



## Wildlife Reserves Development Policy

### Scope of this Policy

This policy sets out the views of the Scottish Wildlife Trust (SWT) in relation to the acquisition, management and disposal of areas of land recognised as SWT Wildlife Reserves.

### Policy Headline

The Scottish Wildlife Trust defines the purpose of its reserve network as follows:

**“The Scottish Wildlife Trust will acquire and maintain a network of wildlife reserves to safeguard a broad representation of wildlife found throughout Scotland, and to act as examples to others and for the public benefit including enjoyment, information and education.”**

Collectively the Trust reserves will meet this definition, although not all of the functions stated above will be found on every reserve. The overriding function of the reserves should be for the protection and enhancement of Scottish wildlife.

Management of the Trust reserves reflect the wider local, regional and national habitats and species requirements, contributing to land management and policy initiatives which support the conservation of Scottish wildlife.

### Rationale

1. Wildlife needs a place to live. The system of wildlife reserves, maintained by the Trust, other non government organisations and individuals, supplements and complements the statutory site network (SSSI, SAC, SPA, RAMSAR) and land managed for wildlife in the wider countryside (includes Wildlife Sites, areas on farms, private land etc.). Where possible, working with neighbouring landowners and other organisations, the Trust will consider how its reserves can benefit habitat range and species populations at the national, regional and ecosystem level.
2. The Trust considers that the acquisition of reserves gives such areas of land security, continuity of management, a high standard of care and control of land uses in favour of wildlife whilst providing it with hands-on experience of management which establishes the Trust's credibility in practical wildlife conservation. This knowledge can then be used by the Trust to encourage others to adopt similar practices, either directly or indirectly by influencing government policy.
3. In order for the Trust to fulfil the purpose of the network as defined above it is required to acquire and dispose of reserves from time to time. The Trust currently manages 123 reserves covering 20,080ha.
4. The Trust's reserves provide places where people can see, learn about and enjoy wildlife in a controlled environment. They also provide a focus for Trust members and activities and an opportunity for the Trust to encourage more people to understand and engage with the values of the organisation.
5. In order for the Trust to maintain a network of reserves, to the required standard, that fulfils the defined purpose it has to consider the acquisition and disposal of reserves within a clearly defined policy and procedure. This procedure should be based on an objective assessment of the potential reserve, its intended purpose and its impact on the organisation and the existing reserve network.

### Protecting Scotland's wildlife for the future

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## Policy Statement

### The Reserve Network

6. The Trust will consider acquisitions and disposals, via application of the approved policy, within the context of the overall reserve network. The network should aim to be broadly representative of all forms of Scottish wildlife and be managed and maintained to agreed objectives and standards. These objectives and standards should be clearly defined within a costed management plan.

### Policy Guidelines for Acquisitions

7. A standard two stage process is used to assess candidate reserve acquisitions (see Annex 1). Reserves may be put forward for consideration by any SWT member (through the Regional Committee / Member Centre) or any staff member in consultation with the Head of Conservation. The Conservation Strategy Committee will consider the proposal and make a recommendation to Council who will take the decision.
8. The Trust will acquire reserves that it has assessed to be of:
  - ♦ significant importance for biodiversity conservation; or where it provides a significant opportunity to demonstrate methods of conservation management or as a place to inform and educate the public; or
  - ♦ where it enhances or protects an existing reserve.
9. The Trust will only acquire reserves where it can demonstrate it has the necessary resources to acquire and manage the reserve to the required standard for a period of at least ten years.
10. Any new acquisition should not affect the ability of the Trust to manage its existing reserves to the required standard.
11. The Trust must demonstrate that acquisition is the most appropriate means of securing the future of the site.
12. Wherever possible reserves will be owned by the Trust.

### Policy Guidelines for Disposals

13. The Scottish Wildlife Trust is a registered charity and is a company limited by guarantee. Its objects (3h) as detailed within its Memorandum of Association empower the Trust to sell or otherwise dispose of any land which it considers to be of insufficient botanical, zoological, geological, archaeological, or other scientific or educational interest, subject to the law.
14. Notwithstanding the legal position, it is the firm policy of the Trust not to dispose of reserves unless exceptional circumstances arise.
15. Reserves managed under agreements will be assessed, as per a new acquisition, when agreements are due to expire. The Trust will review them objectively, tempered by due acknowledgement of the amount of resources previously committed to the site. In the event of a review demonstrating that a wildlife reserve cannot meet the criteria, the Trust will consider the most appropriate options for the ongoing management of the site with the owner.
16. Out with this review period, reserves managed under agreement, as well as those which are owned or leased, will only be considered for disposal (termination of agreement) in exceptional circumstances as illustrated below;
  - ♦ Unacceptable changes made by owners to existing agreements
  - ♦ Unacceptable changes to policies that affect reserves managed under lease/agreements
  - ♦ Termination of an existing agreement/agreement due for renewal by owner
  - ♦ Compulsory purchase orders
  - ♦ Inability of the Trust to manage the reserve due to unforeseen/unplanned events by third parties including neighbouring landowners

- ◆ Inability of the Trust to manage the reserve to the required standard or purpose
- ◆ Requests of land/buildings, where no commitment has been given, that do not fulfil the acquisition criteria
- ◆ Alternative organisations, partnerships or groups come forward who are better placed to manage the reserve to its defined purpose
- ◆ Reserves put forward for consideration of disposal will follow the same procedure as for acquisitions, with Council taking the final decision.

### **Policy Guidelines for Management**

17. All Trust reserves, held under any tenure, will be managed in accordance with a ten year management plan. The reserve management plan (RMP) will be produced within 12 months of initial acquisition. All management decisions and activity will be undertaken in accordance with the objectives and actions as stated within the RMP. A risk assessment, allied to the RMP will be reviewed annually.
18. The RMP will define how the reserve can link and contribute to wildlife conservation initiatives at the local, regional and national scale.
19. The Trust will consult with tenants, neighbouring landowners, active Trust members, statutory agencies and other stakeholders in the preparation of the RMP where appropriate.
20. The Trust will seek to implement the necessary actions required to meet the objectives as stated within the RMP. The ability of the Trust to undertake these actions will be dependent on the availability of resources. Notwithstanding this the Trust will maintain its reserves to a minimum standard, defined in the RMP, which will include implementation of all necessary legal and health and safety requirements.
21. The Trust will seek to manage its reserves in accordance with best practise. Where it is in a position to do so, the Trust will use its reserves to demonstrate best practise or innovation to others.
22. The Trust will seek to maintain an inventory of habitats and species which occur on its reserves. These data will be managed and shared in accordance with the principles outlined by the National Biodiversity Network. The Trust retains the right to withhold any information relating to its operations or habitats and species which it deems sensitive or which could lead to a detrimental impact on the organisation or the wildlife on its reserves.
23. The Trust will seek to maximise the value of its reserves to the local community. This will be done by facilitating access, encouraging local member involvement and supporting local businesses and contractors where possible.
24. Unless specifically stated all wildlife reserves are open to the public. Where facilities are provided the Trust retains the right to levy an appropriate fee. Due to operational, health and safety or conservation related matters access may be restricted to reserves or specific areas of reserves at certain times. This is in accordance with the Land Reform (Scotland) Act 2003 and the Scottish Outdoor Access Code.
25. The Trust will rigorously defend its reserves from any activity or development which is counter to the objectives of the Trust or those specifically stated within the RMP.
26. The Trust will expect to receive market rate remuneration for any services, sporting rights, agricultural and commercial practices undertaken on its reserves. These activities can only be undertaken where they do not conflict with the objectives for the site stated within the RMP.

### **Links to other SWT Policies**

27. This policy is a revision to the current approved policy on the Acquisition, Review and Disposal of Wildlife Reserves, which was approved by Trust Council on 27<sup>th</sup> June 2001. This in itself was based on a previous policy approved by Trust Council in June 1996.
28. The following procedural documents have been developed to assist with the application of this policy;

- ◆ Annex 1 – Procedure For Acquisition, Review & Disposal of SWT Wildlife Reserves
- ◆ Annex 2 – SWT Wildlife Reserves Stage 1 Assessment Form
- ◆ Annex 3 – SWT Wildlife Reserves Stage 2 Guidance for Staff & Members
- ◆ Annex 4 – Stage 2 Resources Forms
- ◆ Annex 5 – Stage 2 Reserve Assessment Form

**This policy should be reviewed in 2008.**

**Approved by Council 23/3/2005**

**Annex 1.**

**Procedure for reserve acquisition, review and disposal**

**Introduction**

This procedure paper is to be read in conjunction with “The Scottish Wildlife Trust Wildlife Reserves Development Policy”

There are two elements to the consideration of any site as an SWT reserve:

1. The **policy**. This sets out policy guidelines that must be applied to all potential reserves and existing reserves.
2. The **procedure**. This sets out the procedure by which a reserve is considered for either acquisition or disposal. The **two stage assessment form** is a critical part of the procedure. This paper outlines the manner in which a proposal for a potential reserve is presented and the information that needs to be included.

**The Procedure**

Table 1 identifies the main steps by which the acquisition or disposal of a reserve is considered. The proposal is based on a standard two stage assessment form (see Annex 2 & 3). The *SWT Wildlife Reserves Context Report* (in preparation) can be used as a source of reference to determine the relative values of the reserve or potential reserve in question and the impact of acquiring/disposing of the reserve on the existing network.

**Table 1: Procedure for Consideration of Reserve Acquisitions & Disposals**

Stage		Action By	Decision	Action
<b>Stage 1 Assessment</b>				
1	Complete & self assess stage 1 assessment form	Staff or/and Regional Committee/Member Centre	Fail Pass	Do Not Proceed Proceed to next stage
2	Assess stage 1 assessment form	Head of Conservation/Chief Executive & Regional Committee representative	Fail Pass	Do Not Proceed Proceed to next stage
<b>Stage 2 Assessment</b>				
3	Complete stage 2 forms	Proposer & Head of Conservation		
4	Assess stage 2 proposal	Executive Committee	Fail Pass	Make Recommendation To Council
5	Assess stage 2 proposal	Conservation Committee	Fail Pass	Make Recommendation To Council
<b>Decision</b>				
6	Consider recommendations from Executive & Conservation Committees	Council	Fail Pass	Do Not Acquire/Dispose Acquire/Dispose

The key point is that there is an objective based process of selection by staff and <sup>1</sup>members. Where staff and members have a different view this should be recorded on the stage one assessment form for consideration by the Head of Conservation and Regional Committee representative (usually a Member Centre Chair). If the Head of Conservation puts a reserve forward at stage one for consideration, initial assessment would be made by the Chief Executive and Regional Committee representative (usually a

<sup>1</sup> It is recommended that members input is regulated by the RC / Member Centre

Member Centre Chair). If the Regional Committee representative (Member Centre Chair) puts forward a reserve for consideration an alternative Regional Committee representative will perform the initial assessment. If a consensus cannot be sought at this point the reserve should move on to the second more detailed assessment stage for consideration by the relevant committee.

The above will help ensure that the Trust committees only consider strongly argued proposals.

In considering any proposal it is important that there is balanced argument and debate. Any proposal can be made to fit the rules if all those involved in the selection process are passionately in favour of reserve acquisition. Achieving this balance is difficult. It is crucial therefore that all aspects of a reserve, including conservation, resources and membership are considered and input is sought from the relevant staff and committees. In order to make this process as objective as possible a detailed second stage assessment is specified.

Once all of the information has been compiled the proposal will be scored using a standard evaluation form. The score will act as a guide and assist with the decision making process. The target score may change over time and be affected by such things as knowledge of habitats and species, availability of resources, impacts of third parties etc.

Once the proposal has passed Stage 1 it will be considered by the Executive Committee (who will scrutinise the resource issues) and the Conservation Strategy Committee (who will scrutinise the conservation case). Council will then consider the recommendations made by these two committees and make the final decision.

Stuart Brooks  
**Head of Conservation**  
08 March 2005

**Annex 3.**

**Wildlife Reserve Assessment – Stage 2. Guidance for Staff & Members**

**Introduction**

This paper provides the necessary guidance to staff and members to complete the second stage of the reserve acquisition/disposal procedure. The procedure is outlined in “Procedure for reserve acquisition, review and disposal, March 2005” and should be read in conjunction with the SWT Reserves Development Policy, March 2005.

**Key Elements**

The second stage assessment is an attempt to consider the detailed proposal. The information provided at this stage will support the final decision. There are 3 main elements to the stage 2 proposal;

1. A detailed description and justification report
2. A detailed resource analysis
3. A summary assessment scoring form

**Stage 2 Report**

The following headings should be used in the stage 2 report. These headings link to the summary scoring form and should therefore be used to support the scoring assessment. Some of the required information builds on that already presented in stage 1. A required reference is the Reserves Context Report (final draft in preparation) which will enable comparative analysis with existing reserves. The recommendation and supporting justification is also detailed within this report.

<b>Report Heading</b>	<b>Guidance</b>
<b>Executive Summary</b>	Provide a bullet point summary highlighting the key aspects of the proposal and the supporting justification.
<b>Location</b>	Refer to context report for description of under represented areas.
<b>Extent</b>	Include the size of the site and an analysis of how this compares to other sites of similar habitat. Broadly speaking larger sites are more robust and are better for wildlife. If the site is adjacent or near to additional areas of similar habitat (including an existing SWT reserve) this should be explained.
<b>Wider Context</b>	Attempt to explain how the reserve can be used to contribute to conservation initiatives in the wider countryside. Make reference to any known habitats or species initiatives (eg, UK HAP, SAP, LBAP, habitat networks etc.).
<b>Habitats</b>	Include a description of the habitats present on the site. Try to follow the classifications within the Reserves Context Report – alternatively use Phase 2, NVC or UK BAP classifications. Refer to the Context Report to establish the current distribution and extent of habitats on reserves.
<b>Species</b>	Include a description of any species known to occur/breed on the site. Determine (by use of Context Report) if these are within under represented groups on existing SWT reserves or are of conservation concern.
<b>Designations</b>	List any designations (statutory or non statutory) and reasons for designation.
<b>Purpose</b>	State the intended purpose(s) for the reserve. Examples include; education, wildlife conservation, to increase scientific knowledge, to demonstrate a conservation management issue etc. Try to be as specific as possible and preferably frame these statements as objectives, eg. To safeguard a rare breeding colony of narrow headed ants.
<b>Threat</b>	Describe any known threats to the site. Be as specific as possible.
<b>Tenure</b>	Describe the proposed tenure of the reserve. Include reference to any known restrictions or legal agreements.

<b>Other Organisations</b>	Provide an account with supporting evidence (letters) to show that there are no other organisations who are willing and able to manage the reserve to the desired purpose and standard.
<b>Skills &amp; Knowledge</b>	Given the stated purpose describe any specialist skills or knowledge that would be required to manage the site and state if these are currently available within the Trust.
<b>External Factors</b>	Describe any limiting factors (eg. adjacent land use) that might impact on the ability of the Trust to manage the reserve to the stated purpose.
<b>Resources</b>	Complete the Stage 2 Resources Form (and provide as annex to the stage 2 report) and use this part of the report to explain any assumptions made. Provide a statement on the feasibility of meeting any estimated resource gaps.
<b>Other Information</b>	Present any other salient information. All stage 2 proposals should be supported by good quality maps (clearing showing the proposed site boundary) and photographs.

**Resource Analysis**

A standard set of forms has been provided (Annex 4) on an Excel spreadsheet which should be completed and attached as an annex to the Stage 2 Report.

**Summary Assessment Scoring Form**

A summary assessment scoring form (Annex 5) has been devised to assist with the evaluation of the information presented within the Stage 2 Report. The scoring process is there to act as a guide only and make sure that all elements of the proposal have been covered. Guidance is provided on the scoring form to facilitate self assessment although the responsible committee will undertake its own scoring evaluation.

**Presentation of Proposal**

The proposer should liaise closely with the Head of Conservation in preparation of the Stage 2 Report. The Head of Conservation can provide guidance on the necessary information, presentation and timing of the proposal. Individuals are encouraged to present their proposal to the Executive and Conservation committees in person, where they can respond to questioning.

Stuart Brooks  
**Head of Conservation**  
 15 March 2005