

**BIRD STUDIES CANADA**  
**STRATEGIC PLAN, 2003-2007**

**INTRODUCTION**

For nearly four decades, Bird Studies Canada (BSC), formerly known as the Long Point Bird Observatory (LPBO), has marshaled thousands of volunteers for bird studies. It now draws over 20,000 volunteers annually, who actively participate in local, regional, national and international programs of research and education in support of bird conservation. In response to this growth of interest and commitment, BSC entered a new phase of its history when it obtained revised Supplementary Letters Patent in April 1998, and adopted a new constitution (By-Law Number 1).

Since the first strategic plan document was completed in 1999, much has been accomplished toward its strategic intents and objectives. The Board of Directors and members of the National Science Advisory Council represent many regions of Canada. Field staff members are present in British Columbia, the Prairie Provinces, Ontario, Québec, and the Atlantic Provinces. Fund-raising for the new national research centre and headquarters was successful, with the grand opening celebration held in June 2002. Through the North American Bird Conservation Initiative, Bird Studies Canada has taken an increasing role in bird science and conservation issues throughout Canada and the continent, and BSC and the Canadian Nature Federation renewed their partnership agreement in BirdLife International.

The future brings new opportunities along with challenges and risks. It requires BSC to adapt and innovate. The strategic plan (and the planning processes that led to it) identifies key directions and actions that provide focus and a practical framework for directing the work that lies ahead. "Strategic" activities are those needed to secure the long-term viability and effectiveness of the organization and its programs. The plan provides a context for the periodic re-setting of priorities, and for developing business plans, a communications program and other measures to achieve them.

**MISSION**

**The mission of Bird Studies Canada is to advance the understanding, appreciation and conservation of wild birds and their habitats, in Canada and elsewhere, through studies and programs that engage the skills, enthusiasm and support of its members, volunteers, staff and the public.**

BSC's mission statement guides everything it does from the focus of its programs to the allocation of resources, and the reporting of results.

The mission will be achieved by:

- \* Drawing upon a broad base of volunteers, working collaboratively with partners and complementing the activities of others engaged in related research, conservation, and education;
- \* Having BSC's program advisors (National Science Advisory Council and its regional program sub-committees, and Long Point Bird Observatory Committee) keep abreast of needs and opportunities, help monitor the effectiveness of on-going programs and projects, and assess the feasibility of developing new initiatives having clear scientific and conservation goals;
- \* Conducting intensive and extensive monitoring programs and studies of wild birds and their habitats, with high scientific and ethical standards, throughout Canada and elsewhere;
- \* Analyzing and interpreting data and other information from research and monitoring for use by conservation agencies and organizations;
- \* Sharing the results in a wide variety of formats for different audiences including the public, scientists, decision makers, other organizations and the media; and
- \* Conducting education and training activities that are focused on BSC's strengths in field studies of wild birds and their habitats.

## **VISION**

**Bird Studies Canada will be recognized and respected nation-wide as the leading not-for-profit conservation organization dedicated to the study, understanding and conservation of wild birds and their habitats.**

The "vision" declares the organization's aspirations, and identifies what it is striving to become in the years ahead. It draws upon the values and commitments that underlie the organization's existence, and provides guidance for dealing with essential matters arising from day-to-day events and preoccupations.

This vision will have been achieved when BSC is widely accepted by others to be:

- \* A respected not-for-profit organization dedicated to the scientific understanding of birds and factors associated with bird conservation in all regions of Canada and internationally;
- \* A recognized source of credible scientific and practical information on wild birds and their habitats in Canada for use by scientists, conservation organizations, governments and the public;
- \* A reliable partner that delivers on its commitments and respects other partners' needs;
- \* A trustworthy, responsible member of the conservation and scientific communities in Canadian and international circles; and
- \* A strong, professional organization that offers participants satisfying, enjoyable and effective programs.

## VALUES

The expression of values reflects widely held beliefs among people associated with an organization. Together, beliefs and values constitute the essence of organizational culture, providing motivation, stability, and direction, especially in times of stress and change.

### Excellence in Science

BSC strives for excellence and innovation in all of its science-based programs. To make a difference, BSC must be respected for the quality of its science and its ability to interpret scientific knowledge in ways that others can apply to conservation actions. In working to strengthen the scientific base for the conservation of wild birds and their habitats, BSC will acknowledge gaps in knowledge, and consider the overall weight-of-evidence from its interpretation of scientific knowledge, the available data, and other information.

### Engaging the Public

BSC believes that informed amateurs and volunteers have important roles to play in the study of wild birds and their habitats. Not only can volunteers collect more data from more places than professionals can ever do on their own, they can help BSC improve the design of programs by learning from their experience. The rich rewards for those who participate in nature study often lead to a lifetime commitment to conservation. Commitment, creativity and constant care are required if future generations are to inherit and enjoy a biologically rich and diverse world in which wild birds enrich people's lives.

### Achieving Conservation

Bird conservation depends on the public at large, especially landowners and resource managers, having a conservation ethic. BSC's role -- to educate and to

inform people with reliable data, analyses, and interpretations of information so that responsible stewardship decisions are made -- will make a substantial contribution to regional, national and global habitat protection and avian conservation.

#### Respect for Birds and Nature

BSC respects birds and nature and strives for better understanding of them. BSC believes that wild birds and the habitats that sustain them have values beyond their immediate or practical value to humans. While bird populations can be indicators of changes in environmental conditions, many people appreciate birds for aesthetic reasons. For others, birds open up an understanding of the natural world. The study of wild birds, including all facets of their biology, is fascinating in itself. BSC will share the joy and fascination of working with wild birds with others.

#### Respect for BSC's Own Heritage

Long Point, an area of outstanding natural significance, is the historic home of BSC. The decades long investment in research, monitoring and education activities in this area provides both substance and credibility for BSC's work. Long Point Bird Observatory programs, volunteers and supporters are valued sources of tradition, inspiration, and support. LPBO's work will be continued.

### **PRINCIPLES**

The following principles, based on BSC's fundamental values, are rules of conduct and standards that guide decisions about the organization, its programs, and resource allocation.

#### Integrity and Professionalism

The responsibility and trust placed in BSC by supporters, volunteers, partners, and the public must be earned every day. BSC will exercise the highest ethical and professional standards in all of its endeavours, provide self-evaluation and solicit feedback on progress, and be held accountable for results. The "advocacy" of BSC's commitment to bird conservation is sometimes undertaken by applying the results of its science directly, but usually by providing its information to others who use it constructively for conservation. BSC is committed to making its databases and results from field studies available for wide use. Precautionary principles are considered essential to scientific considerations.

#### Commitment to People

Success in achieving a vision and mission depends critically upon the people who work for and with BSC. An organizational culture must be maintained that encourages individuals to achieve their potential, values and acknowledges their contributions, and provides opportunities to improve personal skills and knowledge through training and education. BSC has a special responsibility to organize a range of volunteer surveys and activities, appropriate to various levels

of expertise, and to provide timely and engaging feedback. BSC's special strength is the contribution volunteers make to conservation through their fieldwork.

#### Innovation and Resourcefulness

To accomplish all that BSC must do requires vision, resourcefulness, a responsible entrepreneurial spirit, and adaptability to change. A high degree of technical and professional competence will be brought to bear in all areas of BSC's work. Innovative ideas leading to practical applications grounded in credible knowledge and experience are encouraged.

#### Commitment to Partnerships

BSC conducts its work through constructive and productive partnerships, based on mutual benefit and trust. It knows that success comes only through these combined efforts. It will help develop and nurture regional, national and international initiatives that meet BSC's priorities, and collaborate with a wide variety of individuals, foundations, corporations, conservation organizations, government agencies and other interested parties. BSC recognizes the value of partnerships and will enter into agreements with federal, provincial or territorial governments as needed, as well as with other bird conservation agencies with which we have a shared common vision. BSC will fully acknowledge the contributions of those partners.

#### Commitment to Local, National, and International Perspectives

Existing collaborative arrangements for the study and conservation of birds found in Canada range across all geographic scales from the local through national to the continental and international. They also have varying degrees of inclusiveness, ranging from a concentration on selected groups of birds to all birds found within some geographic region. BSC will work constructively in collaborative arrangements where it can help make a difference. It will strive to reach across these boundaries of scale and inclusiveness in order to bring perspectives from within each to bear on the work of all.

### **PARTICULAR STRENGTHS, OPPORTUNITIES AND CHALLENGES**

The strategic planning process identified the following significant factors as BSC strives to fulfill its mission and vision.

#### Strengths

Important strengths include:

- \* Established credibility among agencies and conservation organizations in Canada as a non-government organization that conducts research and monitoring of birds and their habitats, and has a proven ability to deliver satisfying and enjoyable programs that attract volunteers;

- \* Cross-Canada presence through regional offices and representation on the Board of Directors and National Science Advisory Council from most parts of Canada;
- \* Databases and state-of-the-art database management systems and analysis capabilities, other information, and experience resulting from over 40 years work based at the Long Point Bird Observatory;
- \* Production of diversified and high quality reports, information materials, and Web site content and links;
- \* Solid core of loyal supporters and active volunteers, and organizational skills in managing volunteer-based programs; and
- \* Capable and talented staff that provides strength, continuity, and a base for expanded activities.

#### Opportunities for BSC

Important opportunities include:

- \* Established interest in providing volunteer-based programs and information in all regions of Canada;
- \* Programs already developed in only one or two regions that could be readily applied in other regions, or nationally, resulting in more data and added effectiveness from consistent and comprehensive data and analysis;
- \* Position of experience in developing new cost-effective ways of gathering data, including volunteer-based initiatives, that is of particular interest to government and other research organizations at a time of budget constraints;
- \* Potential to draw upon the growing number of recreational “birders” at a time when human demographics also suggest a growing pool of potential and interested volunteers (and donors);
- \* Ability to attract and engage younger generations in various bird-related activities to become the next generation of volunteers and scientists.
- \* Experience in using birds as “indicators” to monitor environmental trends and the results of conservation measures at a time of growing interest in biodiversity and habitat conservation; and

- \* Growing pool of ornithological expertise that can be “contracted” by government and non-government organisations to address issues related to bird science and conservation.

### Challenges for BSC

Important challenges to be faced include:

- \* Lack of recognition or image associated with a new name, and a tradition that is not well known by the general public;
- \* Limited time to demonstrate that BSC is a “national organization” capable of providing added value, useful programs, and information in all regions to meet important regional and national needs;
- \* Need to acquire and maintain the necessary staff and management capacity to establish a regional presence, deliver more programs in more regions, and increase the scientific output of the organization;
- \* Need to develop the capacity to work effectively in French, especially in Québec and New Brunswick;
- \* Need to develop the capacity to work in Spanish effectively within the Americas; and
- \* Need to develop the funding and supporter base for programs regionally and nationally.

### **BSC’s STRATEGIC INTENTS AND OBJECTIVES FOR 2003-2007**

A strategic intent identifies a major direction for organizational efforts. Objectives specify some achievement points along the way that will serve as measures of success. BSC has chosen the following five strategic intents to enhance organizational capabilities and programs.

#### **First Strategic Intent: Develop effective national and regional programs consistent with BSC’s mission, and covering all bird species.**

Issues: How should BSC best build upon national programs already underway and develop stronger regional volunteer participation in them? What new national and regional programs should BSC initiate? How should BSC give enhanced and tangible evidence of a Canada-wide presence to demonstrate its national reality and capacity?

### Objectives and Actions

1. Build a BSC presence in all regions.

Have a minimum of one full-time-equivalent staff in each region of Canada, or equivalent program implementation agreements with appropriate regional organizations.

Provide grants to individuals or groups for activities that increase knowledge of Canadian birds, or contribute to their conservation.

Develop new regional programs where appropriate to advance BSC's mission.

Define and develop terms of reference for other expressions of "presence," e.g. roles of Board members, research associates and special volunteers.

Hold regional and national meetings with provincial and national organizations and local groups to develop shared interests and support.

Work to provide full services in both French and English, and begin to develop a Spanish-speaking capacity.

2. Maintain numbers of volunteers for BSC's national programs that are proportional to population distribution in Canada.

3. Continue to develop strategic approaches and implementation of guidelines consistent with the use of the Integrated Population Approach as a framework for BSC programs (see Appendix 1).

4. Coordinate the development of the Canadian Migration Monitoring Network in partnership with the Canadian Wildlife Service.

Develop partnership agreement with CWS regarding the Canadian Migration Monitoring Network.

Convene annual or biennial meetings of network members.

Provide data management services and regular trend analyses for network members.

Seek sources of support for the network and member stations.

5. Continue the Important Bird Areas project in partnership with the Canadian Nature Federation and BirdLife International.

Complete the documentation of IBA sites and develop follow-up monitoring of species and habitats for priority areas.

Explore joint activities with the CNF and others to secure recognition for critical IBAs in the breeding, staging and wintering areas of Canadian breeding birds. Use information to facilitate and contribute to the development of marine and terrestrial protected areas.

6. Design and initiate new high priority national programs (or components of them).

Coordinate the design and development of national monitoring protocols in cooperation with partner organizations, e.g. for marsh monitoring, owl surveys, and checklist programs.

7. Continue to take a significant role in assessment, planning and recovery actions for selected endangered and threatened species.

8. Maintain other national and regional programs.

Develop evaluation criteria for scientific reviews of on-going programs, including criteria for dropping programs that have served their purpose or are no longer effective.

Develop and implement a boreal bird program.

9. Establish BSC as an advocate and a leader in the application of science to the conservation of wild birds and their habitats.

Provide input to land management plans and policy directives, such as the establishment of terrestrial and marine protected areas, through the appropriate use of the results of BSC monitoring programs and staff expertise.

Contribute BSC information, expertise and GIS approaches to landscape-scale biodiversity and conservation planning exercises.

**Second Strategic Intent: Play an enhanced constructive role in bird and habitat conservation initiatives regionally and nationally, and on an international basis where we share bird populations with other countries.**

Issues: How can BSC maximize the conservation significance of its work? How can BSC play a stronger role in addressing emerging conservation issues, such as deforestation and marine oil pollution?

Objectives and Actions

1. Contribute to the North American Bird Conservation Initiative (NABCI).

Participate as a full member of NABCI Council on an ongoing basis.

Participate in the working groups of NABCI Canada, such as waterbirds, shorebirds, and landbirds, in order to influence priorities and to stimulate implementation of bird and habitat conservation.

Develop partnerships with other organizations for comprehensive coverage of all bird species, consistent with the intent of the North American Bird Conservation Initiative (NABCI).

Develop other areas of scientific expertise to strengthen application of the Integrated Population Approach within collaborative endeavours of the NABCI.

Continue to influence the Canadian landbird conservation strategy, with particular reference to migration monitoring components.

2. Continue to represent Canada in BirdLife International, as Co-partner with the Canadian Nature Federation.

Implement the actions contained in the 2002 joint workplan with CNF, for BirdLife activities within the western hemisphere.

Provide technical and scientific leadership for Canada in BirdLife issues.

Work to develop the capacity of the BirdLife International Americas partnership.

3. Collaborate in conservation programs where appropriate and where complementary to BSC's mandate.

Participate as a member of Committee on the Status of Endangered Wildlife in Canada (COSEWIC).

Develop enabling agreements with other bird conservation science agencies to permit collaborative science activities and resource sharing.

Be recognized nationally as a lead organization specializing in the scientific study and conservation of birds and their habitats.

### **Third Strategic Intent: Maintain a National Centre for Bird Studies at Long Point.**

Issues: BSC has a new headquarters in Port Rowan that will enable it to build its capacity as a national organization, and maintain and develop LPBO as a model operation. How should BSC integrate its local programs with central expertise required for national and regional programs? How can BSC use the cooperative agreements and close working relationships it has with other bird conservation organizations to develop a national centre for bird studies? What expertise and infrastructure are needed to create this national centre?

#### Objectives and Actions

1. Develop a marketing and visitation strategy for the national research centre in order to capitalize on the large number of visitors expected and to increase awareness of the organization and bird science and conservation programs.

2. Develop core expertise for the organization.

Hire and train BSC staff to deliver population studies design, data analysis and volunteer coordination.

Ensure that the appropriate science capacity is in place to meet regional, national and international commitments.

Attract university-based expertise to BSC through adjunct faculty, post-doctoral fellow and graduate student arrangements.

Identify partnership requirements to complement BSC's expertise with national and international groups, e.g. Society of Canadian Ornithologists.

3. Develop and manage a national data centre for bird studies.

Continue to build and maintain the national database system using appropriate technology, so that data from BSC and partners can be readily accessed, analyzed and distributed.

Build partnerships with other organizations gathering data on Canadian birds (e.g. Canadian Wildlife Service, Cornell Laboratory of Ornithology, USGS/Biological Survey) to allow for sharing of bird population data and joint delivery of programs as appropriate.

Develop additional expertise to analyze and disseminate results from the data being gathered by BSC and partners.

4. Develop LPBO as a model bird observatory.

Maintain LPBO programs and consider new ones consistent with the scientific evaluation criteria adopted by BSC for assessments of programs.

Recruit a senior scientist for migration studies, and related programs.

5. Provide administrative support and direction for the programs and staff of the Long Point Waterfowl and Wetlands Research Fund.

6. Continue and enhance training activities for participants in bird studies.

Maintain and enhance the Latin American Training program.

Maintain the annual Young Ornithologists Workshop and other local training activities.

Consider other approaches to help build future generations of trained personnel.

7. Ensure results of scientific studies are communicated as appropriate.

Promote citizen science to program participants.

Publish study results in scientific journals.

Publish popularized versions of science results in public literature.

**Fourth Strategic Intent: Develop BSC's outreach capacity to achieve its vision and mission.**

Issues: How can BSC develop and maintain effective Canada-wide operations, with discretionary funding as a major basis for program support, and develop or initiate national and regional priority programs?

Objectives and Actions

1. Develop and implement a professional approach to fund-raising, including enhancing development capacity at staff and Board levels, and significantly increase organizational funding by 2007.
2. Develop and implement a comprehensive and integrated marketing and communications program.

3. Increase activities that lead to enhanced public awareness.

**Fifth Strategic Intent:** Develop a revised governance structure that is appropriate for a national conservation organisation.

Objectives and Actions

1. Develop a Board of Directors and governance structure that reflects a strong Canada-wide commitment.

Develop and implement a general business plan that outlines the governance structure for BSC.

Ensure that members of the Board and its committees effectively represent all regions of Canada, and provide the necessary range of committed individuals with superior qualifications in appropriate fields of expertise.

2. Identify clear roles and responsibilities for the Board and its committees, and encourage excellence in the performance of their members.

Review and revise the terms of reference for the Board, and specify those matters that require approval from either the Board or BSC management.

Clarify the role of the National Science Advisory Council and its sub-committees.

Review the roles of all BSC program advisory bodies, and consider integrating them within the general mandate of the National Science Advisory Council.

Conduct informal annual reviews of the effectiveness of the Board and its committees.

3. Develop guidelines for the governance of regional programs.

Review current approaches followed within BSC regional offices, with a view to developing consistent guidelines with sufficient flexibility to reflect regional differences.

Develop a mechanism for effective coordination and a reporting structure for regional programs, as part of an integrated national program.

4. Ensure that all BSC activities are consistent with the Mission, Vision, Values, Strategic Intents and Objectives of this Strategic Plan.

Make the Strategic Plan widely available to BSC staff, volunteers and partners, and provide periodic opportunities to review activities against its key components.

### **NEXT STEPS**

BSC will develop annual work plans to specify particular objectives and actions to be taken in accordance with the broad directions laid out in this Strategic Plan. While the strategic intents will remain in place for a number of years, the objectives will be reviewed annually and up-dated periodically. Priorities for actions will be determined in the light of recent accomplishments and opportunities to achieve specific objectives.

## **Appendix 1**

The Integrated Population Approach is a 5-step program that is designed to identify:

- 1) species where the weight-of-evidence points to serious population declines;
- 2) stages in their life cycles and time of year that are associated with these changes (e.g. production of young, adult mortality; breeding season, wintering season, or migration);
- 3) the human or other causes of these changes;
- 4) remedial or conservation measures; and
- 5) agencies and other organizations that can take appropriate actions.

The Integrated Population Approach is adapted from British Trust for Ornithology's integrated population monitoring program. For more information see: Baillie, S.R. 1990. Integrated population monitoring of breeding birds in Britain and Ireland. *Ibis* 132: 151-166.

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