



FOR MANAGING BIODIVERSITY AND SPECIAL PLACES

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Conservation Management Planning using CMSi by Anne Brookes

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Overview

- What is CMSi?
 - Summary of key features of the software
 - CMS Consortium
- Why use CMSi?
 - Management Planning process and questions
 - How CMSi addresses these
- How does CMSi work?
 - Demo of the software
- Further information and questions

What is CMS*i*?





CMSi software

The screenshot displays the CMSi v3.2.4 software interface. The main window is titled "CMSi v3.2.4 CMSi Tutorial" and shows a map of the Bron Coed area. The map is overlaid with a yellow polygon representing the site boundary. Key features on the map include the A498 and A4085 roads, the Afon Glaslyn and Afon Dylif rivers, and various locations such as Hafod-Y-Llyn-Uchaf, Talymri, Parc Mawr, Bryn Twr, and Bryn Fedw. The interface is divided into several panels:

- Left Panel (Planning):** Contains a "Site Tree" and "Project Tree" view. The "Project Tree" shows a hierarchy starting with "Wildlife Trust Reserves", followed by "North Region", "Bron Coed", and "Monitoring - Factors". Under "Monitoring - Factors", there are several "Factor" entries: "Rhododendron", "Grazing by sheep", "Beech", "Fire", and "Public Recreational Pressure". A "Project" entry is also visible: "RH33/04-MONITOR IMPACT OF PUBL".
- Top Panel (Map):** Shows the map with various navigation and tool icons. The status bar at the bottom indicates "259150,343661 - 147kb Sites 1 record(s) selected Map width (km): 2 Sites.NNR001 - Bron Coed".
- Right Panel (MyCMSi):** Contains a "How Do I...?" section with a list of links: "Work Recording Guidance", "Planning Tasks", "Copying mapping from an external GIS lay", "Management Planning Guidance", "Maintaining your Management Plan", "End of Year Review", "Producing a Full Management Plan Report", and "Quick Ways to Enter a Management Plan". Below this is a "Reporting" section with buttons for "Plan Management", "Admin", "Work Recording", "Bookmarks", and "My Actions".



Conservation Management System

- is a desktop, management system for planning, recording and reporting
- includes mapping to show you where things are
- makes your management plan a working tool
- can be customised for different user roles
- can be used in any language
- is modular to allow integrated management
- has web and mobile components



CMSi Modules



- **Planning**
- **Agreements and Rights**
- **Ownership**
- **Grants**
- **Contacts**
- **Assets, Heritage and Buildings**
- **Species and Vegetation Recording**
- *Survey and Monitoring (coming in 2017)*



CMS Consortium

- CMSi is owned and was developed by an international partnership of conservation organisations – the CMSC
- CMS software first developed in 1990s; became CMSi in 2011
- CMSC promotes best practice in adaptive management through tools and training
- CMSi software is developed and managed by exegesis SDM Ltd (ESDM)



Why Use CMSi?





Management Planning

Why make a Management Plan?

- To record legal and policy constraints
- To identify what is important
- To make decisions about what to do
- To share the decisions and information with others
- To store and manage all information about a site in one place
- To provide continuity of management



Management Plan Key Questions

What should a Management Plan address?

1. Why are we here? (**Legislation and Policy**)
2. What have we got? (**Description**)
3. What is important? (**Features**)
4. What do we want? (**Objectives**)
5. What are the influences? (**Factors**)
6. What must we do? (**Action Plans**)
7. How are we doing? (**Reporting and Review**)



Key Questions 1-2

1. Why are we here? (**Legislation and Policy**)

2. What have we got? (**Description**)

→ **CMSi Site Description**

Map x Sites x Site Description x

Bron Coed

- 1: INTRODUCTION
- 2: POLICY STATEMENTS
- 3: GENERAL DESCRIPTION
 - 3.1: General Information
 - 3.1.1: Location & site b
 - 3.1.2: Tenure
 - 3.1.3: Management/or
 - 3.1.4: Site infrastruc
 - 3.1.5: Map coverage
 - 3.1.6: Photographic co
 - 3.2: Zones
 - 3.3: Environmental inform
 - 3.3.1: Physical
 - 3.3.2: Biological
 - 3.4: Cultural
 - 3.5: People - Stakeholders
 - 3.6: Landscape
 - 3.7: Bibliography
- 4: Nature Conservation Featu

2 Entire Description

Calibri 11

2: POLICY STATEMENTS

Access

CCW will encourage the sustainable public use of Reserves in so far as such use

i) is consistent with our duty to maintain or restore the nature conservation features to Favourable Condition Status.

ii) Does not expose visitors to any significant hazards.

All legitimate and lawful activities will be permitted in so far as these activities

i) are consistent with our duty to maintain or restore the nature conservation features to Favourable Condition Status.

ii) Do not expose visitors to any significant hazards

iii) Do not diminish the enjoyment of other visitors to the site.



Key Questions 3-4

3. What is important? (**Features**)
 4. What do we want? (**Objectives**)
- ➔ **CMSi Features and Objectives**

The screenshot displays the CMSi software interface. On the left, a tree structure under 'Wildlife Trust Reserves' shows 'North Region' expanded to 'Bron Coed', which contains a list of features. The 'Upland acid oakwood' feature is highlighted with an orange box. On the right, the 'Features' window is open for 'Bron Coed - Upland acid oakwood'. It shows 'Number: 1' and 'Name: Upland acid oakwood'. Below this is a table with columns: Description, Classification, Objective, Status, Rationale, Contacts, and Linked Assets / Heritage. The 'Objective' column is highlighted with an orange box. Below the table is a text area containing a description of the woodland.

Description	Classification	Objective	Status	Rationale	Contacts	Linked Assets / Heritage
Most of the reserve is broadleaved woodland, dominated by oak and birch. Trees vary in age and temporary glades formed by fall or death of trees is slowly filled by naturally regenerating landscape of shifting light and shade, where as much as a quarter of the woodland may be covered in woodland.						



Key Question 5

5. What are the influences? (**Factors**)

➔ **CMSi Factors and Attributes**

The screenshot displays the CMSi software interface. On the left, a tree structure is visible under the 'Planning' tab, showing a hierarchy: Wildlife Trust Reserves > North Region > Bron Coed > Feature: Upland acid oakwood. Under 'Monitoring - Factors', several factors are listed: Rhododendron, Grazing by sheep, Beech, Fire, and Public Recreational Pressure. Under 'Monitoring - Attributes', several attributes are listed: Volume of Dead Wood, Extent of the Woodland, Tree Canopy Cover, Canopy Gap Creation Rate, Species Composition of the Canopy, and Natural Regeneration of Native Trees. On the right, a 'Factors' dialog box is open, showing the current site as 'Bron Coed', feature as 'Upland acid oakwood', and factor as 'Rhododendron'. The dialog includes input fields for 'Number' (set to 1) and 'Name' (set to Rhododendron). Below the dialog, a table lists projects:

Project	Project Title
RF14/02	MONITOR FLOWERING RHODODENDRON SEEDLINGS



Key Question 6

6. What must we do? (**Action Plans**)

➔ **CMSi Projects and Plans**

The screenshot displays the CMSi software interface. On the left, a 'Project Tree' shows a hierarchy under 'Upland acid oakwood'. The 'Monitoring - Factors' section is expanded, showing several factors: Rhododendron, Grazing by sheep, Beech, and Fire. Under the 'Fire' factor, a project 'RH02/01-RECORD UNPLANNED FIRES' is highlighted with an orange box. This project has a list of annual entries from 2011 to 2016, with the 2016 entry '2016 - Minor fire in area near Lake - 50%' highlighted in green.

On the right, a 'Project Plans' window is open for 'Bron Coed - RH02/01'. It shows the following details:

- Project Code: RH02
- Number: 1
- Project Title: RECORD UNPLANNED FIRES
- Project Finished:
- Area: 0.00

Below the details is a table with columns: Description, Annual Projects, Project Tags, Mapping, Project Data, and Contacts. The 'Project Data' column is active, showing a table with 'Financial Year' and 'Project Outcome' columns.

Financial Year	Project Outcome
2011/12	No fires
2012/13	No fires
2013/14	Minor fire in North Wood
2014/15	No fires
2015/16	No fires
2016/17	Minor fire in area near Lake



Key Question 7

7. How are we doing? (Reporting and Review)

MyCMS

How Do I...?

Reporting

- Annual Project List with Resources
- Multi-site Resource Summary
- Annual Project Expenditure Review
- Asset Inspections Due
- Work Plan for the Current User
- Staff Work Plan - Project Descriptions
- Annual Work List By Staff**



Work Recording

Plan Management

Admin

Bookmarks

My Actions

 **Annual Work List By Staff** 

Area Monitoring Officer

NNR001 : Bron Coed

Project Code	Project Title	Start	End	Priority	Time (Days)
MH41/01	RECORD SHEEP AND CATTLE GRAZING NUMBERS	01/04/2016	31/03/2017	1	2
Site total:					2.00
Total for all sites:					2.00

Area Warden

NNR001 : Bron Coed

Project Code	Project Title	Start	End	Priority	Time (Days)
AP20/02	REVISE / UPDATE MANAGEMENT PLAN	01/11/2016	28/02/2017	1	1
AP20/03	SITE AUDIT	01/03/2017	31/03/2017	1	2
Site total:					3.00
Total for all sites:					3.00

Assistant Warden

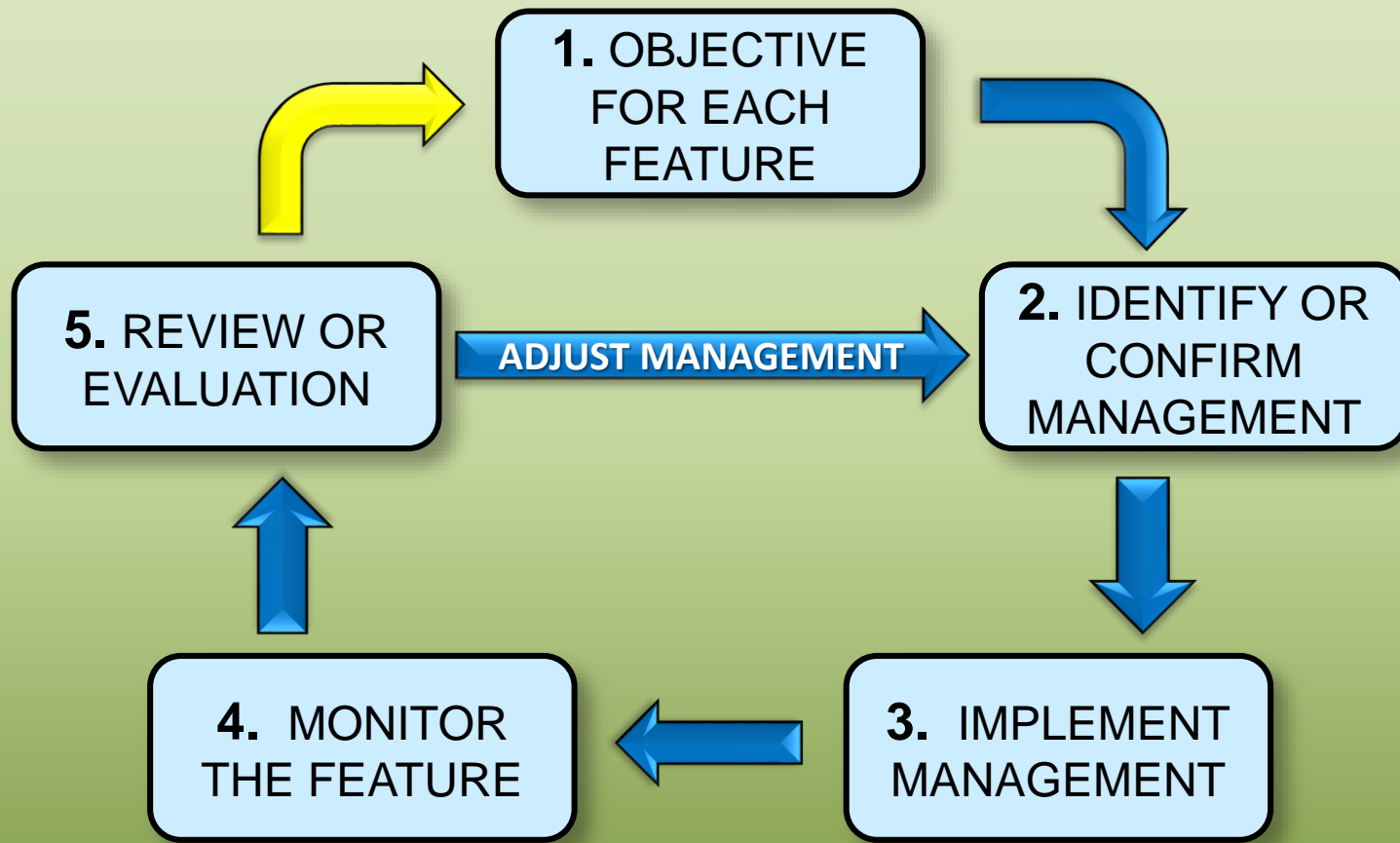
NNR001 : Bron Coed

Project Code	Project Title	Start	End	Priority	Time (Days)
A30/01	SITE HAZARD INSPECTION AND ASSESSMENT	01/04/2016	31/03/2017	1	3
MI10/01	ERECT AND MAINTAIN SIGNS	01/04/2016	31/03/2017	1	0.5
MI50/02	KEEP LOCAL DISTRIBUTION POINTS STOCKED WITH LEAFLETS	01/04/2016	31/03/2017	2	2
MI50/03	DESIGN AND MAINTAIN INFORMATION ON NRW WEBSITE	01/04/2016	31/03/2017	2	1

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Adaptive Management Process



How does CMSi work?



CMSi

- Demo...

Further information and questions





CMSi in action

- 800+ licences in use by over 50 organisations across UK, Channel Islands, Netherlands, Belgium and Canada
- Used by national agencies in UK and Netherlands, local government, national and local charitable organisations and universities
- Over 5,000 sites managed by Natural England in CMSi



CMSi – Further Information

- Any questions?
- Website: www.software4conservation.com
- exeGesIS: www.esdm.co.uk

