Ongoing stewardship & Management Workshops report

Demand for this workshop was such that it was run on three occasions, each as a 2½ hour session facilitated by Jane Elix and Dr Judy Lambert from Community Solutions. Either Greg Blake (until very recently Principal Policy Officer, Vegetation Incentives Program, Department of Natural Resources and Mines in Queensland) or Kathy Tracy (Department of the Environment and Heritage, Canberra) presented information relating to tax and other financial considerations associated with stewardship payments. Note-taking throughout the workshop by Dr Judy Lambert, Community Solutions provided the basis of this report.

Consistent with the program provided in the workshop training manual distributed to all participants, each workshop session was structured in modules addressing

- What is stewardship?
- The need for greater uptake of stewardship initiatives and the barriers to increased uptake.
- Existing incentive mechanisms – their strengths and weaknesses.
- Funding of stewardship arrangements and the implications of that funding for tax and other arrangements.
- Formal mechanisms needed to underpin longer-term stewardship arrangements.
- What participants can do to strengthen stewardship arrangements?

The key objectives of the workshop as identified by the facilitators were

- Recognising the importance of developing a shared understanding of 'stewardship' and the need for that shared meaning when entering stewardship negotiations
- Getting the support mechanisms right to support and sustain stewardship
- Being aware of the financial implications of stewardship payments.

While each of the three workshop sessions generally resulted in similar outcomes, the number and mix of participants and their experiences, and the fact that the workshop was designed to be interactive and to benefit from the collective knowledge of those involved, meant that each session produced some variations unique to that session.

What is stewardship?

Judy Lambert briefly introduced the notion of stewardship for natural resources, land and the environment, and highlighted the likely divergence of emphasis placed on 'stewardship' by different people as a result of their value systems, past experiences and expectations. Some examples from the literature were presented in the workshop manual.

Workshop participants were then asked to work in pairs to identify the key elements of 'stewardship' from their perspectives.

Key themes emerging were

- That stewardship is about 'care for' rather than economic 'use of' the land – a focus on 'custodianship'. It involves building a relationship, connecting or bonding with the land to achieve the best possible outcomes into the future
- That it has a long-term rather than a short-term focus – caring for biodiversity, ecosystem function and landscape integrity, and providing for future generations
- That stewardship must encompass production land as well as land set aside for conservation, finding a balance between economic and environmental aspects of management
- That it should encompass supporting the people as well as the land, being about 'nurturing' both people and their land and providing 'pastoral care'
- That it goes beyond what it is normally expected as a 'duty of care', reaching beyond self-interest and grasping the greater good
- In some cases going that extra distance may mean that people have to be paid for those actions. This is about 'normalising' those activities and giving them value. Changed attitudes to smoking were used as an analogy in one session – normalising actions to protect human health and in this case to protect the health of the land
- That there are many landholders who are not part of any scheme but are quietly getting on with doing stewardship activities. A change is required in broader community attitudes so that these actions are acknowledged as part of a recognition that the land may need active management to retain its values into the longer term. However, it was also noted that there are tensions between 'normalising' stewardship and publicly recognising stewardship activities. The role of the urban ecological footprint was also discussed as part of this process.

The Friday morning group also observed that 'stewardship' is a philosophy that is both ongoing and iterative in its development. Friday afternoon's group also identified the importance of planning for gradual improvement and highlighted the importance of observation and monitoring in maintaining stewardship.

On Friday afternoon the group also questioned whether 'stewardship' is a term much used or understood in the wider community. This was especially highlighted by participants coming from Local Government.

The need for greater uptake of stewardship initiatives and the barriers to increased uptake

There has clearly been significant growth in conservation convenanting and other initiatives directed towards stewardship of the land in recent years. Other presentations at this forum have, however, highlighted just how little of Australia's landscape is part of a formal stewardship program of any type. Even allowing for the fact that there are landholders and managers quietly doing their own stewardship, much remains to be done.

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This session was directed to addressing the barriers to increased stewardship, with participants working in small table groups of 6-8 people to identify barriers to greater uptake of stewardship and to suggest possible solutions.

Two overriding factors were seen to influence uptake of or participation in stewardship

- The relative valuing of property for rural production as compared with its value for conservation outcomes, and
- Rural self-image or personal identity, context and lifestyle preferences – the need to overcome cultural barriers.

Also identified by some groups were

- The inappropriate timeframes applied to incentive programs (3-4 years political cycles) compared with the times needed to achieve real change (10 year minimum in many cases)
- Incentives that provide financial benefits too small to warrant the onerous processes involved in obtaining them
- A sense that 'what gets measured gets done' i.e. a need for monitoring, but at the same time monitoring that is relevant and meaningful for those who have to use it
- Misunderstanding of the implications of covenants and a fear that they will result in loss of land tenure
- A lack of trust of Local Government as a possible provider of covenants and stewardship incentives
- A fear of change, especially when backed by a lack of evidence that what is being proposed will actually work
- A lack of adequate 'biodiversity extension work' (as compared with agricultural production extension, which although reduced from the past 1:1 arrangements, is still strong compared with a biodiversity focus).

The current high turnover of properties, in which covenants can be a benefit to the right buyer, will also build some resistance as current owners see them as a barrier to future flexibility or an encumbrance on future generations in their family

Greg Blake illustrated the importance of cultural aspects and perceptions by seeking participant identification of the following sketch.

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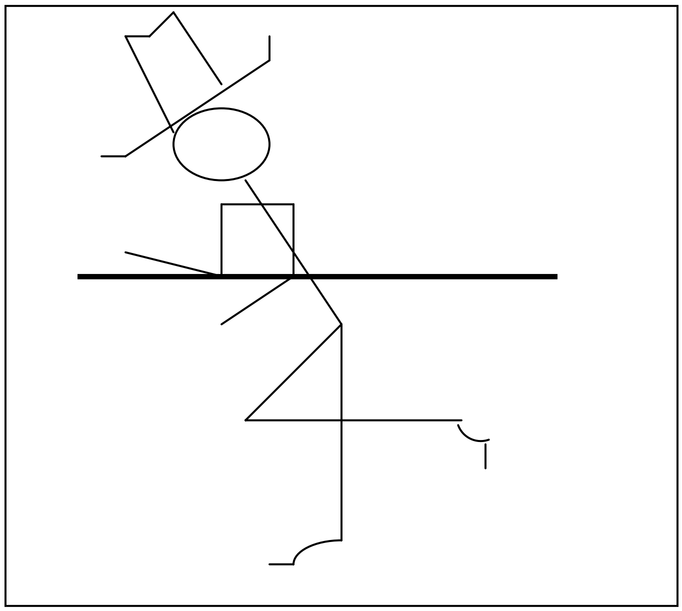

Greg also noted that farmers/landholders are not a uniform culture and that we all need to take care in stereotyping them. As an example, Greg talked of the ‘conservation farmer’ who is doing the right thing by the land but may have to sell out because he is not making sufficient money to sustain his family needs, the ‘corporate farmer’ who buys more land as a business transaction but may lack a stewardship ethic, and the ‘recalcitrant farmer’ who is not doing the right thing by the land, is reluctant to change and may have to be bought out in order to enhance stewardship of the area.

Resistance was seen as being

- age-related- moving people outside their ‘comfort zone’, especially where working with an aging sector
- fueled by fear of ‘greenie’ agendas, and/or a lack of trust in government providers of the agreements
- failure to connect with the identity and needs of those being targeted – need to work with local communities, listen and work with their agendas, rather than seeking off-the-shelf packages. Make them relevant.
- misunderstanding of the implications of measures proposed, in particular fear of loss of tenure or control over the land and its management – with an associated loss of development rights, and a loss of personal identity
- sometimes seen as an impediment to the ability of next generation to manage according to their needs and wishes
- a lack of evidence that the changes being proposed will work on-ground

- processes seen as too onerous to warrant the small amount of funding/financial benefit available
- a lack of landholder time to implement the changes sought through stewardship arrangements – in part a matter of a hierarchy of needs, but also of priority-setting
- resistance to change that is part of human nature
- timeframes of the programs – Noted that in the USA Auctions and Tenders are funded in a 10 year cycle enabling some real change
- Failure to measure what is being done and what changes occur. What gets measured (and recognised) gets done. Dairy industry has demonstrated this in other aspects of management and it should be extended to stewardship. Follow-up is also an important part of this
- in part based on gaps in knowledge, and in particular a lack of education about the biodiversity aspects and the benefits of changed management

Mechanisms identified as helping to overcome the cultural barrier included:
- Working with 'champions' in rural areas – longer-term residents who are respected in their community and can overcome age and tradition related fears of change brought about by other people's agendas. Get runs on the board and create a sense of public responsibility and benefit to be gained
- Structuring Conservation Agreements so that they are a shared document, rather than one prescribed by the agency administering
- Understanding the value systems and key motivators of the people we want to change and working with those. Listening to locals, in groups but also individuals on their place, as part of that
- Researching what is needed on-ground and working with landholders and managers to deliver that, rather than planning 'top down' projects designed by policy or research staff working in isolation from the landholders/managers. Providing 'biodiversity extension', including some 1:1 information sharing, as has been done over a long time with agricultural extension
- Finding the best opportunities for change across the landscape, based both on physical need and on the personalities involved (e.g. strive initially for a 60% result)
- Providing access to Green Corps and other labour market programs (such as the Land Mate prison worker scheme) which can assist in getting on-ground work done, but ensure that these programs are not themselves too onerous on the end-user
- Building understanding of the impacts over time of neglectful practice (drawing parallels with other more familiar areas of practice change such as the anti-smoking campaign)
- Acknowledging recent positive changes and at the same time pressuring those who are "doing the wrong thing" by the land
- Working through agri-business officers and others who are already providing advice
- Using regulation, but tailoring it to affect only those who resist change
- Buying out recalcitrant owners who have no intention to change.

Providing a wide range of incentives, requiring different levels of commitment, carefully assessing individual needs and values, and tailoring the incentives to these were widely agreed as important.

One remaining question is how to engender personal responses to biodiversity conservation and stewardship in urban, as well as rural, residents.

Existing incentive mechanisms – their strengths and weaknesses

There are a wide range of incentives currently available, or identified as having potential. These can be summarised as follows.

TYPE OF INSTRUMENT	*EXAMPLE*
Motivational instruments	Land for Wildlife Riverland Champions, SA
Information instruments	Land for Wildlife Helmeted Honey Eater project, Vic
Voluntary instruments	Voluntary Conservation Agreements
Duty-based instruments (Duty of Care)	Codes of Practice e.g. sugar mill requirements in Tweed Valley, NSW
Financial instruments	Market-based instruments – stewardship or ecosystem service payments etc, e.g. WA Bush Tender, Private Forest Reserve program in Tasmania
Property-right instruments	Tradable salinity offsets
Regulatory instruments	Requirement to obtain permission to clear native vegetation

Asked to identify the **strengths and weaknesses of each of these incentives**, participants generally expressed a view that this was not possible to do in generic terms because of the importance of assessing the individual situation – the process, and work within the community were identified as the keys to success, not the matrix of incentive tools. Participants in all three workshop sessions stressed the importance of having a mix of tools available, but also of taking account of the person, their age, circumstances (are they managing the land themselves, what is their value set etc), and the time in their life cycle. One participant described this as "putting on the landholder's hat and finding out what they need". Participants addressed the importance of economic, social and environmental needs and of establishing enough trust to elicit real needs, rather than what might be initially expressed needs.

In discussing how to decide what is the right incentive mechanism, some workshop participants objected to the term 'instrument', indicating that it is economic jargon, others seeing it as 'sterile' jargon better used in hospital than in natural resource management.

"Rural Liaison Officers" – people who are respected in their own communities and have empathy and an ability to listen and communicate effectively with their landholder and manager peers – can play an important part in this process, as Community Solutions demonstrated with its NHT1-funded Grassy White Box Woodland project on the western slopes of NSW.

The role of eco-real estate in recognising the non-production values of a property and in making transparent now what these values are contributing for the future was also discussed in one session.

Funding of stewardship initiatives and the implications for tax and other arrangements

Stewardship payments are generally a form of income for the recipient and as such they will bring with them taxation and other financial implications.

Greg Blake (or in the Friday afternoon session Kathy Tracy) addressed some of these issues using an Information leaflet prepared by PriceWaterhouseCoopers for the Queensland Department of Natural Resources and Mines. Titled 'Tax information for Landholders Participating in the Vegetation Incentives Program(VIP)', this information highlights the importance of seeking professional advice from someone qualified to provide formal 'tax advice', and stresses the point that from a taxation perspective each case and each inquiry is unique and cannot be addressed through general advice.

It was also noted that where a landholder enters into a permanent conservation covenant, s/he will be eligible for some tax concessions, but that the covenant must be administered by an organisation accredited to do so. Information about accredited covenant providers is available on the Department of Environment and Heritage website.

Whether a covenant is an asset or a liability, whether a payment is a grant or a payment for services, Capital Gains Tax interpretations, and a broad range of other issues influence interpretation of the tax implications in any particular situation.

Formal mechanisms needed to underpin longer-term stewardship arrangements

That stewardship payments are provided from the public purse or from public contributions to community-sector providers brings with it an obligation to ensure that the funds are spent wisely and that their allocation is transparent and accountable.

The importance of putting **monitoring**, **documentation**, and **reporting** mechanisms in place **at the start** and of identifying people within the project who will take responsibility for ensuring that these are **maintained**, was stressed.

Issues relating to **public liability** where a landholder enters into a covenant, especially where that covenant is on long-term leasehold land, were also discussed briefly.

While these issues were not addressed in any detail during the workshop, participants were directed to pages 27-33 of the Training Manual provided for guidance on these issues. The DEH publication 'Gifts that Keep on Giving' was also provided as a relevant guide.

What participants can do to strengthen stewardship arrangements

As the final section of each workshop session, participants were asked to identify (using Post It Notes) what they can/will individually do to improve stewardship arrangements in the short to medium-term.

A rich diversity of actions resulted. These can be grouped as follows.

- Normalising 'stewardship' as a land management activity
- A range of government policy and program initiatives
- Appropriate planning and clarification or goals, roles & responsibilities
- Raising awareness and encouraging use of professional advice in relation to taxation and public liability implications of stewardship payments, covenants and other arrangements
- Encouraging local partnerships, solutions and actions
- Taking greater account of social and cultural diversity among potential stewardship participants
- Expanding the funds and the diversity of incentives available
- Building on-ground aspects of stewardship
- Improved education on various aspects of stewardship
- Monitoring, record-keeping & the importance of case studies
- Recognising the importance of 'blue sky' approaches
- Getting started

For details of the individual responses, see Attachment 1 below.

Workshop evaluation

At the conclusion of each workshop session participants were invited to provide feedback by way of Brickbats and Bouquets provided on Post It Notes. Participants in each of the three sessions differed somewhat in their comments. The results of this evaluation can be summarised as follows.

Wednesday morning (a group of 36 participants from widely divergent backgrounds and experience)

Being a larger group, this group provided more diverse comments, both positive and negative. Key among the 'brickbats' were a lack of time to explore the issues in more detail, a lack of sufficient use of real life case studies (other than in tax discussion), a desire for more detailed exploration of both tax and liability issues, and concerns from those who started with limited knowledge of stewardship that they needed more background information prior to the workshop. ‘Bouquets’ were primarily in the areas of coverage of complex issues, opportunities for interactive process and learning from the experiences of others, the balance of presentation and participation, and the section presented by Greg Blake on tax and liability issues.

Friday morning (a small group of 12 participants, several from on-ground coordination/‘extension’ positions – several registrants did not attend)

Several commented that they had no ‘brickbat’ contributions, while others commented on trying to cover too much in the time available, duplication with content of other workshops, and lack of new material. The ‘bouquets’ focused on facilitation and organisation of the workshop and the written material provided, the dynamic and interactive nature of the session enabling good participation, and the focus on solutions.

Friday afternoon (22 people, more from government agencies than in previous groups) The ‘brickbats’ focused on lack of adequate time/space to develop ideas through discussion, and a lack of diversity of state/territory representation and views. Several participants in this group expressed a need for a longer workshop on these issues. ‘Bouquets’ from this groups focused on the interactive structure and opportunities for participant input, good structure (mix of whole group and small table work) and facilitation, flexibility of the program and the information provided in sessions on tax and risk, as well as the work book provided.

Facilitation team comment

These workshops demonstrated a real need for more opportunities to undertake training in this area. A number of participants commented that they would benefit from one day training. Such training could be amalgamated with the “Collaboration” workshop (which was provided by Community Solutions and Mike Williams) which also suffered from a lack of time, into a 1.5-2 day training workshop on Collaboration, Building Partnerships and Stewardship.

Attachment 1: Individual actions to improve stewardship (sorted by theme)

Try to normalise 'stewardship'
Clarify understandings between different parties of 'stewardship', 'Best Practice', Duty of Care' etc
Communicate issues identified by stewardship groups to Australian Government policy-makers and those who deliver programs
Apply lessons from others' experiences to current Commonwealth incentive programs
Try to include professional agreements in policy documents and discussions
Work for effective legislation stimulating interest in incentives
Commencing an arrangement for land & wildlife between DCC, DIPNR and DEC
Push for & support coordinated delivery within CMAs and with head office
Talk with other people within my department and in other departments
Lobby for biodiversity production payments to be conditional on other stewardship areas
Lobby for large national biodiversity fund to pay for biodiversity production
Create greater Local Government support e.g. rate rebate schemes
Appropriate planning
Clarify specific responsibilities & outcomes of those involved
Ensure shared clear goals
Make sure objectives are clearly understood by all parties
Clearly define roles & responsibilities within agreements
Develop a decent stewardship contract – work on partnerships
Ensure that legal, tax and liability issues are considered in planning the program (This is the single biggest disincentive for land managers to get involved with incentives)
Get input from qualified sources for different aspects of the Trust program (e.g. tax)
Clarify the relationships between payments for goods & services and what eco-services or public goods are being paid for
Recognise the differences between grants and payments
Consider the wider implications of incentives e.g. tax thresholds
Recognise that incentives are not just about transferring money from one source to another – the complexities of tax laws etc.
Recognise that tax and liability issues are complex, need to be considered, and need expert advice
Raise awareness of complicated tax issues surrounding covenants/stewardship
Talk about tax implications
Need to communicate tax issues and possible impacts
Refer tax matters to professional when unsure
Get more products on tax
Try to work out solutions to local problems that use local inputs and local opportunities
Encourage partnerships with on-ground delivery programs
Encourage partnership with CVA,CMA to improve weed management
Develop meaningful partnerships to develop and implement stewardship programs
Develop a better understanding of the psychology of stewardship
Social research
Write my Honours thesis on barriers to farmer adoption – take account of social and personal context and norms
Develop a holistic picture in which Indigenous people are recognized and participate
Develop a tender scheme that is flexible in design to account for a range of participants and needs
Allow for the cultural/perception differences in our concept of stewardship
Take into account people's cultural differences when approaching them or communicating

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Making the issue of stewardship more important to landholders
Raise awareness of the need for stewardship arrangements
Market stewardship to the non-believers
Promote the notion that stewardship goes beyond Duty of Care
Break the ignorance barrier about Nature on Farms –work with ag. Corporations e.g. Dairy, grains, Farmers & Graziers Assoc.
Recognise the breadth of stewardship and make all the tools available
Facilitate a more complete suite of incentive tools
Investigaee eco real estate as a motivator
Get funds into the Trust for Nature Foundation
Offering more funds for covenants
Make a list of stakeholders with ideas for likely incentives for partnerships – work with Parks Vic
Communicate with partners
Visit Bush Bank SA covenant holders and place 'stewardship' on their Management Committee agenda
Develop a partnership between WWF and SWCC
Organise a day for new owners to present management kits
Promote the availability of stewardship payments
Encourage other schemes to pay for management
Communicate and support stakeholders and regions to plan better and to take hold of opportunities to progress 'stewardship'
Create a support network for stewards - both rural and urban
Expand support networks
Provide education on Land for Wildlife programs for community
Start a project newsletter
Newsletter
Get out & talk with people
1-day per month follow-up with phone call or visit
Visit land owners and identify local champions
Establishing a community leaders/mentoring scheme
Fill the knowledge gaps to achieve long-term stewardship
Increase availability & continuity of extension staff and other mentors to provide ongoing support
Get extra support for extension staff – provide stewardship information and tools
Increase staffing capacity
Get the advice networks skilled up
Prioritise landholders and land needs for stewardship
Improving early dcumentation
Develop processes to monitor change and adopt it into the program
Develop long-term monitoring at shorter intervals
Review record keeping and baseline information
Consider ongoing self-evaluation of stewardship –link with EBMP, EMSs, Flockcare etc
Establish ongoing peer review of processes we are using – case studies
Use case studies to encourage others to be stewards
Recognise the need for some blue sky approaches
Get started