***CDFW developed this general outline to assist in the development of the Start-up, Interim and Long-term Management Plans for conservation areas. Objectives and tasks are provided for illustrative purposes only and may not represent management requirements for a specific project. This document should not be interpreted as an order or mandatory standard.***

*Text in brackets and highlighted in gray should be edited to fit each specific situation. Bracketed, highlighted text that is italicized includes instructions for completing these sections. This document has additional instructions in comment form. Please ensure document is being viewed in a format that shows the comments.*

(Template Version Date: December 2024)

# Start-up, Interim, and Long-term Management Plan For [*Insert Name*] [Preserve, Conservation, or Easement Area]

Prepared for: [*Edit information and spacing as necessary*]

Prepared by: [*Edit information and spacing as necessary*]

Date: [*Leave blank. CDFW will insert effective date here when signed.*]

Table of Contents

[Start-up, Interim, and Long-term Management Plan For [*Insert Name*] [Preserve, Conservation, or Easement Area] 1](#_Toc184656047)

[I. Acronym Definitions 4](#_Toc184656048)

[II. Introduction 4](#_Toc184656049)

[Purpose of Mitigation Land 4](#_Toc184656050)

[Purpose of this Start-up, Interim, and Long-term Management Plan 4](#_Toc184656051)

[Landowner and Responsibilities 5](#_Toc184656052)

[Land Manager and Responsibilities 5](#_Toc184656053)

[Conservation Easement Grantee and Responsibilities 6](#_Toc184656054)

[Funding Responsibilities 7](#_Toc184656055)

[Endowment Manager(s) and Responsibilities 9](#_Toc184656056)

[III. Property Description 10](#_Toc184656057)

[Setting and Location 10](#_Toc184656058)

[Access 10](#_Toc184656059)

[Historical and Current Land Use 11](#_Toc184656060)

[Cultural Resources – (if applicable) 11](#_Toc184656061)

[Hydrology and Topography 11](#_Toc184656062)

[Soils 11](#_Toc184656063)

[Existing Easements – (if applicable) 11](#_Toc184656064)

[Current Adjacent Land Uses 12](#_Toc184656065)

[IV. Biological Resources 12](#_Toc184656066)

[Habitat Types, Vegetation Communities, Floral Resources, and Common Species 12](#_Toc184656067)

[Endangered, Threatened, Candidate, Fully Protected, and Rare Species 12](#_Toc184656068)

[Other Rare Species and Species of Special Concern 13](#_Toc184656069)

[V. Start-up Activities, Habitat Enhancement or Restoration 13](#_Toc184656070)

[VI. Interim and Long-Term Management 13](#_Toc184656071)

[Interim and Long-Term Management 13](#_Toc184656072)

[Element A.1. Vegetation Management *(if applicable)* 15](#_Toc184656073)

[Element A.2 Endangered, Threatened, Candidate, and Rare Plant Species Monitoring *(if applicable)* 16](#_Toc184656074)

[Element A.3Endangered, Threatened, Candidate, and Fully Protected Animal Species Monitoring (*if applicable*) 17](#_Toc184656075)

[Element A.4 Non-native Invasive Plant Species 18](#_Toc184656076)

[Element A.5 Non-Native Wildlife Detection and Control 20](#_Toc184656077)

[Element A.6 Waters of the U.S., Including Wetlands (*if applicable*) 21](#_Toc184656078)

[Element A.7 Sedimentation & Erosion (*add Offsite Stormwater Control if applicable*) [*Element optional- remove if not applicable*] 22](#_Toc184656079)

[[Element A.8 Lake or Streambed Alteration Agreement (*Remove if no Lake or Streambed Alteration agreement for the Preserve/Conservation/Easement Area*) 23](#_Toc184656080)

[Security, Safety, and Public Access 23](#_Toc184656081)

[Element B.1 Trash and trespass 24](#_Toc184656082)

[Element B.2 Fire Hazard Reduction 25](#_Toc184656083)

[Element B.3 Mosquito Abatement Management 26](#_Toc184656084)

[Element B.4 Fencing, Gates, Locks, and Signs 27](#_Toc184656085)

[Reporting and Administration 29](#_Toc184656086)

[Element C.1 Annual Report 29](#_Toc184656087)

[Adaptive Management 30](#_Toc184656088)

[VII. Transfer, Replacement, Amendments, and Notices 31](#_Toc184656089)

[Transfer 31](#_Toc184656090)

[Replacement 32](#_Toc184656091)

[Amendments 32](#_Toc184656092)

[Notices 33](#_Toc184656093)

[VIII. Funding and Task Prioritization 35](#_Toc184656094)

[Funding 35](#_Toc184656095)

[Task Prioritization 35](#_Toc184656096)

## Acronym Definitions

[*Add or remove terms as necessary*]

BO Biological Opinion

CDFW California Department of Fish and Wildlife

CE Conservation Easement

ITP Incidental Take Permit

LSA Lake or Streambed Alteration

NMFS National Marine Fisheries Service

RWQCB Regional Water Quality Control Board

USFWS United States Fish and Wildlife Service

## Introduction

### Purpose of Mitigation Land

The [*insert name of conservation area*] ([Preserve, Conservation Area, or Easement Area]) was established to compensate for impacts to, and to conserve and to protect [*insert as applicable:* Common name of covered species (*Scientific Name*) and covered habitat; wetlands, riparian habitat, and special status species habitat; Fish and Wildlife resources subject to section 1600 of California Fish and Game Code], pursuant to [*insert applicable permit names and numbers and define collectively as* [Permits]*, and associated agencies requiring the mitigation land. Define relevant agencies by acronym or abbreviation and collectively as* Resources Agencies]. The [Preserve, Conservation Area, or Easement Area] is protected by a [conservation easement (CE), durability agreement, other instrument] and includes \_\_\_\_\_ acres of [*specify habitat or species type, etc. May include this information as a table*]. In the event of a conflict between this start-up, interim, and long-term management plan (Management Plan) and either the Permits or the CE, the terms of the Permits or CE shall control over the terms of the Management Plan.

### Purpose of this Start-up, Interim, and Long-term Management Plan

The purpose of this Management Plan is to ensure the [Preserve, Conservation Area, or Easement Area] is monitored, managed, and maintained in perpetuity for the benefit of the [*insert covered species and/or habitat type*]. All other land uses shall be secondary to the above-stated purpose. This Management Plan establishes objectives and tasks to monitor, manage, maintain, and report on the status of the [Preserve, Conservation Area, or Easement Area]. This Management Plan is designed to implement the [conservation easement (CE), durability agreement, other instrument] covering the [Preserve, Conservation Area, or Easement Area].

### Landowner and Responsibilities

The landowner (Landowner) is [*insert Landowner name*]. The Landowner, and any subsequent Landowner should land ownership transfer occur, is ultimately responsible for ensuring the conservation values are maintained as described in the CE and for implementing management and monitoring of the [Preserve, Conservation Area, or Easement Area] according to this Management Plan including responsibilities delegated to a third party. The Landowner shall be obligated to manage and monitor the [Preserve, Conservation Area, or Easement Area] in perpetuity to preserve its habitat and conservation values in accordance with the CE and this Management Plan.

Any alteration of the [Preserve, Conservation Area, or Easement Area]’s topography or hydrology by the Landowner or its representatives must comply with the CE and the Landowner must obtain any necessary permits or authorizations, such as a California Endangered Species Act (CESA) incidental take permit (ITP), memorandum of agreement (MOU), lake or streambed alteration (LSA) agreement, Clean Water Act Section 404 permit, grading permit, or conditional use permit for such alterations, if required.

The Landowner’s contact information is:

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Representative\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [*include if Landowner is a business/agency/entity*]

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone number\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Land Manager and Responsibilities

The Landowner may delegate land management responsibilities to a third-party land manager (Land Manager). The Land Manager is [*insert Land Manager name*]. The Land Manager, and any subsequent Land Manager upon transfer, is responsible for ensuring that biological resources within the [Preserve, Conservation Area, or Easement Area] are protected and maintained in perpetuity and that the specific tasks outlined in the Management Plan are completed. The land manager shall be approved in advance, in writing by the California Department of Fish and Wildlife (CDFW) in accordance with Government Code section 65967, subdivision (c). Any proposed changes in the third-party land manager shall also be approved in advance, in writing by CDFW. The Land Manager is responsible for hiring a biologist to monitor the [Preserve, Conservation Area, or Easement Area] (Monitoring Biologist). The Monitoring Biologist will be a professional botanist, biologist, or restoration ecologist familiar with California flora and fauna, and will have a working knowledge regarding rivers, streams, lakes, wetlands and their resources. The Monitoring Biologist must also have working knowledge regarding the [*insert Covered Species or other resource and the tasks outlined in this Management Plan*].

The Land Manager shall be responsible for providing an annual report to the Resources Agencies and the entity that holds the CE (CE Grantee) detailing the time period covered, an itemized account of the management tasks, and total amount expended.

The Land Manager’s contact information is:

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Representative\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [*include if land manager is a business/agency/entity*]

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone number\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Conservation Easement Grantee and Responsibilities

To protect against land use changes other than for conservation purposes, a [Resources Agencies- or CDFW-] approved CE will be placed on the \_\_\_\_-acre [Preserve, Conservation Area, or Easement Area] to ensure that the [Preserve, Conservation Area, or Easement Area] will be retained forever in its natural, restored, or enhanced conditions, and to prevent any use of the [Preserve, Conservation Area, or Easement Area] that would impair or interfere with the conservation values of the [Preserve, Conservation Area, or Easement Area]. The CE Grantee is [*insert name of CE grantee*]. The CE Grantee must be approved by CDFW and must meet the requirements of Civil Code section 815.3 and Government Code sections 65966 and 65967.

The [*fill in, e.g*., USFWS, CDFW and RWQCB] is/are third-party beneficiaries of the CE. These third-party beneficiaries all have the right of access to the [Preserve, Conservation Area, or Easement Area] and the right to enforce all of the obligations of the Landowner and CE Grantee.

The responsibilities of the CE Grantee are described in the CE and include preserving and protecting the conservation values of the [Preserve, Conservation Area, or Easement Area], preventing any activity that is inconsistent with the purposes of the CE, performing annual compliance monitoring inspections of the [Preserve, Conservation Area, or Easement Area] to ensure compliance with this Management Plan, and preparing reports on the results of the compliance monitoring inspections and providing these reports to the Land Manager, Landowner, and Resources Agencies on an annual basis.

The CE Grantee’s contact information is:

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone number\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Funding Responsibilities

Start-up Activities and Interim Management Funding

Pursuant to the Permits, [*insert permittee name*] (Permittee) is responsible for providing funding to implement start up activities and interim management tasks outlined in this Management Plan. The funding required for start-up activities and interim management of the [Preserve, Conservation Area, or Easement Area] is determined by a cost estimate of the tasks required to occur during start-up activities and/or interim management tasks required before the endowment may be accessed. An analysis (Endowment Assessment) was prepared for this Management Plan (Attachment 3) to identify the costs of all tasks required by this Management Plan. [Sections XX/ The sections labeled \_\_\_\_\_\_\_\_] of the Endowment Assessment detail the approximate costs of start-up activities and/or interim management tasks. The Permittee is responsible for ensuring that the funding for start-up activities and interim management of the [Preserve, Conservation Area, or Easement Area] is accessible to the Land Manager and CE Grantee for use as described in this Management Plan.

Long-term Management Funding

Pursuant to the Permits, the Permittee is required to provide long-term management funding (Endowment Fund) for the in-perpetuity management of the [Preserve, Conservation Area, or Easement Area]. The Endowment Fund is an income-bearing account in an amount sufficient to earn enough annual income to fund the ongoing management of the [Preserve, Conservation Area, or Easement Area]. Since only the income is available for use and the principal is not typically withdrawn, the Endowment Fund provides a perpetual source of funding for management activities. Distribution of the management funds from the Endowment Fund will be based on management activities performed annually. [Sections XX/ The sections labeled \_\_\_\_\_\_\_\_] of the Endowment Assessment detail the approximate costs of long-term management tasks.

Conservation Easement Monitoring Funding

The Permittee should provide funding for monitoring compliance with the CE and Management Plan of the [Preserve, Conservation Area, or Easement Area] (CE Monitoring Endowment Fund). The CE Monitoring Endowment Fund is also an income-bearing account in an amount sufficient to earn enough annual income to fund the ongoing monitoring of compliance with the CE and Management Plan of the [Preserve, Conservation Area, or Easement Area]. Since only the income is available for use and the principal is not typically withdrawn, the CE Monitoring Endowment Fund provides a perpetual source of funding for monitoring. Distribution of the monitoring funds from the CE Monitoring Endowment Fund will be based on monitoring activities performed annually. [Sections XX/ The sections labeled \_\_\_] of the Endowment Assessment detail the approximate costs of monitoring the [Preserve, Conservation Area, or Easement Area].

### Endowment Manager(s) and Responsibilities

Endowment Manager

The entity that holds the Endowment Fund (Endowment Manager) is [*insert name*]. The Endowment Manager shall be responsible for holding, managing, investing, and disbursing the Endowment Fund in furtherance of the long-term stewardship of the [Preserve, Conservation Area, or Easement Area] and in compliance with the terms of the Permits, Government Code sections 65965-65968, and Probate Code sections 18501-18510. The Endowment Manager shall be approved in advance, in writing by CDFW and shall meet the requirements of Government Code section 65968(d).

The Endowment Manager’s contact information:

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone number\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CE Monitoring Endowment Manager

The entity that holds the CE Monitoring Endowment Fund (CE Monitoring Endowment Manager) is [*insert name*]. The CE Monitoring Endowment Manager shall be responsible for holding, managing, investing, and disbursing the CE Monitoring Endowment Fund in furtherance of the long-term monitoring of the [Preserve, Conservation Area, or Easement Area]. The CE Monitoring Endowment Manager shall meet the requirements of Government Code section 65968(d).

The CE Monitoring Endowment Manager’s contact information:

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone number\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Property Description

### Setting and Location

The [Preserve, Conservation, or Easement Area] is located at [*include address if available or distance from nearest cross streets and county*], State of California, on Assessor’s Parcel No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. The [Preserve, Conservation Area, or Easement Area] encompasses \_\_\_\_ acres and is located at [*describe project location*]. Exhibit [X] to the CE contains a legal description of the [Preserve, Conservation Area, or Easement Area]. The [Preserve, Conservation Area, or Easement Area] is shown on the general vicinity map (Figure 1) and the [Preserve, Conservation Area, or Easement Area] property map (Figure 2). The general vicinity map shows the [Preserve, Conservation Area, or Easement Area] location in relation to cities, towns, or major roads, and other distinguishable landmarks [on an aerial-based map]. The property map shows the [Preserve, Conservation Area, or Easement Area] property boundaries on a topographic map.

### Access

[*Describe the legal access to the property and Conservation Area from a public right of way. If the property, CE, or portions of the* *Preserve/Conservation/Easement Area, are not accessible from a public right of way, show record references for access rights legally sufficient to provide CE Grantee and third-party beneficiaries’ access. Include any access procedures to be followed by visitors (advance notice, contact information, access location). May be shown on a separate exhibit and does not have to be survey grade.*]

### Historical and Current Land Use

[*Briefly describe past and present land use such as grazing practices, herbicide control, access roads, firebreaks and suppression, drill pads for mining, historical structures (e.g., cattle enclosures), etc. Describe land use of any areas on the property not included in the Preserve/Conservation/Easement Area.*]

### Cultural Resources – (if applicable)

[*Briefly describe any structures that are likely to be considered "historical resources" of the state pursuant to Executive Order W-26-92 and historic resources preservation laws.*]

[*Describe any known archeological sites without providing their specific locations on the property and include a summary of the results of any site surveys/inventories, including who conducted them. An assessment of the impacts of management should be given for such sites*.]

### Hydrology and Topography

[*Briefly describe hydrology and topography of site. Indicate the watershed where the Preserve/Conservation/Easement Area is located and include a description of water resources on the property such as streams, ponds, springs, wetlands, floodplains, etc. If applicable, provide map showing their location. Clarify if the water source is natural or will be supplemented with artificial sources (e.g., wells, purchased water). Indicate whether wetlands are driven by surface flows (i.e., fluvial systems) or groundwater flows from offsite sources. Describe how water flows onto and off the site during and after storm events.*]

### Soils

[*Briefly describe soils on the Preserve/Conservation/Easement Area including a description of types of soil (sand, silt, clay, etc.); whether and what types of aggregates are present and in what size and general color; and whether and what types of organics are present*.]

### Existing Easements – (if applicable)

[*Include descriptions/locations of existing easements, their nature (buried pipeline, overhead power, ingress/egress, etc.), authorized users (if known), access procedures, etc. Attach the BIE map as outlined in the Permittee Checklist for HM Lands Packages. Depict easements, rights of way, ingress, and egress routes on the BIE map. Provide a table that includes each easement and its acreage. The HM Land Title information sheet from the Permittee HM Lands Checklist may be included here.*

*If applicable, include a description of any easements that have been subordinated and include any subordination agreements or quitclaims as attachments*]

### Current Adjacent Land Uses

[*Briefly describe current adjacent land uses. These land uses may change over time; however, the description of the baseline conditions will give the manager some idea of the conditions present when the Management Plan was first developed. Also, describing adjacent land uses may bring to light areas that may be of management concern or items that may compromise biological integrity over time.*]

## Biological Resources

[*This section should summarize the biological report that was part of the land package.*]

### Habitat Types, Vegetation Communities, Floral Resources, and Common Species

[*Describe the baseline biological conditions including habitat types, vegetation communities (assessment of native vs. exotic species), and floral resources. In addition, provide an inventory list, if available, of common plant and animal species which are known or likely to occur on the property*. *Include the mitigation habitat types impacted by the project covered under the Lake or Streambed Alteration Agreement, CWA section 404, 401, etc., if applicable.*]

### Endangered, Threatened, Candidate, Fully Protected, and Rare Species

[*Describe all species listed as endangered or threatened pursuant to CESA, species that are candidates for listing pursuant to CESA, plant species listed as rare under the Native Plant Protection Act, or fully protected species that occur or may occur on the Preserve/Conservation/Easement and species presence based on the results of protocol surveys. Describe habitat requirements of each species and a quality assessment of all habitat types (i.e., life history requirements of covered species met, habitat diversity, connectivity to other habitats and protected areas). If applicable, provide a map showing their location. Species listed under the ESA but not CESA will usually be covered under section IV(C) below but may be included in this paragraph in some cases.*]

### Other Rare Species and Species of Special Concern

[*Description of* [*California Rare Plant Rank*](https://www.cnps.org/rare-plants/california-rare-plant-ranks.) *species and* [*Species of Special Concern*](https://wildlife.ca.gov/Conservation/SSC) *that occur or may occur on the Preserve/Conservation/Easement site and species presence based on the results of protocol surveys. Describe habitat requirements of each species and a quality assessment of those habitat types in relation to the species (i.e., whether habitat diversity and connectivity to other habitats and protected areas meet life history requirements of the species). If applicable, provide map showing their location.*]

## Start-up Activities, Habitat Enhancement or Restoration

[*Briefly describe objectives for preparing the Preserve/Conservation/Easement Area for conservation. Start-up activities can include initial fencing, litter removal, habitat creation and enhancement, or restoration activities, etc*. *Include detailed description of any habitat enhancement or restoration activities including maps and figures as applicable*.]

## Interim and Long-Term Management

Interim and long-term management tasks, including monitoring, are intended to ensure the viability of the [Preserve, Conservation Area, or Easement Area]’s [*fill in the target resources being conserved*] in perpetuity. The elements described below outline the interim and long-term Management Plan for the [Preserve, Conservation Area, or Easement Area].

### Interim and Long-Term Management

The approach to the interim and long-term management of the [Preserve, Conservation Area, or Easement Area]’s biological resources is to conduct monitoring and adaptive management of selected characteristics to determine stability and ongoing trends of [*list covered species and covered habitats*] and to determine that success criteria are being met and conservation values are being maintained, in perpetuity. Monitoring will assess the [Preserve, Conservation Area, or Easement Area]’s condition including, but not limited to, [covered species population status, degree of erosion, invasion of exotic or deleterious (e.g., thatch producing) species, geomorphic conditions, water quality, water surface elevations, fire hazard, grazing regime] and/or other aspects that may warrant management actions. Adaptive management means an approach to natural resource management which incorporates changes to management practices to meet goals and success criteria or maintain conservation values. Adaptive Management is discussed further in section D below.

[*The list that follows is not meant to be exhaustive. Some sites may have more elements to consider and some may have fewer*.]

Interim Management Activities:

*[Briefly describe the objectives for the interim management activities including the length of time of interim management, from the date the CE is recorded and often a minimum of three years after full funding of the endowment and success criteria are met (as applicable). This includes activities such as fence repair, continuing trash removal, biological surveys, site monitoring, and vegetation and invasive species management.* *Typically, monitoring should happen yearly or as often as needed to determine the status of a resource; however, it should not negatively impact the habitat****.****The long-term management period shall not begin until CDFW concurs that the success criteria of the interim management period have been met.]*

Long-term Management Activities:

[*Briefly describe the objectives for the long-term management activities including the expected start date/year, and monitoring activities. The long-term management period starts at the* *completion of the interim management period and continues in perpetuity*.]

The interim and long-term management activities are all the managementand monitoring activities identified in this section to preserve the conservation valuesin accordance with this Management Plan.

The Land Manager for the [Preserve, Conservation Area, or Easement Area] site shall implement the following:

[*Add or remove tasks or elements as necessary*. *Objectives and tasks should be specific and measurable.* *Tasks should be ordered so that the first task in each section is a monitoring task and subsequent tasks should be management actions to be implemented in response to the results of the monitoring task, e.g., “If monitoring task A.1-1 results in [define possible monitoring result], then [define management action to respond to that specific monitoring result].” The tasks included in this Management Plan provide the basis of the Endowment Assessment and the Endowment Assessment must be attached to the final Management Plan, so it is recommended that CDFW staff and Management Plan preparer agree on the tasks before the Endowment Assessment is developed.*]

Element A.1. Vegetation Management *(if applicable)*

**Objective**: *[Define the objectives in relation to vegetation management. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task.]*

**Task A.1-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task A.1-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Element A.2 Endangered, Threatened, Candidate, and Rare Plant Species Monitoring *(if applicable)*

**Objective**: [*Define the objectives in relation to threatened or endangered plant species. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task.*

*Note: Species-specific objectives and tasks will need to be developed in consultation with the appropriate Resources Agencies*.]

**Task A.2-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task A.2-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Element A.3Endangered, Threatened, Candidate, and Fully Protected Animal Species Monitoring (*if applicable*)

**Objective**: [*Define the objectives in relation to threatened or endangered animal species. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task.*

*Note: Species-specific objectives and tasks will need to be developed in consultation with the appropriate Resources Agencies.*]

**Task A.3-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task A.3-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Element A.4 Non-native Invasive Plant Species

**Objective**: [*Define the objectives in relation to non-native invasive plant species. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task.*

*Note: Species-specific objectives and tasks will need to be developed in consultation with the appropriate Resources Agencies.*]

**Task A.4-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task A.4-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Element A.5 Non-Native Wildlife Detection and Control

**Objective**: [*Define the objectives in relation to non-native invasive wildlife species. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task.*

*Note: Species-specific objectives and tasks will need to be developed in consultation with the appropriate Resources Agencies*.]

**Task A.5-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task A.5-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Element A.6 Waters of the U.S., Including Wetlands (*if applicable*)

**Objective**: [*Define the objectives in relation to Waters of the U.S. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task*.]

**Task A.6-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task A.6-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Element A.7 Sedimentation & Erosion (*add Offsite Stormwater Control if applicable*) [*Element optional- remove if not applicable*]

**Objective**: [*Define the objectives in relation to sedimentation and erosion, (and offsite stormwater control). List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task*.]

**Task A.7-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

[Element A.8 Lake or Streambed Alteration Agreement (*Remove if no Lake or Streambed Alteration agreement for the Preserve/Conservation/Easement Area*)

**Objective**: [*Include land management tasks from measures in the Lake or Streambed Alteration Agreement that will be implemented by Land Managers. If taken directly from a Lake and Streambed Alteration Agreement, remove “permittee shall” type language and ensure measure is rewritten to only include tasks relevant to the land manager. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task*.]

**Task A.8-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:]

### Security, Safety, and Public Access

The [Preserve, Conservation Area, or Easement Area] will be fenced with wildlife friendly fencing in a method that ensures fencing does not impact wildlife habitat linkages nor cause a barrier to wildlife movement. The top opening will be capped or the three holes on the top of any u-channel posts, signs, or vertical poles installed temporarily or permanently will be filled (e.g., with a bolt and nut) to prevent the entrapment of wildlife, especially birds of prey.

The [Preserve, Conservation Area, or Easement Area] shall have no general public access, nor any regular public or private use unless specified in the CE. Research and/or other educational programs or efforts may be allowed on the [Preserve, Conservation Area, or Easement Area] as deemed appropriate by the Resources Agencies in writing but are not specifically funded or a part of this Management Plan.

Potential mosquito abatement issues will be addressed through the development of a plan by the Land Manager and the mosquito and vector control district.

Potential wildfire fuels may be reduced as needed by [mowing, weed whacking, hand tools, grazing, etc., as appropriate], but disked fire breaks are not permitted.

Element B.1 Trash and trespass

**Objective**: [*Define the objectives of trash and trespass prevention for protecting conservation values. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task*.]

**Task B.1-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task B.1-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance

Objectives:

Element B.2 Fire Hazard Reduction

**Objective:** [*Define the objectives of fire hazard reduction for protecting conservation values. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task*.]

**Task B.2-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task B.2-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Element B.3 Mosquito Abatement Management

**Objective:** [*Define the objectives of mosquito abatement for protecting conservation values. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task*.]

**Task B.3-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task B.3-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Element B.4 Fencing, Gates, Locks, and Signs

**Objective:** [*Define the objectives of fencing, gates, locks, and signs for protecting conservation values. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task*.]

**Task B.4-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task B.4-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

### Reporting and Administration

Element C.1 Annual Report

**Objective:** [*Define the objectives of Annual Reports. List as many objectives as are relevant, and tasks that will help achieve the objectives. For each task, identify the frequency at which the task will occur and entity responsible for the task.*]

**Task C.1-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task C.1-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

### Adaptive Management

Adaptive management may be required if goals or success criteria are not being met or conservation values are not being maintained. Adaptive management may include activities necessary to address the effects of climate change, fire, flood, or other natural events, force majeure, etc.

The following is a list of minor adaptive management activities that may be implemented if the Land Manager determines they are necessary. This list is not exhaustive and other adaptive management strategies may be implemented through an amendment to this Management Plan as outlined in Section X.

[*Describe possible minor adaptive management tasks that may be required during the interim management period and long-term management period, such as short-term (one growing season) modification to prescribed grazing management stocking rates. Where applicable, reference task or element sections that may result in the need for each adaptive management activity. Frequency or other elements of adaptive management tasks may not be known in advance. Edit as required to clearly describe each activity to the maximum extent practicable.*]

**Task D.1-1 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

**Task D.1-2 [*Task name here*]**

[*Include task description here*]

Interim Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

Long-term Management

Frequency:

Responsible Entity:

Goals/Success criteria/Performance Objectives:

## Transfer, Replacement, Amendments, and Notices

### Transfer

Any subsequent transfer of responsibilities under this Management Plan to a different Land Manager shall be requested by the [Landowner/Land Manager] in writing to the Resources Agencies, shall require advance written approval by the Resources Agencies, and shall be incorporated into this Management Plan by written amendment. Any subsequent Landowner assumes responsibilities described in this Management Plan and as required in the CE, unless otherwise amended in writing by the Resources Agencies.

### Replacement

If the [Landowner/Land Manager] fails to implement the tasks described in this Management Plan and is notified of such failure in writing by any of the Resources Agencies, the [Landowner/Land Manager] shall have 90 days to cure such failure. If failure is not cured within 90 days, the [Landowner/Land Manager] may request a meeting with the Resources Agencies to resolve the failure. Such meeting shall occur within 30 days or a longer period if approved by the Resources Agencies. Based on the outcome of the meeting, or if no meeting is requested, the Resources Agencies may require a replacement Land Manager. If the [Landowner/Land Manager] fails to designate a replacement Land Manager, then such public or private land or resource management organization approved and as directed by the Resources Agencies may enter onto the [Preserve, Conservation Area, or Easement Area] property in order to fulfill the purposes of this Management Plan.

If the CE Grantee determines that immediate action is required to maintain the conservation values of the [Preserve, Conservation Area, or Easement Area], the CE Grantee may require the [Landowner/Land Manager] to commence the necessary remedies before the 90-day allotment of time passes.

### Amendments

The Land Manager**,** Landowner**,** and Resources Agencies may meet and confer, upon the request of any one of them, to revise the Management Plan to better meet management objectives and preserve the habitat and conservation values of the [Preserve, Conservation Area, or Easement Area]. Any proposed changes to the Management Plan shall be discussed with the Resources Agencies and the Land Manager. Any proposed changes will be designed with input from all parties. Amendments to the Management Plan shall be approved by the Resources Agencies in writing, shall be required management components, and shall be implemented by the Land Manager. Changes in Landowner or Land Manager require an amendment to this document.

If CDFW or USFWS determine, in writing, that continued implementation of the Management Plan would jeopardize the continued existence of a state or federally listed species, respectively, any written amendment to this Management Plan, determined by either the CDFW or USFWS as necessary to avoid jeopardy, shall be a required management component and shall be implemented by the Land Manager.

### Notices

Written notices should be in electronic format where possible. Any notices regarding this Management Plan shall be directed as follows:

Land Manager (name, address, telephone, and email)

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Landowner (name, address, telephone, and email)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Resources Agencies

U.S. Army Corps of Engineers

\_\_\_\_\_\_\_\_\_\_\_ District

[DISTRICT ADDRESS]

Attn: Chief, Regulatory Branch

Telephone:

Fax:

U.S. Fish and Wildlife Service

\_\_\_\_\_\_\_\_\_\_\_\_\_ Office

[FIELD OFFICE ADDRESS]

Attn: Field Supervisor

Telephone:

Fax:

U.S. Environmental Protection Agency

Region IX

75 Hawthorne Street

San Francisco, CA 94105

Attn: Director, Water Division

Telephone: 415-947-8707

Fax: 415-947-3549

California Department of Fish and Wildlife

\_\_\_\_\_\_\_\_\_\_\_\_Region

[REGION ADDRESS]

Attn: Regional Manager

Telephone:

Email:

California Department of Fish and Wildlife

Habitat Conservation Branch

Environmental Review and Permitting Program

CESA Program

[CESA@wildlife.ca.gov](mailto:CESA@wildlife.ca.gov)

## Funding and Task Prioritization

### Funding

[*The list of tasks in Table 1 is not meant to be exhaustive and some sites may have more or fewer elements to consider depending on the attributes of the Preserve/Conservation/Easement Area.*]  
Attachment 3 summarizes the anticipated costs of start-up, interim, and long-term management for the [Preserve, Conservation Area, or Easement Area]. These costs include estimates of time and funding needed to conduct the monitoring and management tasks outlined in the Management Plan and [a prorated/ compounding interest] calculation of funding needed to fully replace the fences every \_\_\_\_\_ years. Pursuant to the Permits, the total annual funding anticipated is approximately $**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**, therefore, with the current annual estimated capitalization rate of \_\_\_\_, the total endowment amount required is $**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**.

The Endowment Manager [and Monitoring Endowment Manager] shall, at all times, hold and manage the Endowment Fund [and Monitoring Endowment Fund, respectively] in compliance with the Permits, Government Code sections 65965-65968, as amended, and Probate Code sections 18501-18510, as amended.

The Land Manager shall consult with the Endowment Manager [and Monitoring Endowment Manager] annually to determine the amount of funding available for management and monitoring activities. The Land Manager may invoice the Endowment Manager [and Monitoring Endowment Manager] for monitoring and management activities as dictated by the terms of any endowment agreements. In the event of any conflict between an endowment agreement and the Permits, the CE, or this Management Plan, the terms of the Permits, the CE, and the Management Plan shall control.

### Task Prioritization

Due to unforeseen circumstances, prioritization of tasks, including tasks resulting from new requirements, may be necessary if insufficient funding is available to accomplish all tasks. The Land Manager and Resources Agencies shall discuss task priorities and funding availability to determine which tasks will be implemented. In general, tasks are prioritized in this order: (1) required by a local, state, or federal agency; (2) tasks necessary to maintain or remediate habitat quality; and (3) tasks that monitor resources, particularly if past monitoring has not shown downward trends. Equipment and materials necessary to implement priority tasks will also be considered priorities. Final determination of task priorities in any given year of insufficient funding will be determined in writing by the Resources Agencies in consultation with the other Parties   
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*The following section is to be completed by the Resources Agencies responsible for approving this Management Plan.*

[CDFW/The Resources Agencies] approve[s] this Management Plan for the **[*Insert Name*] [Preserve, Conservation, or Easement Area].**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

[Name]

[Job Title]

[Branch/Region/Division/etc.]

[Department/Agency]

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

[Name]

[Job Title]

[Branch/Region/Division/etc.]

[Department/Agency]

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

[Name]

[Job Title]

[Branch/Region/Division/etc.]

[Department/Agency]