goals - and ultimately the partnership's conservation vision.

The development of a theory of change also helps a partnership reveal assumptions that underlie strategic decisions and identify areas of uncertainty where more information is needed to better guide strategy development and program implementation.

Finally, a theory of change provides the foundation for monitoring progress **(Section 9)** and adaptively managing a conservation program **(Section 10)**. As conservation actions are implemented and partnerships learn about their effectiveness or gain new knowledge about the context of their work, theories of change may need to be revisited and updated.

Theory of Change Development Process

Theories of change can be developed and communicated using a combination of graphical and narrative approaches. For example, the process described in the Conservation Measures Partnership's Open Standards for the Practice of Conservation 4.0, is used by many partnerships to develop and document theories of change (also called results chains).

Ideally a theory of change is developed collaboratively with all members of the partnership participating and contributing at key stages of the planning process. This will ensure common agreement and understanding about the rationale for decisions about how and where resources are invested. In most cases, a smaller sub-group of the partnership focuses on the technical aspects of theory of change development with periodic check-ins or workshops with the full partnership to ensure common understanding and agreement as the theory of change is completed. Ideally all members of the partnership agree on and support the final version of the theory of change.

Use the following questions to guide the development of a theory of change, supporting your information with tables or other graphical tools as needed. Where appropriate, provide citations or other documentation to support assertions regarding the relationships or assumptions between linked elements. **See Figure 1 for elements and relationships.**





Theory of Change Development Process, continued

A Strategies What are the strategies? A strategy is a group of related conservation actions that are intended to reduce or eliminate limiting factors or otherwise cause changes needed to restore ecological processes or functions associated with ecological priorities.

Examples of conservation strategies include:

habitat protection, ecological forest and woodland management, stream and floodplain restoration, restoration of tidal influence, wetland restoration, fish passage restoration, instream flow restoration, wet meadow hydrology restoration, invasive species control, native plant community restoration, and landowner enrollment in cooperative incentive programs.

When community engagement is an important part of making conservation strategies successful, include it here.

B Conservation Actions What conservation actions will be implemented under the strategies? Actions are specific ecological conservation or restoration interventions, treatments, projects, or other activities that will contribute to specific conservation output objectives. Conservation actions produce conservation outputs.

Examples of conservation actions include:

mechanical forest thinning, prescribed fire, juniper removal, culvert replacement, acquiring interest in land or water, or dam removal.

Theory of Change Development Process, continued

C Conservation Outputs What conservation outputs does the partnership anticipate from the actions? Conservation outputs are specific products or yields resulting from conservation actions that can be quantified and measured over time. Conservation outputs are typically achieved in the near term as an immediate result of a conservation action. Collectively, conservation outputs contribute to positive changes in short-term ecological process and function that lead to the achievement of ecological outcomes over the long term. Objectives are used to define the desired timeline and measurable product(s) of each output. Guidance on developing objectives is described in **Section 9**.

Examples of conservation outputs include:

forest habitat sites identified and thinned, tree and fuels densities reduced, aquatic habitat complexity projects implemented, floodplain habitat reconnected, water rights transfers completed, flow restored in stream, invasive species removed, plants planted, fencing completed, fish passage barriers removed, and fish screens installed.

When community engagement is a critical element of a partnership's work, include relevant outputs such as community presentations or public site visits.

D Ecological Outcomes What near- and long-term ecological outcomes (biophysical conditions or processes) do you expect to develop in response to conservation actions and resulting outputs? What are the mechanisms by which those desired outcomes will develop or evolve? Outcomes may occur within months to a few years to decades after the implementation of conservation actions. The culmination of achieving outcomes ultimately lead to the ecological goals identified in **Section 5** above. (i.e., a desired status of the ecological priority).

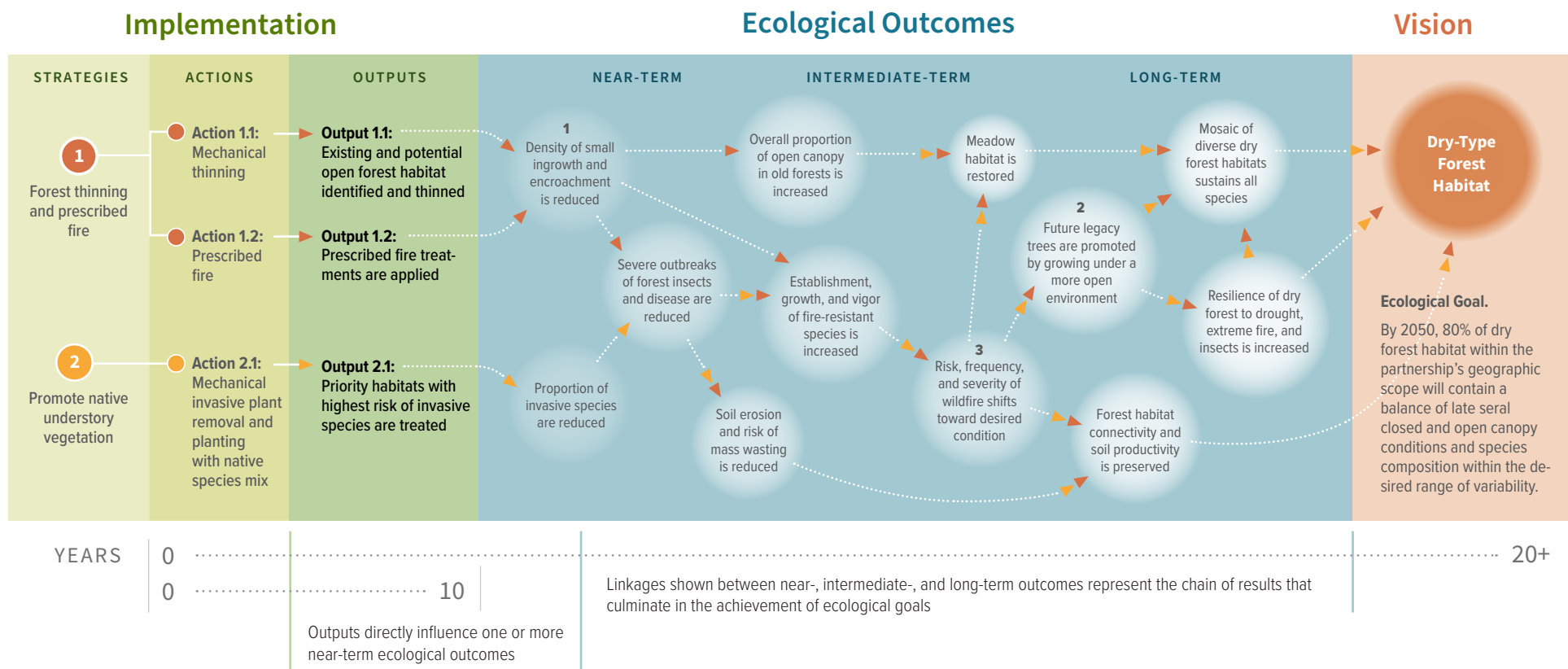
Examples of outcomes include:

increased landscape proportion of open forest canopy, increased resilience to extreme fire, disease, increased forest habitat connectivity, increased frequency of floodplain inundation, increase in stream shade, reductions in stream temperature, establishment of a native plant community, and reduced fire severity.

When community engagement is a key strategy include relevant outcomes such as an engaged and informed public.



FIGURE 1 Strategic Action Plan Theory of Change *Hypothetical theory of change for a partnership focused on a dry-type forest habitat ecological priority.*



SAP Progress Monitoring Framework

Implementation Progress

OUTPUT	OBJECTIVE (TARGET)	INDICATOR
1.1 Existing and potential open forest habitats are identified and thinned	1.1 By 2025, ecological thinning and other fuels reduction actions are implemented on 1,200 acres and treated sites are managed to promote native woody and herbaceous vegetation.	Acres treated by thinning
1.2 Prescribed fire treatments are applied	1.2 By 2025, prescribed fire treatments are applied on 500 acres and treated sites are managed to promote native woody and herbaceous vegetation.	Acres treated by prescribed fire
2.1 Priority habitats with highest risk of invasive species are treated	2.1 By 2025, 1,500 acres of high risk habitats are treated	Acres treated for invasive plant species

Ecological Progress *(Outcomes cross-reference with diagram above.)*

OUTCOME	OBJECTIVE (TARGET)	INDICATOR
1 Tree and fuels density is reduced	1 By 2030, density of ingrowth and encroachment is reduced by 50%	Small tree density
2 Growth of legacy trees accelerates to achieve mature forest	2 By 2050, density of future legacy trees increases by 15%	Number of future legacy trees per hectare
3 Risk, frequency, and severity of wildfire shifts toward desired conditions	3 By 2040, wildfire risk in treated areas is reduced by 50%	Modeled fire risk

Timelines for objectives in the Progress Monitoring Framework are shorter than timelines for the goal(s) for the ecological priority.

Work Plans and Reporting

After a SAP is completed, a partnership will develop annual or biennial work plans that will represent a subset of conservation actions that can be implemented within the specified timeframe. The scope of work plans contribute to the longer-term objectives defined in the Progress Monitoring Framework.

For each planning period, monitoring of outputs and outcomes will be implemented as part of a formal monitoring plan. Data will be reviewed after each planning period to evaluate progress and report results with the full partnership and external interested parties (e.g., funders, supporting organizations, etc.).

9 Progress Monitoring Framework

Purpose: To identify and assign values for the subset of key outputs and outcomes that will be monitored to track progress and inform adaptive management.

The **Progress Monitoring Framework** (PMF) summarizes a subset of key conservation outputs and ecological outcomes selected from the theory of change that can be monitored to measure implementation and ecological conservation progress (see **Figure 1**). Objectives will be defined for each key output and outcome against which progress can be evaluated. Creating a PMF for a limited timeline, e.g., six or ten years, can support greater accuracy in forecasting what conservation actions can realistically be accomplished. As implementation proceeds, partnerships may identify the need to adjust and update elements of the PMF based on what is learned from implementation or emerging new information (**Section 10**).

Defining SMART Objectives

- S Specific:** Clear, concise and to the point. A specific objective will answer the four W's: What, Why, Who, and Where.
- M Measurable:** Useful objectives are measurable and answer how much or how many.
- A Achievable:** Objectives must be realistic and attainable.
- R Results-oriented:** This stresses the importance of objectives that are dynamic and proactive and geared toward achieving results.
- T Time-based:** This stresses the importance of grounding objectives with a target timeframe.

Progress Monitoring Framework Development Process

Dry-type forest habitat ecological priority examples in this section are taken from the theory of change and PMF in **Figure 1** to help illustrate the relationship between these two elements.

A Select key conservation outputs and define objectives (targets) that will inform how progress is measured.

- i. Based on the theory of change, identify the **key conservation outputs** that represent the most informative reflections of implementation progress (the degree to which you are carrying out actions as planned).

These will likely be outputs that:

- Can be measured within a short timeframe after conservation actions are implemented
- Are the immediate condition created through implementation of the conservation action
- Will add to the understanding about linkages between outputs and outcomes
- Are likely to be valuable in communicating about implementation progress to stakeholders, funders, and the interested public

- ii. Define **objectives (targets)** for each selected key conservation output and indicators that will be measured to assess progress. Applying the principles of **“SMART” objectives** (see box) can be useful guidance for developing objectives.

The following example objectives are associated with specific conservation outputs that will be implemented over the timeframe of the SAP.

Dry-type forest habitat ecological priority

- By 2025, ecological thinning and fuels reduction actions are implemented and treated sites are managed to promote native woody and herbaceous vegetation on 1,200 acres within the partnerships' geographic scope. **Indicator:** *acres treated*
- By 2025, 1,500 acres of high-risk habitats are treated. **Indicator:** *acres treated for invasive plant species*

PMF Development Process, continued

Aquatic habitat for native fish species ecological priority

- By 2025, six water rights transactions are completed to restore 15 cubic feet per second of instream flow along 20 miles of Fish Creek.
Indicator: *number of transactions and cfs of flow affected*
- By 2026, 5 large wood habitat structures have been installed on priority reaches of Beaver Creek.
Indicator: *number of large wood structures installed*
- By 2027, 85% of invasive knotweed is removed from 44 acres of prioritized riparian habitat.
Indicators: *percent of knotweed cover removed; acres on which knotweed is removed*

iii. Identify the specific **conservation actions** you plan to implement to achieve the selected key outputs. The following examples are actions related to the example implementation outcomes above.

Dry-type forest habitat ecological priority

- **Output:** Ecological thinning and fuels reduction actions are implemented and treated sites are managed to promote native woody and herbaceous vegetation recovery.
Action: *Mechanical thinning of understory vegetation and small trees*
Action: *Prescribed fire to reduce understory fuels*
- **Output:** Priority habitats with highest risk of invasive species are treated.
Action: *Mechanical invasive plant removal*

Aquatic habitat for native fish species

- **Output:** Flow transactions are executed.
Action: *Develop water transactions in collaboration with specific targeted water rights holders*
- **Output:** Habitat function and structural actions are implemented.
Action: *Design and implement large wood installation at priority locations.*
- **Output:** Invasive plant densities are reduced in riparian areas.
Action: *Mechanical removal of knotweed*
Action: *Chemical treatment of knotweed*



PMF Development Process, continued

B Select key ecological outcomes and define objectives.

i. Identify **key ecological outcomes** in your theory of change.

Key outcomes will be those that:

- Can be measured over intermediate (years) to long (decades) timeframes after actions are implemented. Because outcomes represent biophysical responses to conservation actions, outcomes are achieved on longer timeframes (e.g., 3-10+ years) than outputs, which can often be measured shortly following implementation of a conservation action(s).
- Add to understanding and/or reduce uncertainty about the linkages between strategies, outputs, outcomes, and long-term ecological goals.
- Are likely to be valuable for communicating about conservation progress to stakeholders, funders, and the public.

ii. If possible, define **SMART objectives** for each key ecological outcome. Because outcomes are often influenced by inter-annual variability, random events, unrelated activities in the watershed and other external factors, it is often very difficult to identify a specific degree of change or a timeframe when an ecological outcome will be achieved. Given this limitation, consider using trajectories (usually toward a desired condition or away from a degraded condition) and ranges for describing as specifically as possible your anticipated outcomes.

The following example objectives are associated with specific conservation outcomes that are expected to result from the implementation of conservation actions.

Dry-type forest habitat ecological priority

Ecological Outcomes:

- Tree and fuels density is reduced. By 2030, density of ingrowth and encroachment is reduced by 50%.

Indicator: *tree density – number of trees per acre*

- Growth of legacy trees accelerates to achieve mature forest. By 2050, the density of future legacy trees increases by 15%.

Indicator: *number of future legacy trees per hectare*

- Risk, frequency, and severity of wildlife shifts toward desired conditions. By 2040, wildfire risk in treated areas is reduced by 50%.

Indicator: *modeled fire risk*

Aquatic habitat for native fish species

Ecological Outcomes:

- Stream temperature regime is restored to desired range. By 2050, seven-day moving average maximum stream temperature does not exceed 18 degrees Celsius.

Indicator: *percent of days meeting 18 °C*

- Flows support freshwater life history stages of native anadromous fish. By 2050, number of smolts per spawner increases by 50%.

Indicator: *number of smolt emigrants per year*

- Diversity, complexity, and structure of aquatic habitat is improved. By 2050, complexity of aquatic habitat in priority stream reaches increases by 25%.

Indicator: *number of in-channel and floodplain geomorphic units*

PMF Development Process, continued

C Indicators

- i. For both key outputs and outcomes, identify what indicators will be measured (and integrated into a formal monitoring plan) to evaluate progress and/or change. Indicators are specific, select metrics (measures) of a physical or biological parameter of the system in question, which the partnership considers will provide the best information or greatest insight about the outputs and outcomes. Example indicators are provided for each of the output and outcomes objectives above.

D Measuring and communicating progress

- i. Reference an existing science-based monitoring plan if one exists or indicate if one will be developed. A monitoring plan should outline monitoring questions, describe monitoring protocols (metrics, methods, and sampling design), and define data analysis, reporting and communication processes. See the **Monitoring Restoration Initiatives** guide for more information about how to develop a monitoring plan.
- ii. Describe how data will be managed to ensure data quality, accessibility, and ultimately the utility of collected data. Include a description of how data is stored, shared, analyzed and interpreted to inform management of the conservation program.
- iii. Summarize who will be responsible for collecting, compiling, interpreting and sharing the information within and beyond your partnership. Indicate roles and responsibilities for progress and effectiveness monitoring, including:
 - Partner roles and responsibilities
 - How and when results will be summarized and communicated within the partnership and to key stakeholders and funders
 - If the partnership will work with others (agencies, academia, larger conservation initiatives) to carry out monitoring responsibilities (sampling, data management, data analysis, reporting and relevant scales, etc.) and, if so, what will be the roles of those entities.



10 Adaptive Management

Purpose: *To describe the partnership's process for gathering, documenting, and analyzing monitoring data and new emerging knowledge and how decisions will be made to adapt strategies.*

Adaptive management is a systematic process for continually improving by learning from ongoing experience. The process is commonly described as an iterative cycle of planning (development of a SAP, monitoring plan, and annual or biennial workplans), implementing (implement conservation actions and monitoring), evaluating (analyze and interpret monitoring results and other relevant information), and adjusting (make changes to plans and actions if necessary).

When implemented effectively, this approach can yield substantial value, including:

- reducing uncertainty about the effectiveness of specific conservation actions;
- learning from and avoiding past mistakes;
- responding to new information and evolving conditions;
- achieving stated conservation goals and objectives more efficiently and effectively;
- increasing confidence and buy-in among partnership members and other stakeholders;
- developing and institutionalizing a practice of ongoing learning and improvement; and
- documenting lessons that can be applied elsewhere.

Using the guide *Adaptively Managing Restoration Initiatives*, describe how the partnership will structure and carry out an approach and process to adaptively manage conservation strategies outlined in the SAP.

- What value and benefit does the partnership expect to gain from a robust adaptive management framework and process and what is the partnership's commitment to allocate sufficient time and resources?
- Who will participate in each step or aspects of the adaptive management process and who will be responsible to lead and coordinate relevant activities?

For example, the adaptive management guide referenced above recommends considering the following participants:

- a** An individual or small group that acts as a strong advocate for the adaptive management process and manages communications with key partners and facilitate the process.
- b** Partners that are focused on action implementation.
- c** Technical experts who can provide guidance on data analysis and interpretation.
- d** Public or private landowners and managers who have jurisdiction over and interest in where projects are implemented and their impact.
- e** Funders and their review committees who have a strong interest in a project's successful implementation and contribution to long-term ecological outcomes.
- f** Regulatory agencies who have jurisdiction over specific kinds of actions and who must provide permissions.
- g** Any other interested or affected party.



11 Sustainability

Purpose: *To describe how the partnership plans to sustain its capacity to implement the SAP over its defined timeframe*

Provide a discussion of how the partnership will work to sustain its momentum over the timeframe needed to achieve its ecological goals and vision. There are at least three areas that should be addressed or considered in this section. **Those areas include:**

- 1) a plan to secure sufficient funding to implement necessary conservation actions to achieve stated conservation goals;
- 2) an approach to maintain critical functions and structural elements of the partnership needed to maintain its commitment, focus, and collaborative effectiveness, and
- 3) a plan to sustain capacity for efforts needed to track progress toward ecological goals.



12 Citations

If the SAP references specific documents, reports, plans, or peer reviewed manuscripts list them here. **Use a standard convention such as the following:**

Goldstein, B.E., W.H. Butler, and R.B. Hull. 2010. The Fire Learning Network: a promising conservation strategy for forestry. *Journal of Forestry* (April/May):120-125.

13 Partnership Certification

If the partnership determines it is appropriate, include the signature of the appropriate representative from each entity in the partnership.

CERTIFICATION: I certify that this strategic action plan is a true and accurate representation of the proposed work and that I am authorized to sign as the Partner Representative or Co-Representative(s).

- Partner Signature
- Partner Name, Printed
- Title
- Organization
- Date