

# BC Parks

## Protected Area Management Planning Process Manual

---





# TABLE OF CONTENTS

<b>PURPOSE OF THIS MANUAL .....</b>	<b>1</b>
<b>PART 1: INTRODUCTION TO MANAGEMENT PLANNING.....</b>	<b>2</b>
1.1    WHAT IS MANAGEMENT PLANNING? .....	2
1.2    WHAT IS A MANAGEMENT PLAN? .....	2
1.3    WHAT IS INVOLVED IN THE MANAGEMENT PLANNING PROCESS? .....	3
1.4    MANAGEMENT PLANNING PRINCIPLES .....	4
1.5    LEGAL AND POLICY FRAMEWORK FOR MANAGEMENT PLANNING IN BC.....	4
1.5.1 <i>Legislation</i> .....	4
1.5.2 <i>Strategic Direction</i> .....	5
1.5.3 <i>Operational Policies</i> .....	5
<b>PART 2: THE MANAGEMENT PLANNING PROCESS.....</b>	<b>7</b>
2.1    PRE-PLANNING ASSESSMENT .....	9
2.1.1 <i>Compile Existing Management Direction for the Area</i> .....	9
2.1.2 <i>Determine the Type of Management Planning Project</i> .....	9
2.1.3 <i>Administrative Update and Plan Amendment Procedures</i> .....	11
2.1.4 <i>Determine Management Planning Priorities</i> .....	13
2.2    INITIAL PLANNING STAGE.....	15
2.2.1 <i>Establish The Management Planning Planning Project Team</i> .....	15
2.2.2 <i>Gather Detailed Background Information</i> .....	21
2.2.3 <i>Determine the Scope and Complexity of the Project</i> .....	24
2.2.4 <i>Identify and Assess Key Management Issues and Opportunities</i> .....	26
2.2.5 <i>Develop a First Nations Engagement Plan</i> .....	28
2.2.6 <i>Develop a Public Engagement plan</i> .....	30
2.2.7 <i>Develop a Project Budget</i> .....	34
2.2.8 <i>Establish a Project Schedule</i> .....	35
2.2.9 <i>Assemble the Project Plan</i> .....	36
2.3    DRAFT MANAGEMENT PLAN PHASE .....	37
2.3.1 <i>Prepare the Draft Management Plan</i> .....	38
2.3.2 <i>Review and Approval of the Draft Management Plan</i> .....	38
2.3.3 <i>Release Draft Management Plan for Public Review</i> .....	39
2.4    FINAL MANAGEMENT PLAN PHASE.....	39
2.4.1 <i>Analyse Public Submissions</i> .....	40
2.4.2 <i>Finalise the Management Plan</i> .....	41
2.4.3 <i>Final Review and Approval of the Final Management Plan</i> .....	41

2.5	IMPLEMENTATION OF THE MANAGEMENT PLAN.....	42
2.5.1	<i>Distribute the Plan</i> .....	42
2.5.2	<i>Transfer Lead Implementation Role to Operational Staff</i> .....	42
2.6	MONITORING AND EVALUATION .....	43
2.6.1	<i>Internal Plan Assessment</i> .....	43
2.6.2	<i>Management Plan Review</i> .....	43

## LIST OF TABLES

Table 1:	Administrative update and plan amendment procedures .....	12
Table 2a:	BC Parks regional staff roles and responsibilities in management planning .....	16
Table 2b:	BC Parks headquarters staff roles and responsibilities in management planning .....	17
Table 3:	Example management planning team .....	19
Table 4:	Potential sources of background information for management planning projects .....	22
Table 5:	Example of management issues and opportunities summary.....	27
Table 6:	Assessing the expected level of public engagement .....	31
Table 7:	Choosing public engagement methods .....	32
Table 8:	Example of a management planning project budget.....	34
Table 9:	Example of a management planning project schedule.....	35

## LIST OF FIGURES

Figure 1:	Management Framework for BC Parks.....	6
Figure 2:	BC Parks Management Planning Process .....	8

## PURPOSE OF THIS MANUAL

This manual outlines the BC Parks approach to management planning for provincial protected areas. It is intended for use by anyone interested or involved in protected areas management planning in BC.

This manual aims to establish a straightforward and consistent management planning approach across the province. At the same time, the process is intended to be flexible and to allow planning teams to adapt to local circumstances and specific project needs.

While this document focuses on the management planning process, a companion document, the Guide to Writing Protected Area Management Plans, provides step-by-step guidance for developing management plan content and completing the BC Parks management plan template.

This manual is divided into two sections:

**Part 1: Introduction to Management Planning** provides the provincial context for protected areas management. It provides a brief introduction to management planning, describes the legal and policy context for management planning in BC Parks, and discusses other planning processes that might influence management direction.

**Part 2: The Management Planning Process** describes the steps involved in a management planning project, outlines the roles and responsibilities of BC Parks staff and other parties involved in the process, and discusses how to develop content for a BC Parks management planning project plan.

# PART 1: INTRODUCTION TO MANAGEMENT PLANNING

## 1.1 WHAT IS MANAGEMENT PLANNING?

Protected areas<sup>1</sup> administered by BC Parks must be managed effectively in order to maintain the features and values that make these places special. Effective management requires effective planning.

Effective management planning involves the development of a forward-looking vision for a particular protected area, and articulation of the strategic management direction needed to achieve that vision. More specifically, the process identifies important natural, cultural and recreation features and values for a particular protected area and determines the actions needed to maintain them. This strategic direction is documented in a management plan.

Management planning is an ongoing cycle of engagement, collecting and analyzing information, developing management direction, effectiveness monitoring and adjusting management direction as needed.

## 1.2 WHAT IS A MANAGEMENT PLAN?

A management plan is the written communication of the management vision and direction for a protected area. A management plan:

- situates the protected area within a landscape context, both geographically and as part of the protected areas network;
- articulates the key features and values of the protected area;
- identifies the types and levels of management activities;
- determines the appropriate levels of use and development;
- clearly establishes the long-term vision and management objectives to be met; and
- responds to current and predicted future threats and opportunities by defining a set of management strategies.

---

<sup>1</sup> In this manual, “protected areas” refers to all Class A and B parks, conservancies, protected areas, ecological reserves, and recreation areas established under the *Park Act*, *Protected Areas of British Columbia Act*, *Environment and Land Use Act* or *Ecological Reserve Act*.

### 1.3 WHAT IS INVOLVED IN THE MANAGEMENT PLANNING PROCESS?

The management planning process has six key steps:

- 1) **Pre-planning Assessment.** In this early phase, all existing management commitments (e.g., land use planning direction, government to government agreements, previous management plans) for a protected area are compiled, and regional planning staff determines where each potential management planning project fits within regional and provincial priorities (see section 2.1).
- 2) **Initial planning.** This stage involves: a review of existing information about the protected area's values and potential management issues; determining how complex the planning process needs to be; gauging First Nations, local community and public interests; developing a process to address identified interests; and establishing a planning team. More information on this stage is provided in section 2.2.

The outcome of the initial planning stage is a project plan<sup>2</sup> that must be prepared using the established BC Parks project plan template.

- 3) **Drafting the management plan.** During this stage, the planning team will identify the values, vision (the desired future condition) and principles that will guide future management of the protected area. Previously identified interests and issues are discussed, and appropriate management direction is developed in the form of a vision, management objectives and strategies, and a zoning plan.

The draft management plan must be prepared using the established BC Parks management plan template. As per the BC Parks policy, there must be an opportunity for public review and comment on the draft plan (see section 2.3).

- 4) **Finalising the management plan.** Strategic management direction is finalised at this stage of the process following the review and approval of a management plan by BC Parks decision makers. This stage may also involve approval of the final draft plan by First Nations or other partners (see section 2.4).

---

<sup>2</sup> The Project Plan replaces the Terms of Reference.

- 5) **Implementation.** Operational staff and partners carry out the strategies identified in the management plan (see section 2.5).
- 6) **Monitoring and evaluation.** The effectiveness of management activities and of the management plan itself must be assessed on a regular basis. As a result of this evaluation, management direction may need to be adjusted, or changes made to the plan due to changing societal, cultural or natural resource values associated with the protected area (see section 2.6).

## 1.4 MANAGEMENT PLANNING PRINCIPLES

The management planning process is guided by a set of principles outlined in the BC Parks Strategic Management Planning Policy. The subset listed below is particularly important to keep in mind when initiating and carrying out your management planning project:

- ❖ The management plan will be a scope and scale appropriate to the protected area.
- ❖ Management planning engages First Nations, the public and interest groups in a meaningful way.
- ❖ Management planning involves interagency cooperation and involvement (given that ecosystems, ecosystem services and human uses extend beyond protected area boundaries).
- ❖ A management plan is part of a management framework used to manage British Columbia's protected areas. Other parts of the framework include legislation, strategic policies and agreements, and operational policies and guidelines.

## 1.5 LEGAL AND POLICY FRAMEWORK FOR MANAGEMENT PLANNING IN BC

### 1.5.1 LEGISLATION

The *Park Act*, the *Protected Areas of British Columbia Act*, the *Environment and Land Use Act*, the *Ecological Reserve Act* and related regulations define the legal parameters within which protected areas must be managed (Figure 1).



## **1.5.2 STRATEGIC DIRECTION**

Land use plans provide strategic direction for landscape or regional level land and marine resource management within a defined geographical area. Land use plans may include direction for the establishment of protected areas and may outline activities permitted within those new protected areas. They may also identify specific issues that a management plan must address (e.g., motorised access).

Strategic direction may also be provided by government to government agreements with First Nations which can include direction for protected areas management (e.g., the Kunst'aa Guu-Kunst'aayh Reconciliation Protocol).

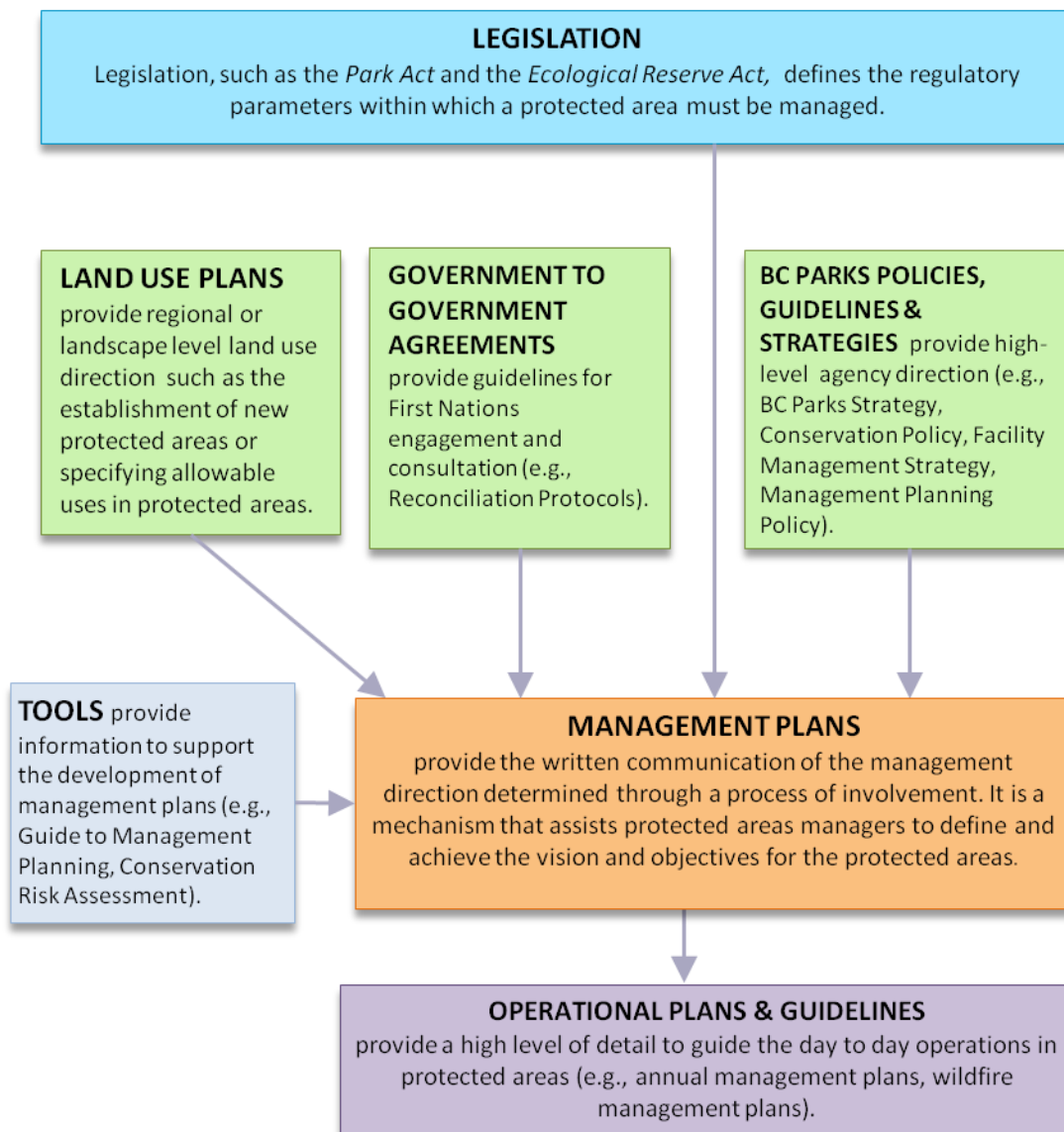
While there is no legal requirement to complete management plans for protected areas in British Columbia, BC Parks has committed through the BC Parks Strategic Management Planning Policy to ensure that the management of every protected area in the system is guided by a management plan.

BC Parks' strategic policy also provides high-level guidance related (but not limited) to: public engagement, First Nations consultation, management plan review, communication of management planning projects and products, zoning and development or expansion of protected area services.

Agency corporate plans (e.g., BC Parks Strategic Plan), policies (e.g., Conservation Policies), strategies (e.g., Facility Management Strategy) and guidelines (e.g., this document, the Guide to Writing Protected Area Management Plans) provide further direction for protected areas management planning.

## **1.5.3 OPERATIONAL POLICIES**

Operational policies and guidelines (e.g., annual management planning policy, wildfire management planning policy) provide detailed guidance for protected area managers and staff related to the on-the-ground, daily operations of specific protected areas. These policies and related business or operational planning processes may either inform, or be informed by the management planning process.



**Figure 1: Management Framework for BC Parks**

## PART 2: THE MANAGEMENT PLANNING PROCESS

The quality of a management plan usually reflects the quality of the planning process itself. A well designed and managed process contributes to an effective management plan.

There are six main steps in the BC Parks management planning process (Figure 2). The management planning process for a particular protected area (or areas) may be simple or complex depending on a number of factors including: the complexity of the protected area values, existing or future risks or threats to these values, the existence of conflicting or competing interests, the level of First Nation involvement, the level of community and public interest and involvement, and the existence of management issues arising from areas adjacent to or outside the protected area.

Management planning processes are often iterative. Although the following series of steps are clearly defined and must be completed for all projects (see Figure 2), work on multiple steps often occurs at the same time or certain steps may need to be revisited based on new information.

A management planning process may be carried out for a single protected area, or for a network of two or more contiguous protected areas with similar or related values and management objectives.



**Figure 2: BC Parks Management Planning Process**

## 2.1 PRE-PLANNING ASSESSMENT

Before a management planning process for a particular protected area is initiated, it is important to assess existing management direction (if any) to determine its continued relevancy, determine what type of project is required, and evaluate where the project fits within regional and provincial priorities. New projects should be brought forward during annual work planning activities.

### 2.1.1 COMPILE EXISTING MANAGEMENT DIRECTION FOR THE AREA

Established protected areas that have been in the system for many years may or may not have management direction associated with them. In the past, management direction has been provided in various types of documents including: management plans, management direction statements, purpose statements, master plans and interim management statements.

Since 1991, all new protected areas have been required to have a conservation risk assessment and a public safety risk assessment completed for them. Risk assessments for previously existing protected areas (established before 1991) are completed on a priority basis. For newly established protected areas, risk assessments should be completed as soon as the area is established, and may be the only existing source of management direction available for that area.

At this stage, it is also important to obtain copies of documents containing management commitments that have been established through higher level processes such as: strategic land use planning, formal agreements with First Nations, and land acquisition agreements with conservation partners (e.g., with non-profit organizations) or vendors.

All relevant background information and management direction documents specific to the protected area should be compiled in a background file.

### 2.1.2 DETERMINE THE TYPE OF MANAGEMENT PLANNING PROJECT

Potential management planning projects will take one of the three forms listed below (by decreasing level of complexity):

#### 1. **New management plan:**

A new management plan is required for all newly established protected areas and for areas that have no approved management direction (e.g., management plan, management direction statement, etc.). A new plan is also required when an existing

management direction document requires extensive revisions to properly address current or anticipated values and (or) management concerns associated with the protected area. For example, when entirely new sections need to be added to or deleted from the document.

**2. Plan amendment:**

An amendment may be appropriate when revisions to specific components of an existing management plan are needed to reflect changing conditions, but the majority of the plan remains unaffected. Examples of changing conditions include: identification of an important new resource value, a large natural disturbance event (e.g., a wildfire), proposed new visitor services, or recommendations resulting from effectiveness monitoring.

**3. Administrative update(s):**

An administrative update is appropriate when no substantive change to the original management direction is required, but an error or omission that is anticipated to have **no** First Nations or public interest is identified. Examples might include: spelling or grammatical errors, correcting inaccuracies in descriptive information about the area, or updates to maps contained in the management plan.

When a planner is determining the type of management planning project that is appropriate for a particular protected area, a number of considerations should be taken into account such as:

- ❖ The existence and adequacy of existing management direction (*is there a management plan in place? Is the existing plan adequate?*),
- ❖ The nature and scale of changing conditions within the protected area (*is there a need to refine or re-define management objectives or strategies for any reason?*),
- ❖ The level of public interest in the project/protected area (*have one or more First Nations or advocacy groups expressed an interest in the project?*),
- ❖ Available resources (*how much time/staff/budget is likely to be required versus what is available?*), or
- ❖ Regional or provincial priorities (see section 2.1.4).

One of the advantages of amending, rather than replacing an existing management plan, is that the process generally requires less time and fewer resources to complete because efforts are focused on specific aspects of the plan rather than the entire plan; in other

words, the planning project team is not starting from “square one”. Conversely, the risks of pursuing a management plan amendment in lieu of writing a new management plan could be: a piecemeal decision-making process that could overlook cumulative effects, the potential to solve one problem but inadvertently create another (“unintended consequences”), and the risk of greater long-term costs or disengagement if multiple amendments are needed in the future resulting in multiple planning projects.

If it is determined that a new management plan is required (after careful consideration of the above factors and dialogue with other staff), a full management planning process is necessary, beginning with the initial planning phase (see Section 2.2).

### **2.1.3 ADMINISTRATIVE UPDATE AND PLAN AMENDMENT PROCEDURES**

An administrative update involves very minor changes to an existing management plan. It can be completed at any time by planning staff and does not need to follow the steps outlined in this guide; most notably, it does not require First Nations or public consultation. Table 1 outlines the procedures for making plan amendments and administrative updates. It should be noted that in most cases administrative updates unless urgent will just be kept on file and changes made during a larger management plan amendment or new management plan project.

A management plan amendment project can be viewed as a modified or “scaled down” management planning process. The initial planning step is generally not required, the development of a project plan is optional and proposed changes to the management plan are documented using the BC Parks management plan amendment template. First Nations and public engagement are required.

**Table 1: Administrative update and plan amendment procedures**

Activity	Requirements	
	Administrative Update	Amendment
<b>Develop Project Plan</b>	Not required	Optional. Should be considered when undertaking complex amendments likely to produce significant public or political interest.
<b>Documentation of proposed changes</b>	An updated plan may be posted.	The proposed plan amendment(s) should be documented in the appropriate BC Parks amendment template.
<b>Date</b>	Update “date last updated” noted on inside front cover of the management plan.	Date on management plan cover is updated and original version date noted on inside front cover OR amendment document is posted with the original management plan.
<b>First Nations Consultation</b>	Likely not required, but subject to agreed upon processes in relevant agreements and provincial consultation policy.	Required and subject to agreed upon processes in relevant agreements and provincial consultation policy.
<b>Public Engagement and Communication</b>	<p>Public review and comment not required.</p> <p>Management plan is posted online.</p> <p>A notification and website link is sent to all relevant staff and interested parties (individuals, communities, groups).</p>	<p>Minimum 30-day web posting of approved amendment document.</p> <p>May require more complex analysis and public engagement (e.g., public events, newspaper ads, etc.).</p> <p>Notification and web link provided (via email) to staff and key interested parties (individuals, communities, groups) when amended plan is posted on the BC Parks website.</p>
<b>Internal Review and Approval(s)</b>	Approval from the Planning Section Head and Regional Director of addendum are required prior to public posting.	Review and approval process is the same as for new plans (see BC Parks Management Plan Review and Approval Guide) Final approvals from Regional Director and Executive Director, Parks Planning and Management are required.

*Note: If the original management plan is not in digital format, the hard copy should be scanned and posted on the website along with the addendum or amendment document.*



## 2.1.4 DETERMINE MANAGEMENT PLANNING PRIORITIES

Management planning priorities are established every year through dialogue between regional and provincial planning staff and decision makers.

The following criteria should be used to help determine management planning project priorities at both the provincial and regional levels. The list is not intended to be hierarchical, but legal obligations and formal agreements will have a very strong influence on annual management planning priorities.

- ❖ **Legal obligation:** There is a legal obligation to complete a management plan within a certain timeframe (e.g., terms of a purchase agreement with conservation partners).
- ❖ **Formal agreements:** There is a formal commitment to complete a management plan through a land use planning process or other formal agreement (e.g., a strategic engagement agreement).
- ❖ **In-progress projects:** A management planning process is already in progress and requires completion (unless a policy obstacle or other barrier to completing the management plan exists).
- ❖ **Efficiency:** Key players are already working on one management plan, and there is an opportunity to complete others in the same vicinity that would involve the same groups/individuals, even though the new project may be a lower priority.
- ❖ **Risk to protected area values:** One or more of the protected area's significant values face threats to their integrity and sustainability from internal or external sources (e.g., the existence of user conflicts that threaten important values or the quality of visitor experiences).
- ❖ **New activity/development:** Interest in new visitor services or resource uses arises for which no management direction exists.
- ❖ **External support:** Readiness of planning partners to engage and/or assist in the process. This is particularly important where First Nations partners are involved in the planning process.
- ❖ **Cost/benefit:** The benefits of doing the project now versus the costs of deferring the project provide an incentive to move forward.

In the absence of management direction for a given protected area (e.g., for newly established protected areas), the area is managed according to any risk assessments that have been completed, the BC Parks Strategic Plan and other relevant policies and strategies (e.g., BC Parks Conservation Policy, Facility Management Strategy, etc.).

### **Pre-planning Assessment Checklist**

- ✓ All existing management direction for the protected area has been compiled and stored in a file specific to the protected area or group of related protected areas.
- ✓ Risk assessments have been completed and copies obtained.
- ✓ The type of project has been determined (new plan, plan amendment or administrative update).
- ✓ The project has been identified as a provincial and (or) regional priority.

## 2.2 INITIAL PLANNING STAGE

The first step in this stage is to establish a management planning team and assign responsibilities to individuals on the team. Once established, the management planning team will start to gather information in order to get a better understanding of a project's scale and complexity. They will identify the reasons why the area was created, assess the level of First Nations' and public interest in the protected area, and determine the project budget and timeline. If a protected area has few management complexities and little First Nations or public interest, this stage may be completed in a very short time frame.

Based on the information gathered, the team will develop a project plan<sup>3</sup> using the BC Parks Project Plan Template. The final project plan must be approved by the responsible Regional Director and Manager, Planning and Land Administration.

This section of the manual walks through each step in the initial planning stage and guides the development of project plan content.

### 2.2.1 ESTABLISH THE MANAGEMENT PLANNING PROJECT TEAM

A management planning project team will be assembled by a **project lead**. The project lead is responsible for facilitating and completing the entire planning process, identifying and engaging potential partners, engaging other First Nations and interested parties (communities, individuals, organizations) and getting required approval(s) of the project plan, draft management plan and final management plan. The project lead is typically a BC Parks Planning Section Head or Regional Planner.

Tables 2a and 2b outline the various roles and responsibilities of other BC Parks regional and provincial staff in the management planning process. Staff may either be directly involved in the project as a member of the planning project team, or may provide project support in other ways such as: reviewing project documents, providing strategic policy or operational advice and supporting engagement activities.

---

<sup>3</sup> For past or ongoing projects, this document may also be called a "Terms of Reference".

**Table 2a: BC Parks regional staff roles and responsibilities in management planning**

Regional Staff	
Position	Key Responsibilities
Planning Section Head Regional Planner	<ul style="list-style-type: none"> <li>• Typically the <b>project lead</b> for management planning projects.</li> <li>• The project lead assembles and leads the planning project team, develops management planning products and ensures that all required document reviews and approvals are completed.</li> <li>• If not the lead, may provide project support including review of project documents or participate on the planning project team.</li> <li>• Leads First Nations and public engagement in planning projects.</li> </ul>
Conservation Specialist Recreation Section Head Area Supervisor Protected Areas Section Head	<ul style="list-style-type: none"> <li>• Provide project support by reviewing documents or participating on the planning project team, with a focus on the appropriate program aspects of the management planning project (conservation, recreation, operations).</li> <li>• May take a lead role in the implementation, monitoring or evaluation of the management plan.</li> </ul>
Regional Director	<ul style="list-style-type: none"> <li>• Accountable for ensuring that priority management plans are completed.</li> <li>• Accountable for ensuring management plan is consistent with provincial policy direction and regional priorities.</li> <li>• Accountable for ensuring that the management plan meets a high standard in terms of style and writing quality.</li> <li>• Accountable for approval of the project plan, the draft management plan and the final management plan.</li> <li>• Accountable for the implementation, monitoring and review of the final management plan.</li> </ul>

**Table 2b: BC Parks headquarters staff roles and responsibilities in management planning**

Headquarters Staff (Victoria)	
Position	Key Responsibilities
Management Planning Coordinator	<ul style="list-style-type: none"> <li>• Coordinates and facilitates headquarters review and approval of project documents.</li> <li>• Tracks and reports on progress of management planning program.</li> <li>• Ensures consistency of management planning products across the province.</li> <li>• Ensures that management planning documents meet a high standard of content, style and writing quality.</li> </ul>
Senior Protected Areas Planner(s)	<ul style="list-style-type: none"> <li>• Provide(s) project support with a focus on reviewing draft management plans and ensuring document quality and compliance with provincial legislation, policy and guidelines.</li> </ul>
BC Parks First Nations Planner	<ul style="list-style-type: none"> <li>• Provides optional project support, with a focus on First Nations program aspects of the management planning project including legal consultation obligations</li> <li>• Reviews draft management plan prior to posting (as required).</li> </ul>
Visitor Services Branch Representative	<ul style="list-style-type: none"> <li>• Provides project support, with a focus on program-specific aspects of the management planning project (i.e., conservation, visitor services and recreation opportunities).</li> </ul>
Conservation Program Representative	<ul style="list-style-type: none"> <li>• Reviews draft management plan prior to public posting.</li> </ul>
Manager, Planning and Land Administration	<ul style="list-style-type: none"> <li>• Reviews the draft project plan.</li> <li>• Reviews and approves the draft management plan prior to public posting</li> <li>• Reviews and recommends approval of final management plan.</li> <li>• Provides project support, with a focus on project compliance with legislation, regulations and policies.</li> </ul>
Executive Director, BC Parks Provincial Services Branch	<ul style="list-style-type: none"> <li>• Accountable for final management plan review and approval</li> <li>• Accountable for consistency with provincial legislation, policy and guidelines.</li> <li>• Provides strategic direction for management planning policy and guidelines.</li> </ul>

The size and composition of a planning project team will depend on the complexity of the project. Table 3 provides an example of a typical planning project team. Team members support the project lead by taking responsibility for various aspects of coordination and decision-making and for incorporating expertise from different program or business areas. Using a team approach will not only strengthen the management plan, but will also help to foster a sense of ownership and commitment to the project.

Teams should generally include a representative from each BC Parks program area: (a) planning, (b) conservation, (c) recreation, and (d) operations. Teams often include one or more First Nations representative, especially when the management plan is being developed under a collaborative management agreement.

A management planning process can also be led by an external party. If preparation of the management plan is to be led by an external group or contractor, a BC Parks staff member must be accountable for the work of the external party.

Most collaborative management agreements<sup>4</sup> with First Nations specify that parties will work collaboratively to develop protected area management plans. In these cases, the process could be led by a First Nations community member or representative. The project lead should consider the following questions when assembling the planning project team:

- Has everyone on the proposed management planning team confirmed that they are able to devote the appropriate time and effort over the expected length of the project?
- Has the project been identified in appropriate BC Parks' business plans and staff workplans to ensure staff availability?
- How will the management planning team communicate and share project information? Where will project information be stored?

---

<sup>4</sup> A collaborative management agreement (CMA) is an agreement between BC Parks and a First Nation that assists in the development of a collaborative relationship between the First Nation and BC Parks with respect to planning, management and use of the protected areas within the traditional territory of the First Nation and recognizes the First Nation's aboriginal rights in the planning, management and use of those protected areas.

**Table 3: Example management planning project team**

Name	Position	Responsibility
Anne Gray	Planning Section Head, BC Parks	<ul style="list-style-type: none"><li>• Project Lead</li><li>• Primary internal and external BC Parks contact for the project.</li><li>• Responsible for the development of the project plan, the draft management plan and the final management plan.</li><li>• Takes the lead role in coordinating and facilitating planning team members' involvement in the project, including the regional component of document reviews and approvals.</li><li>• Ensures management plan consistency with legislation, management planning policy, other policy direction and review and approval requirements.</li><li>• Supports the implementation, monitoring and evaluation of the final management plan.</li></ul>
Adam Blunden	_____ First Nation	<ul style="list-style-type: none"><li>• Primary First Nation contact for the project.</li><li>• Assists in the development of the project plan.</li><li>• Provides direction and support to compile background information.</li><li>• Provides input and support during the drafting of the management plan.</li><li>• Reviews and comments on the draft management plan.</li><li>• Co-ordinates _____ First Nation's review and approval process.</li><li>• May assist with the engagement of other affected First Nations.</li></ul>
Catherine Hill	Recreation Section Head, BC Parks	<ul style="list-style-type: none"><li>• Provides project support, with a focus on the recreation program aspects of the management planning project.</li></ul>
Darcy Burke	Area Supervisor, BC Parks	<ul style="list-style-type: none"><li>• Provides project support, with a focus on the operational program aspects of the management planning project.</li></ul>
Ross Halkett	Conservation Specialist, BC Parks	<ul style="list-style-type: none"><li>• Provides project support, with a focus on the conservation program aspects of the management planning project.</li></ul>

Information about the management planning team members and their responsibilities must be included in the project plan.

## **Engaging Volunteers**

The project lead should also consider involving volunteers (e.g., subject experts, university students, community groups) in the project. Volunteer participation can involve a range of activities (e.g., working on a portion of the document, gathering background information, scoping issues, coordinating community involvement, etc.) and BC Parks has used volunteers for the preparation of management plans on several occasions.

The extent to which a particular volunteer should be delegated responsibilities is based on a combination of the volunteer's relevant experience, knowledge and skills as well as the nature of the planning project itself. More complex or challenging planning projects may benefit from additional volunteer capacity or local experts with in-depth knowledge of a particular protected area.

If a planning project team chooses to engage a volunteer, they must ensure that the volunteer has no conflict of interest and will be viewed as impartial by First Nations and the public. They should also ensure that the volunteer is able to contribute adequate time to the project. Finally, the project lead should carefully consider the level of supervision that a particular volunteer will need and the time commitment that providing this support will involve.



## 2.2.2 GATHER DETAILED BACKGROUND INFORMATION

Next, compile and review existing information to help identify key management issues, define project scope and timelines, and develop a consultation plan. To begin, ensure that you have collected basic descriptive information for the protected area including:

- ✓ Official protected area name (from legislation/order in council)
- ✓ Date of establishment (from legislation/order in council)
- ✓ Protected area location (from legislation/order in council)
- ✓ Protected area size (from legislation/order in council)
- ✓ Main access routes and access methods

Usually a protected area has been established on the basis of an initial set of data. The planning team should start by investigating these data sources and obtain copies of any related documents. There may be documents produced by other agencies with previous jurisdiction over the area (e.g., BC Forest Service) or information about concerns raised by First Nations, local communities or project partners in the past. Remember that in the pre-planning assessment phase, a number of documents will have already been gathered including the conservation and facility risk assessments, and existing management planning products for the site.

Additional documents about the site that should be collated include (but may not be limited to):

- ❖ Land status file (also known as “Green Files”),
- ❖ Research reports and studies about the protected area or resources within the protected area (e.g., traditional use studies, species at risk recovery plans),
- ❖ Existing agreements with First Nations (e.g., collaborative management agreement),
- ❖ Land Use Plans that recommended the establishment of the protected area,
- ❖ Previous BC Parks’ Impact Assessment reports, and
- ❖ Annual management plans.

Given that protected areas do not exist in isolation they should not be managed as such. Particularly if the protected area is small in size or its boundaries are not based on natural boundaries (e.g., a watershed boundary, a river), adjacent land or water use can have an impact on values within the protected area. The protected area may also be part of a network or complex of contiguous protected areas with related management goals. For this reason, you should also review and collate the following documents (if they exist):

- ❖ Regional plans (e.g., strategic land use plan, tourism plan, recreation plan, forest management plan, economic development plan),
- ❖ Management plans for contiguous protected areas,
- ❖ Forest stewardship plans for adjacent forest lands, and
- ❖ Regional climate action plans.

Planning project teams may also need to consider relevant national and international obligations such as national historic sites, UNESCO World Heritage Status and Ramsar Convention commitments.

## Tools and Resources

There are a number of tools and data sources that may also be valuable for informing the protected area planning process (Table 4). The list includes spatial/analytical tools, search engines, websites (internal and external) and some policy or guideline documents. Tools highlighted in bold text have been identified as either most frequently used or as having the most value for management planning by BC Parks planning staff.

**Table 4: Potential sources of background information for management planning projects**

<b>Natural Heritage Values/Resources</b>
<ul style="list-style-type: none"> <li>▪ Cross-Linked Information Resources (CLIR) – allows the user to search multiple conservation-oriented databases simultaneously</li> <li>▪ BC Conservation Framework</li> <li>▪ Hectares BC</li> <li>▪ BC Species Explorer</li> <li>▪ BC Parks Attendance and Conservation Risk Assessment System (restricted access)</li> <li>▪ Conservation Data Centre</li> <li>▪ EcoCat (Ecological Reports Catalogue)</li> <li>▪ Species Inventory Web Explorer (SIWE)</li> <li>▪ BC Geographical Names Database</li> <li>▪ Habitat Wizard</li> <li>▪ Fisheries Inventory Data Queries warehouse</li> <li>▪ GoFishBC</li> <li>▪ Marine Protected Areas Database</li> </ul>
<b>Recreation Resource Values and Visitor Services Information</b>
<ul style="list-style-type: none"> <li>▪ Visitor use statistics</li> <li>▪ Park and Protected Area Maintenance Information</li> <li>▪ BC Parks Attendance and Conservation Risk Assessment System (restricted access)</li> <li>▪ BC Parks Facility Management System</li> </ul>

### **Cultural Heritage Values/Resources**

- Remote Access Archaeological Database (RAAD) (restricted access)
- Provincial Archaeology Support Library (restricted access)
- Traditional Use Study database (restricted access)
- BC Parks Attendance and Conservation Risk Assessment System (restricted access)

### **First Nations Consultation**

- Ministry of Aboriginal Relations and Reconciliation Intranet site
- Updated Procedures for Meeting Legal Obligations When Consulting with First Nations
- Aboriginal Relations E-Guide and Tools
- Cross-agency Aboriginal Relations Teams (CAARTs) (restricted access to teams' individual sharepoint sites)
- AECIS (Aboriginal Engagement Corporate Information Site) (restricted)
- Consultative Areas Database (CAD) (restricted)
- First Nations Quick Queries (FNQ2) (restricted)
- Collaborative Management Agreements
- Strategic Engagement Agreements (internal website)
- Consultation and Accommodation: Practices from Provincial Staff (internal report)
- BC Parks First Nations consultation records

### **Mapping**

- IMap
- ArcMap/ArcGIS (restricted – requires DTS access)

### **Protected Areas information**

- Protected Areas Registry (PAR) (internal – restricted access)
- Protected Areas System Overview (PASO)
- BC Parks Intranet (internal website – restricted access)
- BC Parks Internet

### **Land Status and Administration**

- BC Online (restricted access) – land status and administration information
- Integrated Land Resource Registry
- Tantalus (Gator)
- Mineral Titles Online

### **Other Information Sources**

- Lease agreements and contracts
- Past media reports about the area
- Previous briefing notes, government correspondence
- Onsite visit, or notes/photos from previous onsite visits
- BC Parks' staff/volunteers/park facility operators
- First Nations
- Permit holders
- Park users
- Other provincial government agencies
- Other levels of government
- Groups and associations ('Friends of', museums, recreation, conservation, naturalists, etc)

### **Addressing Information Gaps**

After reviewing available information for a given protected area, the planning project team may identify important information gaps and in some cases may conclude that there isn't sufficient primary data to fully support or inform management planning. If this is the case and if available resources allow, further data collection may be necessary at an early stage of the planning process in order to effectively carry out management planning.

In other cases, information gaps may mean that certain aspects of the protected area's management can't be adequately assessed and addressed. Under these circumstances, management planning should proceed, but the information gaps should be clearly documented at this early stage of the process as well as in the resulting management plan. It is possible that obtaining more thorough information related to a particular aspect of the plan will become an objective within the plan itself.

### **Preparing a background document**

In complex management planning projects, the project lead may wish to prepare a formal background document to assist with First Nations', public and interested communities' involvement in the project. The document may be used to facilitate discussions at consultation events and (or) posted on the BC Parks' website.

## **2.2.3 DETERMINE THE SCOPE AND COMPLEXITY OF THE PROJECT**

The project lead must ensure that the scope, scale and complexity of the management planning project and resulting management plan are appropriate for the protected area and that the project makes efficient use of limited resources.

If the management issues for a particular area are simple, there are few important values being addressed in the plan, or the protected area is very small, a very simple planning process with minimal public consultation is often appropriate. The resulting management plan should therefore also be simple and brief. Conversely, if management issues are contentious, there are multiple or complex values that must be addressed, an area is very large, or First Nations or public interest in the protected area is extensive, a more comprehensive planning process with considerable public involvement is likely appropriate and the resulting management plan will also need to reflect this complexity.

Determining a planning project's complexity is relatively subjective and is often based on past experience with similar projects. If this is your first time leading a management planning process, it will be very helpful to draw on the experience and expertise of planning colleagues in your region or elsewhere in the province when evaluating the scope and potential resource needs of a new project.

Management plan amendment projects that encompass only a portion of a protected area may be supported. If a new plan is being developed, it must be completed for the entire protected area.

### **When is it appropriate to combine management planning projects?**

It may be appropriate and strategic to combine multiple protected areas into one management planning project with one or more management plans as the final product(s). This approach often uses fewer resources to achieve a particular set of outcomes, and may be appropriate if:

- ✓ the protected areas are contiguous,
- ✓ numerous protected areas involve the same interested communities,
- ✓ numerous protected areas are addressed under the same collaborative management agreement with a particular First Nation, or
- ✓ the protected areas have similar management issues, uses, environmental stressors or visitor use impacts.

## 2.2.4 IDENTIFY AND ASSESS KEY MANAGEMENT ISSUES AND OPPORTUNITIES

After background information has been compiled, and the expected scope of the project is determined, specific management issues and opportunities (management considerations) should be identified. This is a chance for the management planning team to discuss and agree on the known values and interests that are likely to arise during the planning process, and that the plan therefore *must* address. The planning team should also document management considerations that will *not be* addressed during the planning process along with a clear rationale for each decision.

Formally gathering First Nations or public input to inform early planning team discussions may be appropriate, particularly for more complex projects. Various approaches and tools can be used to gather this input. For example, posting an online comment form on the BC Parks website or holding a community meeting are approaches that have frequently been used for this purpose in the past.

At this early stage, the issues and opportunities list should be viewed as preliminary and will be revisited as the management planning process proceeds and new information emerges. As the team proceeds with creating the list, it should also identify individuals and (or) groups that are likely to be interested in each issue or opportunity and how they will be engaged in the project.

Finally, the team should highlight potentially high-profile issues that are expected to generate a high degree of scrutiny or public debate so that appropriate internal communication occurs (e.g., notifying BC Parks executive), schedules and resources can be allocated accordingly and additional document reviews are considered. Management issues/opportunities are more likely to be high-profile when:

- ✓ a prior interest in the issue/opportunity has been repeatedly or publicly expressed by an individual or local community interest group (e.g., a conservation group, recreation association) but has not been resolved or addressed;
- ✓ perceived impacts are closely related to another major issue over which there is continuing interest, conflict or political debate (e.g., a linear infrastructure project such as a pipeline in the region, economic development opportunities), or
- ✓ the issue is considered critical to maintaining values that are locally, provincially or nationally significant.

Known management issues and opportunities are summarized in the Project Plan. Table 5 provides an example of a management issues and opportunities summary.

**Table 5: Example of management issues and opportunities summary**

Key Topic, Value or Theme	Management Issue(s) and Opportunities
Incorporating Blue Sky LRMP management direction	<ul style="list-style-type: none"> <li>• Wilderness Park was recommended for its special natural, recreational and/or cultural values in the Blue Sky LRMP. The management plan will need to address specific management issues related to these values that are identified in the LRMP.</li> </ul>
Impacts of adjacent resource development	<ul style="list-style-type: none"> <li>• Increasing industrial forestry activities immediately adjacent to park boundaries have raised public concerns about increased snowmobile activity in the Rock Valley.</li> <li>• Edge effects (e.g., windthrow) have been observed along the park boundary and may require improved collaboration with local forestry companies.</li> </ul>
Protecting social, ceremonial and cultural values/uses and interests of the First Nations	<ul style="list-style-type: none"> <li>• Two First Nations have identified cultural use sites within the park and two known archaeological sites (a historic trail and clam bed) are present in the park but not yet registered with the province.</li> <li>• First Nations have expressed interest in limiting public access to the cultural use sites, which are still being used by several band members for plant gathering and summer camping.</li> </ul>
Biological diversity and natural environment values	<ul style="list-style-type: none"> <li>• Baseline ecological knowledge/data are lacking for some of the ecological reserve’s ecosystems. These information gaps hinder staff’s ability to understand conservation issues and to set and implement appropriate management actions. The management plan will identify what knowledge gaps need to be addressed to ensure provincial conservation commitments are met.</li> <li>• A small but growing section of Scotch Broom has become established in close proximity to the main campsite. Invasive plant management techniques are needed to gain control over the spread of this and other invasive plant species in the vicinity of the campground.</li> <li>• Due to fire suppression since the park’s establishment, fuel loading and forest encroachment are evident in the park’s small fescue grassland area. Management direction is required to determine whether controlled burning is needed in this area to re-establish the grassland ecosystem.</li> </ul>

## 2.2.5 DEVELOP A FIRST NATIONS ENGAGEMENT PLAN

First Nations communities are intrinsically connected to, and often have an interest in the continued use of land and water resources in protected areas. It is critical to recognize that BC Parks has a legal duty to consult with First Nations on management decisions that may affect asserted Aboriginal rights and title within protected areas.

For some protected areas, one or more Collaborative Management Agreements between BC Parks and a First Nation may be in place, which typically include guidelines for the involvement of First Nations in protected areas management planning.

Different approaches for addressing First Nations interests within the protected area should be discussed during consultation, such as cultural zoning or using specific management objectives and strategies to protect cultural heritage resources and (or) address ongoing cultural use of resources within the protected area. Early and ongoing discussions can help both BC Parks and First Nations to determine if proposed management decisions might cause adverse impacts on proven or asserted aboriginal rights or title.

Table 4 above provides a list of several valuable tools to inform First Nations consultation and engagement during the management planning process.

Outside of the formal consultation process, First Nations may be involved on the management planning team, be partners in the management planning process, play an advisory role at one or more stages, or have very minimal interest in engaging in the project. First Nations should be involved in determining the approach that will work best for them.



**Tips for successful First Nations engagement in management planning:**

- ❖ Focus on developing strong working relationships prior to initiating management planning projects and continue to develop relationships and trust throughout the process.
- ❖ Speak with First Nations' representatives early in the planning process and provide ongoing opportunities for involvement that are responsive to First Nations' needs, preferences and available resources.
- ❖ Have face to face meetings wherever practicable.
- ❖ Become informed about local First Nations' relationship with the land and the protected area and respect that relationship in the planning process.
- ❖ Consider any information or planning documents that First Nations have previously developed for the area in the planning process; obtain copies for the project file (with permission from the First Nation).
- ❖ Keep records of discussions with First Nations and comments received on management planning documents. Share these records with First Nations.

## 2.2.6 DEVELOP A PUBLIC ENGAGEMENT PLAN

The quality of a management plan usually reflects the quality of the planning process itself. A well designed and managed public engagement process contributes to an effective management plan.

At the beginning of the management planning project, the project team should develop a public engagement strategy for the project to be included in the Project Plan. The process includes assessing the overall level of public interest in the process, identifying specific individuals or groups that are expected to have an interest in the planning process, identifying appropriate engagement strategies and determining a project timeline. It is important that BC Parks is consistent in the timing and methods used to engage the public in management planning projects. At the same time, the process is intended to be flexible and to allow project teams to adapt to local circumstances and specific project needs.

Some management plans will be written with minimal involvement by the public while others will require extensive involvement throughout the process. In all cases, the public must be given an opportunity for involvement in the preparation of management plans. Although specific First Nations engagement activities will be conducted during the process, First Nations should also be made aware of, and have the opportunity to, participate in all public engagement opportunities.

### **Assessing Overall Public Interest in the Planning Process**

Assessing the overall level of public interest in the management of a particular protected area is a good first step to help determine the engagement strategy (Table 1). This assessment will be a qualitative one and will be informed by the project team's knowledge of the local situation and specific project needs.

On occasion, the only way to assess interest is to meet with communities, individuals or interest groups, and discuss their interests, and ask for their perspectives on what level and type of participation or engagement in the planning process is appropriate. These early interviews or small group meetings can play an important role in developing a successful engagement plan for some projects.

In general, if you have circled the "High" column for several of the questions in Table 6, you should consider using more involved methods of public engagement. If you have not circled "High" in response to any of the questions, your engagement strategy will likely be less involved.

**Table 6: Assessing the expected level of public engagement**

Expected Level of Interest	Low	Medium	High
Protected area is of provincial significance?	No		Yes
Known precedent-setting issue(s) involved?	No		Yes
<b>Recreation</b>			
Interest from organised recreation groups?	None/Little	Some	Many/High
Public demand for recreation use in the area?	None/Little	Some	High
Range of recreation activities in the area?	Few		Many
Are there recreation permit holders?	None	Some	Several
What is the visitation trend for the area?	Declining	Stable	Increasing
<b>Natural Environment</b>			
Level of public support for protection?	Low	Some	High
Presence of rare or endangered species/ecosystems?	None	Some	Many
Known threats to natural resource values?	None	Some	Many
Interest of organised conservation groups?	None/Little	Some	Many/High
Known research interests?	None	Some	High
Presence of culturally significant sites?	None	Some	Many
<b>Resource Use</b>			
Known resource use interests?	No		Yes
Existing resource use or tenures?	No		Yes
<b>Local Population</b>			
Proximity of local population?	>200km	50-200km	<50km
Local population growth trend?	Declining	Stable	Increasing

## Public Engagement Methods

The complexity of the engagement strategy and methods used should reflect the desired level of public involvement. Project teams are encouraged to be creative and innovative in their public engagement approaches. Table 7 provides an overview of engagement

methods that are required and others that may be appropriate at various stages of the planning process. ★ Red symbol indicates a minimum requirement.

Table 7: Choosing public engagement methods

<b>Initial Planning</b>			
(A) Early Meetings with Interested Parties to Assist in Project Plan Development	Where need or commitments exist	Where need or commitments exist	Where need or commitments exist
(B) Public Notice that Project has been Initiated	★	★	★
<b>Draft Management Plan</b>			
(C) Initial Public Comment Period to Gather Background Information and Scope Issues	Where need or commitments exist	Where need or commitments exist	Where need or commitments exist
(D) Initial Public Event(s) (e.g., open house) to Gather Background	Where need or commitments exist	Where need or commitments exist	Where need or commitments exist
(E) Meetings/Correspondence with key parties potentially impacted by proposed direction in Draft Management Plan in advance of public release.	Where need or commitments exist	Where need or commitments exist	Where need or commitments exist
(F) Release of Draft Management Plan to Public and Key Stakeholders	30 days ★	30 days ★	30 days ★ 30 days + (Where need or commitments exist)
(G) Public Event(s) (e.g., open house) for Draft Management Plan	Where need or commitments exist	Where need or commitments exist	Where need or commitments exist
(H) Face to Face Meetings with Interested Parties	Where need or commitments exist	Where need or commitments exist	Where need or commitments exist
<b>Final Management Plan</b>			
(I) Notifying Key Parties about Relevant Final Management Plan Recommendations Prior to Public Release	Where need or commitments exist	Where need or commitments exist	Where need or commitments exist
(J) Public Signing Ceremony/Event for the Final Management Plan	Where need or commitment exist	Where need or commitments exist	Where need or commitments exist
(K) Public Release of Final Management Plan	★	★	★

## Determining the List of Interested Parties

The Project Lead should compile a list of all individuals, communities and groups that are likely to be interested in participating in the management planning process (the “interested parties”). It is also important to consider individuals or groups who have a less obvious or direct relationship to the area. The planning project team will often be able to develop a comprehensive preliminary list given that members were selected due to their knowledge and expertise about the local area. As the process continues, other interested parties will likely be identified but this preliminary list forms the basis for the engagement plan.

Be aware that there may be special engagement requirements laid out in a Memorandum of Understanding (MOU) or other agreement between BC Parks and another agency or interest group that will need to be considered in the public engagement strategy. Also, be aware of any cultural/ethnic sensitivity that may impact a group’s preferred method of engagement.

Next, identify key contacts and specify what their particular issue/interest is (if known). It may be useful at this point to contact some of these parties directly (if time and resources allow) to gain a better sense of their concerns and level of interest in the project. Adjust your engagement plan as needed.

The text below provides an example of a public engagement plan - a component of the Project Plan.

### **Example Public Engagement Plan**

#### **Proposed engagement approach/methods:**

- Initial public input process will begin concurrently with First Nations consultation.
- BC Parks’ website and visitor comment forms will be used to obtain initial public input and to identify additional key interests.
- Meetings will be set up with both the Spruce Snowmobile Association and the Pineview Mountain Bike Association to discuss their interests.
- A workshop will be organized for the two nearby communities (Sprucetree and Pineview) to discuss the draft management plan before the 30 day review and comment period.
- The draft management plan will be made available for public review on the BC Parks’ website.
- An additional open house may be held for the broader public to discuss the draft management plan if deemed necessary.

**Preliminary list of interested parties:**

- Local chapter of the Alpine Club of Canada
- Park Facility Operator
- Pine Wildlife Association
- Pineview Mountain Biking Association
- Spruce Snowmobile Association

**Expected Level of Public Interest: Medium**

The project is expected to generate significant interest in the local community due to: competing views on mechanized access to the park, a number of red-listed species being located in the park, and some interest from the local mountain biking association in developing new trails within the park.

### 2.2.7 DEVELOP A PROJECT BUDGET

A realistic budget appraisal should be done at the start of the management planning process. Bear in mind that the project may take several years to complete. Where required resources are not available, the project may need to be deferred or additional resources sought. If the planning process is expected to span more than one fiscal year, budget costs should be split by fiscal year. Costs being covered by an external agency (e.g., a management planning partner, grant, other Ministry) should be specified in the budget. An example of a proposed budget is shown in Table 8; the project budget is another component of the project plan.

**Table 8: Example of a management planning project budget**

Expenses 2011/12	2011/2012	2012/2013	Totals
Open house advertising	\$100	\$300	\$400
Open house meetings expenses, rentals, food	\$800	\$800	\$1,600
Planning group field trip to the protected area and meeting travel expenses (cost share with First Nation partners)	\$1,500	-	\$1,500
Display material for community meetings and open houses	\$600	\$600	\$1,200
Community workshops – lunch, hall rental	\$800	\$400	\$1,200
Community meetings (cost share with First Nation partners)	\$4,000	-	\$4,000

Community meetings (Internal funding)		\$2,000	\$2,000
<b>Total Expenses</b>	<b>\$7,800</b>	<b>\$3,100</b>	<b>\$11,900</b>

Budgets for individual projects will vary greatly depending on the complexity of the project, costs associated with information gathering, First Nations involvement, the public engagement strategy, and the number of expected site visits and other travel (e.g., for face to face meetings).

## 2.2.8 ESTABLISH A PROJECT SCHEDULE

The time needed to complete an approved management plan, for even a small area, is rarely less than six months. Where extensive consultation is required or complex issues must be addressed, it may take considerably more time.

An example of a project schedule is provided in Table 9. The project schedule will also be part of the project plan.

**Table 9: Example of a management planning project schedule**

Project Phase	Task	Target Date
<b>Initial Planning</b>	• Initiate project plan development	October 2011
	• Obtain project plan approval	January 2012
<b>Draft Management Plan</b>	• Arrange in-person meetings with respective First Nations for identification of traditional/cultural values.	Initiate February 2012
	• Prepare the preliminary draft management plan	May 2012
	• Draft management plan available for internal reviews	
	• Prepare draft management plan for public review based on preliminary review comments	July 2012
• Hold open houses/public meetings (locations to be determined) for public review of draft management plan		
<b>Final</b>	• Review and compile public input	August 2012

<b>Management Plan</b>	• Conduct final management plan review	September 2012
	• Obtain BC Parks and First Nations approvals of the final management plan	November 2012

## 2.2.9 ASSEMBLE THE PROJECT PLAN

The purpose of the project plan is to ensure that the planning project team and partners have clearly articulated and communicated their expectations for why, how, when and for how much a management planning project will be carried out. A project plan is a preliminary outline of the project and the primary tool for informing BC Parks decision makers and staff of potential issues that may arise during the process. It may also be an opportunity to highlight key issues that may have an impact on provincial protected areas policy, strategic direction or legislation.

The project plan should follow the BC Parks Project Plan Template and is typically prepared by the project lead with support from the planning project team. It is intended to be an internal document - there is no requirement to publish or engage with external parties. However, public input may be sought in developing or reviewing the project plan at the discretion of planning project team. It may also be appropriate to develop a project plan in collaboration with First Nations where a collaborative management agreement is in place. The project plan should be succinct and should not describe background details.

### Review and Approval of the Project Plan

All project plans must first be reviewed in region and in Headquarters. Followed by approval by the **Regional Director**. In collaborative management planning project scenarios involving First Nations or other partners, formal approval of the project plan generally is not required, but the planning project team may decide that formal approval would be beneficial. Review and approval of the project plan must follow all steps outlined in the BC Parks Management Plan Review and Approval Guide.

Any significant changes to important components such as budget, schedules, project scope, etc, after the project plan has been approved should be documented and clearly communicated to all project partners and the BC Parks management planning coordinator.

### Web Posting and Public Notification



Once a project plan has been approved, a planning web page for the protected area must be either created or updated to inform the public that the management planning process is underway. Public notification is an essential part of the planning process which provides visibility, legitimacy and credibility to a management planning process. At a minimum, a public notice via the RSS feed on the BC Parks website announcing the project's initiation is required. Free or low cost notification alternatives (e.g., post on the BC Parks Facebook site, post a notice in a local community center) can be effective and should be considered (see Table 7).

All review and approval steps for the web posting and public notification are outlined in detail in the Management Planning: Public Procedures Guide and the Management Planning: Web Procedures Guide.

#### **Initial Planning Checklist**

- ✓ Establish a planning project team and assign roles and responsibilities
- ✓ Gather detailed background information
- ✓ Determine the scope and complexity of the project
- ✓ Identify key management issues and opportunities and assess their importance
- ✓ Develop a First Nations engagement plan
- ✓ Develop a public engagement plan
- ✓ Develop a project budget
- ✓ Establish a project schedule
- ✓ Assemble the project plan
- ✓ Complete project partner review (approval is optional)
- ✓ Obtain review and approval of the project plan from the Regional Director

### **2.3 DRAFT MANAGEMENT PLAN PHASE**

The process of drafting a management plan builds on the work completed in the initial planning stage. The draft management plan is typically prepared by the project lead in consultation with members of the planning project team and appropriate advisors, and with input from First Nations and the public.

### **2.3.1 PREPARE THE DRAFT MANAGEMENT PLAN**

Detailed information and guidance on the format and content of the draft management plan is provided in the companion document *Guide to Writing Protected Area Management Plans*. The draft plan must be prepared using the approved BC Parks Management Plan Template, however, the complexity and level of detail contained in individual plans will vary significantly. Based on the identified management issues/opportunities and characteristics of a particular protected area, sections may be added or omitted as determined by the planning project team.

While the management plan is being drafted, portions of the management plan may be shared with members of the public or interest groups outside of the planning project team to help develop plan content. Generally speaking, the management plan in its entirety should not be released for public review until the appropriate BC Parks approvals have been obtained.

If it has not occurred already, First Nations must be consulted at this stage of the planning process. Consultation at this stage typically involves sending an initial letter indicating that a management planning process is underway with an offer to meet and discuss the project with the project lead or team. Different First Nations relationships, agreements, and commitments will dictate how this working relationship unfolds, but any consultation process must meet provincial consultation requirements.

The project lead should seek expert or peer advice regarding sensitive or controversial issues that arise during the management plan development process. It can often be helpful for the project lead to discuss these key issues with the BC Parks' planner peer group to solicit advice/ideas from other regions around the province.

In some cases, new provincial policy direction may be needed or existing direction may need to be reconsidered if an issue is expected to set a new provincial precedent. If this situation arises, the project lead should engage with headquarters planning staff to discuss the issue as early in the planning process as possible. The provincial management planning coordinator is the key contact for facilitating this dialogue.

### **2.3.2 REVIEW AND APPROVAL OF THE DRAFT MANAGEMENT PLAN**

Review and approval of the draft management plan must follow all steps outlined in the BC Parks Management Plan Review and Approval Guide.

Draft management plans should be reviewed by all members of the planning project team prior to being submitted for headquarters review. Once submitted, draft plans are reviewed by a headquarters review team, a process which is facilitated by the provincial management planning coordinator.

Once headquarters review is complete, comments are sent back to the project lead and any necessary edits to the document are made. There may be several iterations of this step, depending on the nature and complexity of the required edits. The draft management plan is then submitted to the appropriate regional director for review and approval.

If the draft management plan addresses any new controversial or high-profile issues that were not previously identified, these should be highlighted by the project lead and communicated to the provincial management planning coordinator who will determine if further action is required (e.g., notifying executive, seeking feedback from other staff, etc.).

In collaborative management planning projects such as those involving First Nations, a representative of the partner First Nation or organization must also review the draft management plan and indicate in writing that they are comfortable with its content and agree to the document being released to the public.

Prior to public release, all draft management plans must be approved by the Regional Director and the Manager, Planning and Land Administration.

### **2.3.3 RELEASE DRAFT MANAGEMENT PLAN FOR PUBLIC REVIEW**

The draft management plan will be posted on the BC Parks website along with a public comment form. The minimum requirement for public engagement is release of a public notice and a **30-day public review and comment period** for the draft management plan. The planning project team may decide that a longer review period is necessary for plans that are complex with strong public interest (i.e., 60 days or more). They may also use other approaches to gaining public input into the draft plan as outlined in the project plan.

All review and approval steps for the web posting and public notification are outlined in detail in the Management Planning: Public Procedures Guide and the Management Planning: Web Procedures Guide.

## **2.4 FINAL MANAGEMENT PLAN PHASE**

This stage of the planning process involves analysing submissions received during the public review period, subsequent editing and finalisation of the management plan, and approval of the final management plan by BC Parks decision makers and project partners.

### **2.4.1 ANALYSE PUBLIC SUBMISSIONS**

The volume and complexity of public submissions will vary among projects. Some management planning projects will be very high profile (e.g., for an area with high visitor use levels and complex management issues) while others may proceed with minimal public input.

Public input received by the team may or may not ultimately be incorporated into the management plan. Planning project teams should use their expertise and discretion in determining if and how to respond to public input. For completely new issues not previously addressed in the plan or major shifts in management direction, further consultation with regional staff, other agencies, interest groups, First Nations and others may be required. Conversely, small inaccuracies or omissions may be corrected directly by the project lead. It is important to note that opposition to management direction related to a particular use/activity may or may not result in revisions to the plan - planning project teams must consider and balance a wide range of protected area users' interests, logistical realities and regulatory or policy constraints.

A record of all public submissions must be kept on file by the regional office. Any significant changes to management direction should be carefully analysed and documented either in a separate “issues tracking” document or the Management Plan Summary.<sup>5</sup> Preparing a public report summarising feedback received by the planning project team may be appropriate for complex processes or for specific issues. If a public document is created, BC government privacy and confidentiality policies must be followed.

---

<sup>5</sup> Formerly the Information Note.

## **2.4.2 FINALISE THE MANAGEMENT PLAN**

The process of finalising the management plan is based on the analysis of submissions and any other new information that has come to the attention of the management planning team since the draft management plan was written (e.g., a change in government legislation, management commitment or policy). At this final stage, there may be special circumstances under which the management planning team may decide it is necessary to go back to the public for a second review phase. This may include circumstances where there has been a significant change in direction, role or vision since the last public review.

Although a significant time lag (i.e., 4-5 years) from the draft management plan review stage to the finalisation of the management plan may trigger interest in a second public review period, time lag alone does not necessitate further public review. In these cases, the project lead should carefully consider the ongoing relevance of the plan given current management issues, interests and protected area management policies.

## **2.4.3 FINAL REVIEW AND APPROVAL OF THE FINAL MANAGEMENT PLAN**

The appropriate Regional Director and the Executive Director, BC Parks Provincial Services Branch usually approve the final management plan. Review and approval of the final management plan must follow all steps outlined in the BC Parks Management Plan Review and Approval Guide.

In collaborative management planning projects such as those involving First Nations, the planning project team should ensure that representatives of partner organisations have reviewed the final draft plan and are comfortable with its content prior to submitting the final draft for BC Parks review and approval. The project lead should ensure that partners are aware that further changes to the final draft plan may be made during this review and approval period.

Where a management plan has been developed collaboratively, partner approval of the final management plan is required and typically sought after BC Parks approval has been obtained. Recognising the internal approval process and the commitments in the project plan, the planning project team will determine the most efficient and appropriate way to complete final partner reviews and approvals.

An event (e.g., signing/ceremony) is sometimes used to celebrate a particularly noteworthy management plan (e.g., a project that solicited significant public and

community interest or the first management plan with a particular collaborative partner). There is an expense and time commitment associated with these events, so they should not be used for every management planning process. Sometimes these are ‘open’ public events but usually are only with a select group of partners/stakeholders.

The final management plan is the most important document guiding the management of a protected area. It should be a practical, authoritative working document used by BC Parks staff and accessible to interested parties.

## **2.5 IMPLEMENTATION OF THE MANAGEMENT PLAN**

Management plan implementation is a long-term process. It involves ongoing communication of management direction through distribution of the final management plan and transferring the lead responsibility for implementation from planning staff to operational staff.

### **2.5.1 DISTRIBUTE THE PLAN**

In addition to posting a final copy of the management plan on the BC Parks website, the plan should be distributed to BC Parks operational staff and other program area staff along with direction to implement appropriate components of the plan.

All review and approval steps for the web posting and public notification are outlined in detail in the Management Planning: Public Procedures Guide and the Management Planning: Web Procedures Guide.

### **2.5.2 TRANSFER LEAD IMPLEMENTATION ROLE TO OPERATIONAL STAFF**

Once a final management plan is approved, the lead implementation role is transferred to operational staff. Planning program staff continues to provide support, as needed. It is recommended that planning staff provide a briefing to discuss and highlight key aspects of the plan including any priority strategies for implementation.

New regional staff members should receive a copy of relevant management plans as part of their orientation. These staff should also be briefed on key issues, progress that has been made towards implementing each plan, and assessment of significant obstacles to implementation.

## 2.6 MONITORING AND EVALUATION

Monitoring progress towards implementing objectives and strategies set out in a management plan is an important aspect of successful protected areas management (*did we do what we said we would do?*). At the same time, evaluation of performance should also focus on the effectiveness of these objectives and strategies (*did we achieve what we wanted to achieve?*).

In addition to monitoring whether strategies have been implemented and are effective, evaluating the ongoing relevance of a management plan within a broader strategic context is also important to ensure that it continues to be relevant and to reflect the protected areas values and management priorities of the day.

### 2.6.1 INTERNAL PLAN ASSESSMENT

Management plans guide the management, conservation and use of protected areas and therefore it is critical that plans are reviewed on a regular basis to ensure they continue to be relevant and appropriate.

An internal assessment to determine whether a management plan is still valid is required every five years (or less). The goal is to ensure that each management plan is revisited on a regular basis and does not become obsolete.

Because BC Parks reports annually to the public on the number of management plans that continue to be valid it is important that the assessment process follows a consistent process across the province. The Management Plan Internal Assessment Guide outlines a systematic approach to conducting an internal management plan assessment.

### 2.6.2 MANAGEMENT PLAN REVIEW

A formal review of the management plan (including public input and engagement) may result from the above internal plan assessment, but is more likely to be triggered by a public request or by changing conditions in the protected area. Under these circumstances, a more substantive and structured review of the plan and dialogue with regional and headquarters planning staff will be necessary to determine if a new management planning project is appropriate and feasible.

Examples of changing conditions include (but are not limited to):

- ❖ the role or purpose of the protected area changes significantly

- ❖ a severe natural disturbance event that results in significant environmental change or affects visitor services (e.g., a wildfire, landslide or wind event)
- ❖ discovery of a new value or threat to existing values that requires substantive new management direction
- ❖ new proposed visitor activities or services that are not adequately addressed in the existing management plan(e.g., motorized access, a new campground)
- ❖ results of an effectiveness evaluation that indicate a change to management objectives or strategies is needed (e.g., ongoing detrimental visitor use impacts on a critical value)
- ❖ changes to legislation, regulation or policy (e.g., a change in protected area designation, new wildlife management policies)
- ❖ significant change to adjacent land use
- ❖ new strategic land use planning direction (e.g., new Land and Resource Management Plan)