



# South Okanagan – Similkameen Conservation Program

## PROTOCOL/OPERATING PRINCIPLES FOR SOSCP STEWARDSHIP DELIVERY

Approved by SOSCP Steering Committee on May 15, 2003

### **Introduction**

The south Okanagan and lower Similkameen area of BC is recognized as one of Canada's most endangered ecosystems. It is home to 38 COSEWIC and 256 provincially listed species at risk and is a hot spot for species richness, rarity, resilience, and risk. The South Okanagan-Similkameen Conservation Program (SOSCP) was formed in 2000 to help elevate conservation efforts in the area. SOSCP's mandate is to preserve the rich biodiversity of this area, including species at risk and the connectivity between the expansive grasslands extending to California in the south and to the Chilcotin in the north. There are currently 32 government and non-government partner organizations in SOSCP.

Private land stewardship is the voluntary conservation of natural features including wildlife and fish habitat by landholders of private property and other concerned citizens.<sup>1</sup> Stewardship is one of the key components of SOSCP and is fundamental to its success. Stewardship is a cost-effective alternative to land acquisition and a stepping stone to higher levels of securement such as covenants, donations and fee simple acquisitions.

Since the inception of SOSCP, a number of groups are now involved in the delivery of stewardship and landowner contact projects. Stewardship activities have increased exponentially and there are now more opportunities with increased attention and funding to raise awareness of key conservation issues. This increased focus on stewardship delivery is welcomed. However it has created some difficulties. With the escalation of landowner contact has come some confusion on the part of landowners both in terms of multiple contacts delivering different stewardship messages and of understanding who is who. In at least one case a long-standing land steward no longer wants to participate in any conservation activities. In view of the overriding principle behind effective stewardship, which is to put the landowner's wishes first, there are some key operating principles needed to both maximize limited resources and deliver a cohesive and well-coordinated stewardship delivery program on behalf of SOSCP. Some suggestions for doing so are outlined below.

### **Stewardship- a historical perspective**

Private land stewardship officially began in the south Okanagan and lower Similkameen valleys with the inception of the South Okanagan-Similkameen (SOS) Stewardship Program in 1994 under the umbrella of the South Okanagan Conservation Strategy (SOSCS). It was supported in the first few years by The Nature Trust of BC, Habitat Conservation Trust Fund and the then Ministry of Environment. In those early days a landowner contact program revolved around property owners of large holdings having a total of 11,000 ha. Many of these landowners were

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<sup>1</sup> Landowner Contact Guide for BC, *Stewardship Series*, 1997, Ministry of Environment, Lands & Parks, pg 3.

ranchers. Their properties were selected on the basis of a number of criteria such as important habitat, location in relation to other important habitat and existing conservation holdings, etc. Since these early days SOS Stewardship has grown to encompass other landowners and geographic areas of significance to specific habitat and species such as Antelope-brush plant community and California Bighorn Sheep. A number of significant products have been developed to support stewardship delivery. The Program has been well-supported over the years and was this year's Minister of Land, Air and Water Protection's Award for Excellence in Stewardship.

### ***A Need for a Collaborative Stewardship Approach***

In recent years SOS Stewardship and The Land Conservancy (TLC) of BC have partnered on a number of initiatives. With the emergence of SOS SCP, TLC, as both Chair of the Stewardship arm of SOS SCP and administrator of the SOS Stewardship Program, is responsible for the coordination of all SOS SCP stewardship projects. In cooperation with SOS Stewardship, TLC has implemented a comprehensive landowner contact and stewardship database. This database is a fundamental tool in tracking landowner contact and stewardship with individual landowners and specific properties. This comprehensive record-keeping device is critical to effective and efficient stewardship delivery, and to strategic planning of all future stewardship initiatives. However it is only as valuable as the data entered. By using this tool we can streamline stewardship delivery, help prevent duplication of landowner contact and build cooperation amongst the various projects. Also other measures besides the database are imperative to a well-orchestrated SOS SCP Stewardship arm.

One other critical measure is having a consistent protocol or set of operating principles for conducting landowner contact. This runs the gambit of landowner contact training to networking with other landowner contact projects. This document outlines a set of operating principles/protocols that have been approved by the SOS SCP Steering Committee. All projects and initiatives within the SOS SCP area involving contact with landowners or the delivery of stewardship are required to follow these principles/protocols. Please review these principles/protocols and contact Shawn Black, Stewardship Coordinator, if you have any questions or comments. In the spirit of effective and cooperative SOS SCP stewardship delivery and landowner contact we look forward to working with you.

### ***Protocol/Operating Principles for SOS SCP Stewardship Delivery and Landowner Contact***

At the Stewardship 94 conference, Stewart Hilts from the University of Guelph stated the following:

*"In developing landowner contact programs, the place to start with is the view of the landowner. Landowners have their own interests, but are usually interested in being informed about programs that may impact them. They are usually very knowledgeable, but also have an almost limitless thirst for further knowledge.*

*Six principles for landowner contact may help:*

- 1. Have complete respect for the landowners.*
- 2. Be willing to listen.*
- 3. Have patience.*
- 4. Provide ecological information.*
- 5. Build community support.*
- 6. Build a long-term relationship of trust with landowners."*

This message and principles apply to the work we are doing under SOSCP. The following protocol/operating principles have been based on this and expanded to capture the specific of our operating climate.

### ***Ethics of Stewardship (How you behave)***

1. *Respect Landowners*
  - Maintain respect for landowner opinions and interests. Without respect it will be difficult to establish trust in your relationship with the landowner.
2. *Be Patient and Listen*
  - Find out what the landowner knows about their land, and what interests them the most. Don't expect immediate results.
3. *Provide Information*
  - This is the main purpose of landowner contact and stewardship delivery. Try and provide the landowner with information that matches their interests, avoid giving them too much information.
4. *Build Community Support*
  - Private land stewardship needs community support in order to succeed. Portray private land stewardship as an important community contribution through recognition of landowner accomplishments, publicity, demonstration projects, and public involvement.
5. *Maintain Trust and Credibility*
  - Build a good reputation and trust. Keep your promises. Word of mouth communications between landowners and neighbours can help your project to succeed or cause it to fail.
  - Credibility with landowners, local businesses, funders, and politicians is essential. If you lose your credibility it may be impossible to regain it.

### ***Communication, Collaboration & Cooperation***

1. *Communicate with SOSCP*
  - Be sure to maintain communications with the SOSCP Stewardship Coordinator, who has a sense of the "big picture" and can help you.
  - Participate in the SOSCP Stewardship Steering Committee/Team.
  - Do your best to integrate and be consistent with SOSCP planning (SOSCP Strategic Plan and prospectus, SOSCP Science, Stewardship, Land Use, Outreach, and Traditional Ecological Knowledge team planning).
2. *Other Projects*
  - Find out if there are other projects (past and present) that have targeted or are targeting similar habitats, species, and/or issues to your project. The SOSCP Stewardship Coordinator can help you do this.
  - Identify areas of overlap (in message and geographic terms) with other projects.
3. *Cooperate on the delivery of Stewardship*
  - Work with other stewardship projects to share in the delivery of landowner contact, information, materials, etc.
  - Other stewardship projects may have already contacted some or all of the landowners you are interested in talking to. Ask them to help you, either by introducing you to the landowners, or by delivering your informational materials and directing interested landowners to your project. Also, if you are familiar with the other projects, landowners will know that the activities are coordinated and are likely to be more receptive.
4. *Landowner Contact expertise*
  - Utilize local landowner contact experts. Initiatives like SOS Stewardship have expertise in landowner contact; they can help you deliver your message.

## 5. Record Keeping

- Maintain good records of your project, particularly your contact with landowners. At a minimum, you need to collect a basic set of information on each landowner and property you visit.
- Use the comprehensive landowner contact and stewardship database, developed by The Land Conservancy, as Chair of the SOSCP Stewardship Team. This CONFIDENTIAL database is a central registry for all landowner contact and stewardship initiatives within the SOSCP area. TLC will provide you with a list of basic and advanced information that should be collected for entry into the database. Respect the confidentiality of the information. There are only two conditions for use of the database.
  - a) You sign a Confidentiality Agreement with TLC (stating that you will keep this information confidential).
  - b) You provide data/records for input into the database.

## Qualifications and training

- Contact personnel act as the primary liaison between landowners and your project. Choosing the right person is essential. Not only do they represent your project, they also set the tone for all future cooperative activities with landowners and other groups.<sup>2</sup> Not everyone is suited to this kind of work. The following is a list of important qualifications for a landowner contact person:
  1. Attitude & Personality
    - A respectful attitude, the key to success.
    - A friendly approach, positive disposition and endless patience.
  2. Skills & Education
    - General knowledge of natural science, land management and other related fields.
    - A general understanding of the stewardship options available to landowners (such as conservation covenants, ecological gift donations, etc.).
    - The ability to communicate clearly and effectively (so that the landowner knows what you are talking about).
  3. Local Knowledge
    - Good understanding of local issues and concerns.
    - Good knowledge of the local ecosystem, habitats, and species.
    - Good knowledge of the local geography and communities.
  4. Training Resources
    - Resources are available for training in landowner contact (via SOS Stewardship).
    - Resources are available for training in habitat stewardship options and securement (via TLC)

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<sup>2</sup> Landowner Contact Guide for BC, *Stewardship Series*, 1997, Ministry of Environment, Lands & Parks, pg 21.