



Stewardship and Monitoring Plan Template

The following template should be used to guide the development of the Stewardship and Monitoring Plan submitted to the Willamette Partnership for a project's generating credits under the Ecosystem Credit Accounting System General Crediting Protocol Versions 1.1 and 2.0. The length of the plan and the level of detail included in the plan will vary depending on the size, complexity and duration of the restoration or conservation project that is generating credits. The Project Developer may modify the organization and content of this template, as necessary, using their discretion and including additional information where appropriate to best assist Willamette Partnership in assessing the suitability of the planned management activities.

Many projects will likely be accompanied by a conservation easement, lease, land protection agreement or other document that specifies anticipated management activities. These legal agreements associated with the project or property will likely take precedence over the Stewardship and Management Plan if conflicts arise.

TITLE PAGE

Project information is often presented on a title page; it should include the following information:

- Name of the site and project;
- Date of submittal;
- The name of the entity submitting the plan; and,
- Contact information for main entity responsible for developing and implementing long-term management activities.
- Table of contents

1 INTRODUCTION

1.1 Purpose

Describe the purpose of the Stewardship and Monitoring Plan, which should include setting out a plan for monitoring, managing and maintaining the project site for the life of the credit in a manner consistent with project management objectives and performance standards.

Modifications to the Stewardship and Monitoring Plan over time should be tracked; a table may be used to organize revisions.

REVISION NUMBER	DESCRIPTION	REQUESTED BY	IMPLEMENTED BY	COMPLETION DATE
1				
2				

1.2 Land Management Responsibilities

Clearly describe which individuals or entities are responsible for overseeing and implementing the stewardship and management activities outlined in the plan. This information can be documented in a table or in written form. All parties who have designated roles or responsibilities should review the plan and sign the final version to signify their agreement to implement the documented scope of work.

2 PROJECT OVERVIEW AND DESIRED FUTURE CONDITION

2.1 Project and Site Overview

This section should briefly describe the project site that is generating credits and where the long-term management activities will occur. The purpose of this section is to orient the reviewer to the overall project and provide sufficient context for assessing the Stewardship and Management plan. At a minimum, this section should include the following information:

- General geographic location of the project area (e.g., state, county, river basin, etc) as well as a description of the physical characteristics (e.g., type of habitat, size of project area);
- An overview of the management objective(s) for the project area as well as a brief summary of the type of restoration or conservation actions that will achieve that objective (e.g., riparian revegetation) and the desired future condition of the project area;
- Types of credits being generated from the restoration or conservation project;

This section may also include a map of the project site that identifies the conservation or restoration areas and other map elements as relevant to the proposed management activities (e.g. transects for monitoring) and a brief description of the entity or entities that are involved in the long-term management and maintenance of the site; and,

3 CONSERVATION THREATS AND MANAGEMENT LIABILITIES

3.1 Conservation Threats

Discuss the most significant long-term threats to achieving the established management objectives. The Project Developer is encouraged to consider both natural and human caused threats that may compromise project performance over the life of the credit.

3.2 Management Limitations

Describe financial, legal or social factors that may interfere with the Project Developer's ability to address threats or maintain site condition. This may include, but is not limited to, deed or easement restrictions, hunting allowances, or funding limitations.

4 MONITORING, MANAGEMENT AND MAINTENANCE

4.1 Monitoring Plan

Where the Stewardship and Monitoring Plan is a legal document, it may be preferred to include the Monitoring portion as an attachment.

4.1.1 Overall Design/Methodology

Prior to collecting any data the Project Developer should identify relevant performance standards from the ECAS, associated attributes and measures.

Attributes are defined as characteristic or inherent parts of the function that may indicate the extent to which a particular function is active. *Measures* are metrics for individual attributes that allow a qualitative or quantitative assessment of attributes independent of location. Measures are monitored to assess progress toward project objectives, evaluate overall project success and identify problems along the way that can impede the achievement of project objectives. Some credit types have specific performance standards (e.g. % cover of invasive species for riparian restoration projects), attributes and measures related to these performances standards need to be included in the monitoring plan.

Overall monitoring design may include quantitative data collection and analysis (e.g., water quality samples, species counts) as well as qualitative data collection and analysis (e.g., observation and photo points). All monitoring information should assist the project team in answering the question "how will we know that we have achieved our objectives?"

4.1.2 Data Collection and Management

Briefly describe how data will be collected in the office or in the field. Information should include:

- How plots/sampling points are determined;

- Feature(s) being measured;
- When monitoring will begin and how often they will occur
- References to standards, protocols and instructions for field instruments used in data collection that will be followed.¹
- Plan for storing and managing data so that it will be available for the life of the project and can easily be transferred to another entity in the event that monitoring and maintenance responsibilities are assumed by that entity.
- Quality Assurance/Quality Control – Measures the project team will take to ensure quality throughout the data collection and analysis processes. This may include qualifications that may be requisite for individuals collecting/analyzing data or chains of command for ensuring accountability. Project Developers should use their discretion to determine what types of quality assurance or control measures may be appropriate for measuring and tracking project progress.
- As applicable, criteria that must be achieved for regularized monitoring to discontinue.

4.1.3 Data Analysis

Specify what calculations/measurements will be used to analyze data and how this analysis relates to performance indicators. Information may include:

- What unit of measurement will be used;
- What the confidence interval and how it will be calculated;
- Any other calculations that are used to interpret data; and,
- References to standards and protocols that will be followed.

Analyses conducted will be contingent upon the data collected and the performance indicators identified by the project team.

4.2 Management Activities

Clearly outline the nature and timing of activities that are likely to affect project performance. This includes activities that will be implemented over the life of the project specifically to achieve management objectives and minimize long-term threats (e.g. control of invasive species) and any other activities that affect the integrity of the project (e.g. fertilization or irrigation regimes on or near nutrient credit projects).

Management activities and the intensity of their application will vary by project. This section can also specify any restrictions in allowable management activities (e.g. limitations on hunting). Restrictions will vary by project and are likely to be specified in an accompanying conservation easement.

¹ Project Developers are encouraged to reference other documents; the Partnership does not require reproduction of information that is recorded in a different document.

The Project Developer is also encouraged to document factors that are likely to influence site management. For instance, a restriction on the funds being used, other ongoing projects or the need to maintain coordination with other programs (e.g., maintaining Salmon-Safe certification).

4.3 Stewardship and Monitoring Reports

Stewardship and monitoring reports are submitted on a semi-regular basis for all credit types. Specify what will be submitted, to whom and on what timeline. Outline what information will be included in the stewardship reports.

5 FUNDING AND TASK PRIORITIZATION

This section should specify the anticipated total funding for implementing the management activities for the duration of the project broken down by year and by task, with the underlying assumptions of the estimate made clear. In addition, this section should describe how funding will be managed over the life of the project, with attention given to the following:

- Who is ultimately responsible for long-term funding;
- How expenses will be tracked and reported to ensure transparency and accountability; and,
- How to prioritize management activities in the event that funds are low

If the project requires an endowment for long-term management activities the Project Developer should describe how the endowment will be managed to cover the costs of management activities.

6 TRANSFER, AMENDMENTS, & NOTICES

This section should include the following information:

- How long-term land management or funding management may be transferred to other entities over the life of the project; and,
- How the Stewardship and Management Plan will be amended over time and who should be involved in those amendments.

7 SIGNATURES

Any individual or entity responsible for implementing portions of this plan must review and sign off on the plan.

8 REFERENCES

The Stewardship and Management Plan should include references to relevant publications or reports that provide rationale for undertaking certain management activities.