

# **Conservation Project Management: Aligning Expectations with Reality**

**Delivering Great Service While  
Maintaining Your Role**



# The Blurry Line



## The Challenge

*As private lands biologists, we're both experts and advocates for the land.*

*However, our role often gets confused with project management responsibility.*

*This leads to:*

- *Misunderstandings about who handles what*
- *Frustration on both sides*
- *Potential burnout for staff*

# Our Role, Their Goal

1

## You (The Biologist): The Technical Guide

- *Provide scientific and practical advice*
- *Connect landowners to appropriate resources*
- *Develop initial project plans and maps*
- *Offer technical expertise throughout the process*

2

## The Landowner: The Project Leader

- *Owens the final decisions*
- *Responsible for funding applications*
- *Manages project implementation*
- *Coordinates with contractors directly*



# Walk a Mile in Their Boots

## Empathy is Key

*Why do landowners want you to take the lead?*

- 1 They are busy and often overwhelmed by the conservation process*
- 2 Technical terminology and regulations create confusion*
- 3 They see you as a trusted expert who understands the system*

*This isn't a conflict—it's an opportunity to build stronger partnerships through clear communication*



# The Communication Compass

*Deliver excellent customer service while proactively setting boundaries*



Start with the end in mind  
*Set expectations during the initial call*



***Instead of “I understand you have hog issues, we need to get those caught,” say:***



Solidify roles during the site visit  
*Use the physical space to clarify responsibilities*

***“There is help from the USDA and state programs to help you remove your hog issue. I can send you some application information and contact numbers so that you can work on acquiring a trap.”***



Leverage your deliverables  
*Use maps and plans as tools for clarity*



Follow up for understanding  
*Gauge interest and understanding, not to manage tasks*

# First Contact: The Blueprint Call

## Initial Phone Call Strategy

*Start Here: Outline the entire process from start to finish*

*Use Specific Language:*

📄 ***Instead of "I'll help you with this project," say:***  
***"My role is to provide a plan and resources to help you apply for funding. You'll be the one to submit the application and oversee the work."***

***Establish Timeline: Be clear about when your deliverables will arrive and what happens afterward***





# On the Ground: Solidifying the Scope

## The Site Visit

### Reiterate and Confirm

*Use the physical space to confirm roles:*

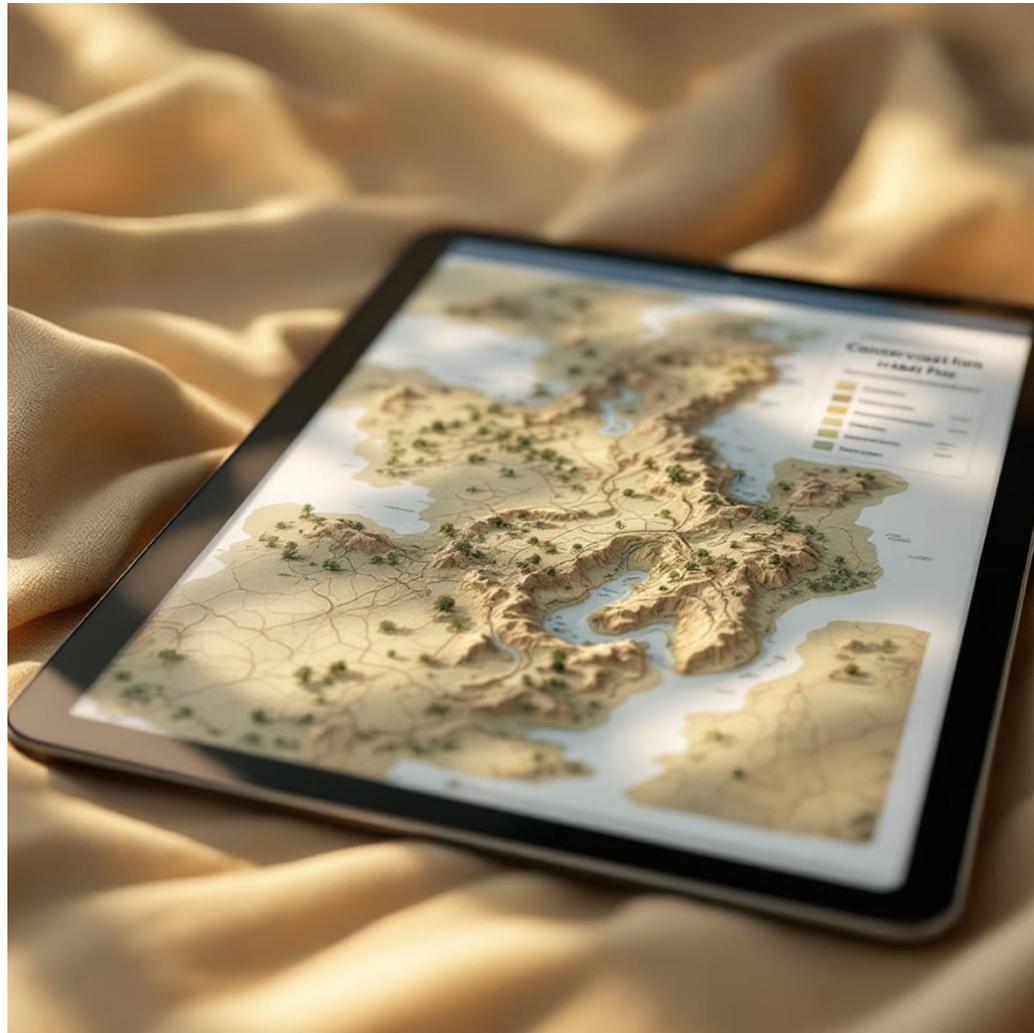
*"Based on what we've discussed, my next step is to create a map and technical plan. From there, you will have the information you need to move forward with the funding sources and management actions needed to meet your goals."*

### End With Clarity

*Conclude the visit with a single, clear action item for both parties:*

- *Your commitment: "I'll send you the habitat plan by Friday."*
- *Their next step: "Once you receive it, you'll need to review and submit an application or hit the ground running with implementation."*

# The Official Hand-off



## The Email and Plan

*Your map and plan are formal documents, not just casual emails.*

## Add a "Next Steps" Section

- *Review the plan and map*
- *Contact the XYZ funding agency*
- *Submit your application by [date]*
- *Schedule contractor visits*

*Clearly outline the landowner's responsibilities in a professional format*



# Checking In, Not Taking Over

## The Follow-up Call

### Gauge Comprehension

*The follow-up is for clarity, not project management:*

*"I'm calling to see if you had any questions on the map or the next steps section. Is there anything in there that is unclear?"*

### Offer Support, Not Management

*If they ask you to do a task:*

✔ *"I can point you to the right resource for that. The agency contact is [name] at [phone/email]."*

✘ *Avoid: "Sure, I'll call the agency for you."*

# Key Takeaways



## Communicate Early & Often

*Set expectations from the very first interaction and reinforce them at each touchpoint*



## Be Proactive, Not Reactive

*Establish boundaries before issues arise rather than addressing confusion later*



## Deliverables Are Communication Tools

*Your maps and plans should clearly guide landowners on their next steps*



## Empower the Landowner

*By clarifying roles with empathy, we build stronger partnerships that lead to successful conservation projects*



# The Partnership Pays Off

*By defining our roles with clarity and empathy, we don't just protect our own time and sanity. We build stronger, more effective relationships that lead to successful conservation projects and happier, more confident landowners.*

*When we work together and respect each other's roles, everybody wins - including the ecosystems we're working to restore.*





# Thank You

*What questions do you have about building effective landowner partnerships?*