

Site-level tool for identifying other effective area-based conservation measures (OECMs)

IUCN WORLD COMMISSION ON PROTECTED AREAS

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Feedback on use and suggestions for improvement are welcome and should be sent to:
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INTRODUCTION

This site-level assessment tool enables users to **determine if an individual site qualifies as an 'other effective area-based conservation measure' (OECM)** by assessing it against the CBD definition and criteria (CBD decision 14/8) and IUCN guidance. The tool is an annex to the IUCN-WCPA Technical Report on OECMs (see key references, below), which includes definitions and explanations of how the CBD criteria are linked to the criteria in this tool.

The assessment tool consists of three steps. Step 1 and 2 can be carried out in any order, or combined. Step 1 and 2 should be completed before step 3 is implemented.

- **Step 1: Screening** uses basic information on a site to determine if it is a potential OECM
- **Step 2: Consent** confirms that the governing authority and other rights-holders have agreed to the assessment going ahead
- **Step 3: Full assessment** uses further criteria to confirm that the site meets the definition of an OECM

The assessment tool may be used by the site's governing authority, rights-holders or any other stakeholder with knowledge of a site. Screening (step 1) may be carried out as a desk exercise. Consent for full assessment (step 2) must be freely given by the governing authority, Indigenous peoples and local communities who use, claim or own the site, and other important rights-holders, before the full assessment process (step 3) can be conducted. The full assessment should involve consultation with relevant stakeholders and experts, for example through an assessment group and stakeholder workshops.

Key **references** for further information:

1. CBD Decision on protected areas and other effective area-based conservation measures (see in particular paragraph 2 and Annex III). <http://www.cbd.int/doc/decisions/cop-14/cop-14-dec-08-en.pdf>
2. IUCN-WCPA (2019) *Recognising and reporting other effective area-based conservation measures*. Gland, Switzerland: IUCN Protected Area Technical Report Series no 3. This tool is an annex to the technical report. <https://www.iucn.org/commissions/world-commission-protected-areas/our-work/oecms/oecm-guidelines-and-reports>
3. UNEP-WCMC (2019). User Manual for the World Database on Protected Areas and world database on other effective area-based conservation measures: 1.6. UNEP-WCMC: Cambridge, UK. http://wcmc.io/WDPA_Manual
4. Further information and training materials are available on the WCPA OECM Specialist Group website, <https://www.iucn.org/commissions/world-commission-protected-areas/our-work/oecms>

STEP 1: SCREENING: IDENTIFYING A POTENTIAL OECM

1.1. PURPOSE

Step 1 records basic information and allows rapid assessment of a site to determine if it qualifies as a *potential OECM* through two screening criteria. To qualify, a site must score 'yes' for both screening criteria.

1.2 INFORMATION NEEDED

Basic information on the site can be recorded using the following table:

Information required	Site data
Site name: <ul style="list-style-type: none"> Site name in local language(s) Site name in English 	
Site location: <ul style="list-style-type: none"> Country where site is located Sub-national administrative division(s) Other description of location (e.g. name of a river, mountain, area) 	
Site designation: <ul style="list-style-type: none"> List any national or local designation, e.g., protected forest, sacred site List any international designation linked to the site's biodiversity value 	
Governance or management of the site: <ul style="list-style-type: none"> List the main stakeholders known to be involved in the governance and management and use of the site, including government, private sector and community or others 	
Organisations/groups or individuals carrying out the screening process: <ul style="list-style-type: none"> Name, address and contact details 	
Date of the screening	
Main biodiversity value(s): <ul style="list-style-type: none"> List the main important biodiversity values of the site (see criterion 2 for list) 	

1.3 SCREENING ASSESSMENT

TEST	QUESTIONS	RESPONSE	JUSTIFICATION
<p>Criterion 1: The site is <u>not</u> a protected area (PA)</p>	<p>Is the site fully OUTSIDE any protected area currently recognised by national government?</p>	<p><input type="checkbox"/> Yes (site is <u>not</u> a recognised PA and does not overlap with a recognised PA)</p> <p><input type="checkbox"/> No (site <u>is</u> a recognised PA or overlaps with a recognised PA)</p>	<p><i>briefly summarise the information that supports the response given</i></p>
<p>Guidance on Criterion 1</p> <p><i>The definition, recognition and reporting of protected areas depends on national governments and will vary from country to country. Therefore:</i></p> <ul style="list-style-type: none"> <i>If a site is NOT recognised by a national government as a protected area (PA), then it may be a potential OECM.</i> <i>If a site partially overlaps with a protected area recognised by national government, then the part of the site <u>outside</u> the PA may be a potential OECM.</i> <i>Private protected areas, territories and areas conserved by Indigenous peoples and local communities and protected areas declared by other authorities (e.g. sub-national governments) may be potential OECMs if they are NOT recognised by national government as protected areas.</i> <i>If a site meets the IUCN definition of a protected area, but is not recognised as a protected area by national government, then it may be a potential OECM.</i> <i>If a site is a <u>proposed</u> protected area, but not yet designated by national government, then it may be a potential OECM.</i> <i>The recognition of a site as a PA or OECM can be updated in future to accommodate changes in status.</i> <p>Further information:</p> <ul style="list-style-type: none"> <i>Information may be available from national databases and documents (e.g. the National Biodiversity Strategy and Action Plan). Protected areas that have been reported to the World Database on Protected Areas (WDPA) are displayed on the Protected Planet website https://www.protectedplanet.net/en.</i> 			

TESTS	QUESTIONS	RESPONSES	JUSTIFICATION
<p>Criterion 2: The site is <i>likely</i> to support important biodiversity values</p>	<p>Does available information suggest that the site supports <u>at least one</u> of the following important biodiversity values?</p> <p>(a) rare, threatened or endangered species and ecosystems</p> <p>(b) natural ecosystems which are under-represented in protected area networks</p> <p>(c) high level of ecological integrity or intactness</p> <p>(d) significant populations of range restricted species or ecosystems</p> <p>(e) important species aggregations, such as spawning, breeding or feeding areas</p> <p>(f) importance for ecological connectivity, as part of a network of sites in a landscape or seascape</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>	<p><i>briefly summarise the information that supports the response given</i></p>
<p>Guidance on Criterion 2:</p> <ul style="list-style-type: none"> • <i>At this screening stage, the assessor should select ‘yes’ if there is a reasonable likelihood that the site supports important biodiversity values. Further evidence and expert opinion are used to confirm the presence of important biodiversity values, if necessary, during the full assessment (Step 3).</i> • <i>‘Reasonable likelihood’ means, for example, that there are reports of important biodiversity values, or analysis suggests that important biodiversity values are likely to be present, for example if satellite imagery shows suitable intact habitat within the range of a threatened species or ecosystem.</i> • <i>If a site is already recognised under an international biodiversity designation (for example, as a Key Biodiversity Area, or an Ecologically or Biologically Significant Marine Area) then it can be assumed to support important values and may be a potential OECM.</i> <p>Sites which meet the guidance under criterion 4 may be potential OECM</p> <p>Sources of biodiversity information are listed in the guidance for criterion 4</p>			

1.4. NEXT STEPS

- *If the response to both criteria is 'Yes', the site is a potential OECM.* The next step is to seek consent to carry out a full assessment (step 2), if this has not already been secured.
- *If the response to either of the criteria is 'No', the site is NOT a potential OECM.* The assessment does not proceed further, but see the guidance on re-assessment in Section 3.3.3.

STEP 2: CONSENT FOR FULL ASSESSMENT

2.1. PURPOSE

To ensure that the primary governing authority, Indigenous peoples, local communities, and other important rights-holders are aware of and agree to the full OECM assessment being implemented. If necessary, consent may be sought in two stages: consent for the assessment, and consent for the site to be recognised as an OECM, if it qualifies.

2.2. INFORMATION NEEDED

Information required	Site data
<p>Name of the primary governing authority and contact details</p> <ul style="list-style-type: none"> The primary governing authority has a recognised mandate to make decisions on the overall management and use of the site The authority may be government, regional inter-governmental organisations, private entities, Indigenous peoples, local communities, other groups, or a combination of these. 	
<p>Name of the management authority(ies) (if this is different from the primary governing authority) and contact details</p> <ul style="list-style-type: none"> The management authority may be government, regional intergovernmental organisation, private, Indigenous peoples, local communities, other groups or a combination of these. 	
<p>Name and contact details of any Indigenous peoples or local communities which claim ownership or rights over the site.</p>	
<p>Name and contact details of any other important rights-holders or stakeholders who are involved in the process.</p>	
<p>Record of the consultation process.</p> <ul style="list-style-type: none"> Dates and description of key meetings and other events in the assessment process Documentation of the participation and consent of governance and management authority(ies), Indigenous peoples, local communities, and other rights-holders, including any agreed conditions for the assessment. 	

2.3. SECURING AND DOCUMENTING CONSENT

If the organisation/group/individual leading the assessment is not the primary governing authority, then the primary governing authority's written consent to the full OECM assessment process must be obtained and documented.

If the site is used, owned or claimed by Indigenous peoples or local communities, then their free, prior and informed consent (FPIC) to the assessment process must be obtained and documented, with the involvement of legitimate representatives of the group. Other rights holders and stakeholders may also have the right to be consulted, in accordance with national and local regulations.

Documentation of consent must include any conditions agreed with the parties, such as specific requirements for participation, or review before finalisation.

Further resources on FPIC processes are available at <https://www.forestpeoples.org/en/lands-forests-territories-law-policy-global-finance-trade/training-tool/2017/resources-free-prior>.

2.4 NEXT STEPS

A potential OECM which has met the screening criteria (step 1) and where the primary governing authority(ies), any Indigenous peoples, local communities and important rights-holders have given consent for a full assessment to be carried out is referred to as a 'candidate OECM'. The candidate OECM should now be subject to a full assessment of the site against OECM criteria (step 3)

STEP 3: THE FULL ASSESSMENT: RECOGNISING AN OECM

3.1 IDENTIFICATION AND CONSERVATION OF THE BIODIVERSITY VALUE OF THE SITE

3.1.1 PURPOSE

The screening process (step 1, criterion 2) determined that the site is *likely* to have important biodiversity values. This step requires confirmation of all the important biodiversity values, based on available information. It also confirms that governance and management sustain these biodiversity values and that threats to the site are being addressed.

3.1.2 INFORMATION NEEDED

Information required	Site data
Boundary of the site: <ul style="list-style-type: none">• Describe how the boundary of the site is defined (for example, with reference to natural, customary, surveyed, or administrative boundaries)• Describe if the boundary is mapped and whether the map is publicly available• Describe if the boundary is demarcated	
Size and configuration: <ul style="list-style-type: none">• Note the area of the site, if known• Describe how the site's size and configuration is appropriate for the conservation of its important biodiversity values• Describe if the site is important because it connects other sites with important biodiversity values• Describe if the site is part of a network of sites which, together, support important biodiversity values	

<p>Confirmation of biodiversity values: Compile all available information which demonstrates that the site supports important biodiversity values (see criterion 4 for list of values), such as:</p> <ul style="list-style-type: none"> • credible reports from reliable sources, including relevant traditional knowledge • expert opinion from relevant experts 	
<p>Ecosystem services and cultural, spiritual and local economic values:</p> <ul style="list-style-type: none"> • List the other values of the site 	
<p>Threats:</p> <ul style="list-style-type: none"> • List any current or proposed activities which may threaten the biodiversity of the site • Describe to what extent the governance and management of the site is able to mitigate or prevent these activities from damaging the biodiversity values 	
<p>Long-term objectives and biodiversity value:</p> <ul style="list-style-type: none"> • Describe the long-term objectives for the site, as determined by the governing authority(ies) (for example: maintenance of water supply; sustainable production/extraction of wild products; preservation of spiritual values). • Describe how the long-term objectives for the site are linked to the conservation of the site's important biodiversity values 	
<p>Management actions and biodiversity values:</p> <ul style="list-style-type: none"> • Describe the main short-term management activities (for example, protection, harvest controls, restoration) • Describe how the management activities are linked to the conservation of the site's important biodiversity values 	

3.1.3 ASSESSMENT

TEST	QUESTIONS	RESPONSE	JUSTIFICATION
Criterion 3: The site is a geographically defined area	Does the site have clear boundaries?	<input type="checkbox"/> Yes <input type="checkbox"/> Uncertain or partially <input type="checkbox"/> No	<i>briefly summarise the information that supports the response given</i>
Guidance on criterion 3: <ul style="list-style-type: none"> • <i>A site can be defined by the limits of habitats, geographic features, customary boundaries or administrative limits.</i> • <i>A site can include land, freshwater and marine ecosystems in any combination.</i> • <i>A site's size and configuration should, as far as possible, be appropriate for managing and maintaining its important biodiversity values. It must be large enough to support viable populations of important species and to enable ecosystems to be self-sustaining, or it may be part of a larger mosaic of sites which meet this condition.</i> • <i>It is not necessary that the external boundaries of the site have been physically marked, but they should be mapped, where possible in digital form to allow submission of data to the World Database on OECMs (WD-OECM).</i> 			

TESTS	QUESTIONS	RESPONSES	JUSTIFICATION
<p>Criterion 4: The site is <u>confirmed</u> to support important biodiversity values</p>	<p>Does available information <u>confirm</u> that the site supports <u>at least one</u> of the following important biodiversity values?</p> <p>(a) rare, threatened or endangered species and ecosystems</p> <p>(b) natural ecosystems which are under-represented in protected area networks</p> <p>(c) high level of ecological integrity or intactness</p> <p>(d) significant populations of range restricted species or ecosystems</p> <p>(e) important species aggregations, such as spawning, breeding or feeding areas</p> <p>(f) importance for ecological connectivity, as part of a network of sites in a landscape or seascape</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> Uncertain or partially</p> <p><input type="checkbox"/> No</p>	<p><i>briefly summarise the information that supports the response given</i></p>
<p>Guidance on criterion 4:</p> <ul style="list-style-type: none"> • <i>Confirmation of important biodiversity values may be from credible reports from reliable sources including Indigenous and traditional knowledge holders, or the opinion of relevant experts documented as part of the assessment process.</i> • <i>If possible, the evidence documented should show that the site has the potential for in-situ conservation of viable populations and ecosystems.</i> • <i>A site where significant progress has already been made with restoring or reintroducing important biodiversity values may be an OECM.</i> • <i>A site with important biodiversity values which also has important ecosystem services and cultural/spiritual/economic values may be an OECM, where the governance and management of these other values does not negatively impact on biodiversity.</i> • <i>Important biodiversity values can be domesticated and cultivated species, where these are in their native habitats.</i> <p>Sources of information on biodiversity include the following (this is neither a compulsory nor an exhaustive list):</p> <ul style="list-style-type: none"> • <i>Further information on criteria for important diversity can be found in the IUCN-WCPA OECM Technical report, Box 4, page 7</i> • <i>Information on sites already listed as Key Biodiversity Areas is on the KBA data dashboard https://www.keybiodiversityareas.org/kba-data</i> 			

- Information on sites already listed as EBSAs is available at <https://www.cbd.int/ebsa/>
- Information on species classified as 'threatened' is on the IUCN Red List of Threatened Species <https://www.iucnredlist.org/>
- Information on ecosystems classified as 'threatened' is on the IUCN Red List of Threatened Ecosystems <https://www.iucn.org/theme/ecosystem-management/our-work/red-list-ecosystems>
- For sub-criteria (c, d and e), the criteria for Key Biodiversity Areas may be relevant <https://portals.iucn.org/library/sites/library/files/documents/2020-033-En.pdf>
- A searchable typology of ecosystems is available on the IUCN Global Ecosystem Typology website <https://global-ecosystems.org/>

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TEST	QUESTIONS	RESPONSE	JUSTIFICATION
Criterion 5: Activities which threaten the important biodiversity values of the site are prevented or mitigated	Does the governance and management of the site have the capacity and mandate to regulate activities which threaten the important biodiversity value?	<input type="checkbox"/> Yes <input type="checkbox"/> Uncertain or partially <input type="checkbox"/> No	<i>briefly summarise the information that supports the response given</i>
<p>Guidance on criterion 5:</p> <p>The following may be an OECM:</p> <ul style="list-style-type: none"> • <i>a site where management is addressing the threats;</i> • <i>a site where management has the capacity to address threats and there is a realistic probability that severe damage to the biodiversity value of the site will be avoided;</i> • <i>a site where legal means or other effective means (such as customary laws or binding agreements with landowners) to address threats are in place;</i> • <i>a site where sustainable traditional or low-impact management of natural resources is consistent with the conservation of important biodiversity values;</i> • <i>a site with no current or future severe threats identified.</i> <p>The following are unlikely to be OECM:</p> <ul style="list-style-type: none"> • <i>a site experiencing severe, immediate threats to its biodiversity value which cannot be addressed by management;</i> • <i>a site which is subject to environmentally damaging industrial-scale activities (such as industrial agriculture, fishing, forestry, mining, oil and gas extraction, and major infrastructure), whether the environmentally-damaging activities take place inside or outside the site (except areas set aside for long-term conservation within such sites). Note that sites under industrial-scale ‘sustainable management’ should be reported under the appropriate targets in the 2020 Global Biodiversity Framework – see the IUCN-WCPA OECM Technical Report p10, Box 6 and section 3.5.</i> 			

TEST	QUESTIONS	RESPONSE	JUSTIFICATION
Criterion 6. Governance and management of the site results in the <i>in situ</i> conservation of important biodiversity values	Does the governance and management of the site conserve the site's important biodiversity values?	<input type="checkbox"/> Yes <input type="checkbox"/> Uncertain or partially <input type="checkbox"/> No	<i>briefly summarise the information that supports the response given</i>
<p>Guidance on criterion 6:</p> <p>The following may be an OECM:</p> <ul style="list-style-type: none"> • <i>a site where management delivers effective biodiversity conservation even though conservation is not the primary objective (this may be 'secondary' or 'ancillary' conservation' – see the IUCN-WCPA Technical Report on OECMs, box 1);</i> • <i>a site which is permanently set-aside within an industrial concession/plantation for the purpose of conservation, as long as it is large enough (see guidance for criterion 3) to protect the important biodiversity values for which it is identified.</i> • <i>a site managed for a specific ecosystem service (for example, to maintain a watershed), <u>as long as</u> management for the ecosystem service does not negatively impact on important biodiversity values;</i> • <i>a site managed for its cultural, spiritual, socio-economic and other locally-recognised values and practices, <u>as long as</u> these practices and management do not negatively impact on important biodiversity values;</i> • <i>a site where management involves no intervention, but the site is protected (e.g., a military exclusion zone);</i> • <i>a site where significant progress has already been made with restoring or reintroducing important biodiversity values.</i> <p>The following are unlikely to be an OECM:</p> <ul style="list-style-type: none"> • <i>a site where management is focused on the conservation of a single species or group of species, unless this involves in situ conservation which also protects the wider ecosystem;</i> • <i>a site where restoration or reintroduction are planned, but where conservation outcomes have not yet been delivered</i> 			

3.2 ASSESSMENT OF SUSTAINED AND EQUITABLE GOVERNANCE AND MANAGEMENT

3.2.1. PURPOSE

This section addresses the level of sustainability and equity of the governance and management of the site

3.2.2. INFORMATION NEEDED

The governing authority(ies), Indigenous peoples, local communities, other rights-holders and other stakeholders were identified at step 2.

Information required	Site data
Long-term basis for governance and management: <ul style="list-style-type: none">• describe the legal or other recognised basis for long-term governance and management• describe any official designation (for example: military zone; protected watershed, Particularly Sensitive Sea Area, archaeological heritage site)	
Equitable governance: involvement of rights-holders: <ul style="list-style-type: none">• describe how the governing authority, Indigenous peoples, local communities, other rights-holders and other stakeholders (as identified in step 2) are involved in the governance and management arrangements	

3.2.3. ASSESSMENT

TEST	QUESTIONS	RESPONSE	JUSTIFICATION
Criterion 7. Governance and management arrangements are likely to be sustained	Do governance and management arrangements have a legal basis or other form of recognition and support which means that they are likely to continue in the long-term?	<input type="checkbox"/> Yes <input type="checkbox"/> Uncertain or partially <input type="checkbox"/> No	<i>briefly summarise the information that supports the response given</i>
<p>Guidance on criterion 7:</p> <ul style="list-style-type: none"> • <i>A site where conservation measures have a secure legal or other form of recognition, which cannot easily be reversed or eliminated may be an OECM. Examples of such legal recognition are a regulation, a spatial plan or a land-use plan.</i> • <i>Governance and management arrangements which support biodiversity conservation must be sustained, meaning they are in place for the foreseeable future.</i> • <i>Management activities can be seasonal or temporary, depending on the nature of the biodiversity and the threats (e.g. action to protect migratory species might only be needed when the species is present). However, there must be an intention to sustain the implementation of such seasonal actions for the long-term.</i> 			

TEST	QUESTIONS	RESPONSE	JUSTIFICATION
Criterion 8: Governance and management arrangements address equity considerations	Do the governance and management arrangements address the three aspects of equitability (recognition, procedure, distribution)?	<input type="checkbox"/> Yes <input type="checkbox"/> Uncertain or partially <input type="checkbox"/> No	<i>briefly summarise the information that supports the response given</i>
<p>Guidance on criterion 8:</p> <ul style="list-style-type: none"> Assessors should respond 'yes' to this criterion if governance and management institutions/mechanisms are making efforts to address equity considerations, and there is a reasonable likelihood of increasingly equitable outcomes in future. Equitable governance is defined as addressing: <ul style="list-style-type: none"> - recognition of the rights, identity, values, knowledge systems and institutions of rights-holders and stakeholders; - procedures result in inclusive rule- and decision-making; - distribution of costs and benefits from the management of the OECM. The management of an OECM should maintain any traditional spiritual, cultural and socio-economic values, where these exist, as long as management of these values does not undermine the biodiversity value of the site. <p>Further Information:</p> <ul style="list-style-type: none"> A tool for assessing the governance of a protected areas or OECMs, the Site Assessment for Governance and Equity (SAGE), is available at https://www.iied.org/site-level-assessment-governance-equity-sage 			

3.3 ASSESSMENT SUMMARY

3.3.1 GENERATING A FINAL RESULT

Use the table below to summarise the results of the screening and full assessment.

No.	Criteria	Response (tick one for each criteria)		
		Yes	Uncertain or partial	No
Screening criteria				
1	The site is <u>not</u> a protected area (PA)			
2	The site is <i>likely</i> to support important biodiversity values			
Full assessment				
3	The site is a geographically defined area			
4	The site is <i>confirmed</i> to support important biodiversity values			
5	Activities which threaten the important biodiversity values of the site are prevented or mitigated			
6	Governance and management of the site results in the <i>in situ</i> conservation of important biodiversity values			
7	Governance and management arrangements are likely to be sustained			
8	Governance and management arrangements address equity considerations			

A site with a 'yes' response for every criterion qualifies as an OECM, subject to stakeholder consent and recognition by national government

A site with one or more 'uncertain/partial' or 'no' responses does not qualify as an OECM.

3.3.2. NEXT STEPS FOR A CONFIRMED OECM

Where a site meets all the OECM criteria, the next steps are:

- The result of the assessment, with documentation, should be communicated to the governance and management authority(ies), Indigenous peoples, local communities and other important rights-holders and stakeholders.
- Documentation of the assessment process and results, including supporting data, should be securely stored for future reference.

- Where initial consent (step 2) was only for the assessment to be carried out, consent must now be obtained for the recognition and reporting of the site as an OECM
- Once consent is secured, the site should be reported through the World Database on OECMs (WD-OECM) by the governing authority, or by another stakeholder with the agreement of the governing authority. Guidance on reporting sites to the World Database on OECM is available on the Protected Planet website at: <https://www.protectedplanet.net/en/thematic-areas/oecms?tab=About>. The OECM should also be reported or listed, as appropriate, on any relevant national and local databases and documents
- Monitoring of the status of biodiversity, management and threats over time is key to management effectiveness and will be essential to ensure that the OECM continues to support the important biodiversity values for which it is identified.

3.3.3 NEXT STEPS FOR SITES WHICH DO NOT MEET ALL THE CRITERIA

Where a site does not meet all the OECM criteria, the next steps are:

- The assessment should be reviewed to identify the reasons that the site has not met the criteria. In particular, 'unknown/partial' responses should be examined to determine whether the criteria could be met with further information ('unknown' responses) or whether changes are needed to governance and management ('partial' responses), such as through capacity building. Where appropriate, an action plan for addressing these points should be developed.
- The result of the assessment, including any action plan and plan for re-assessment, should be communicated to the governing authority (where they are not the assessor), Indigenous peoples, local communities and other important rights-holders and stakeholders
- Documentation of the assessment process and results, including supporting data, should be securely stored, as this will form the basis for any later re-assessment
- The site may be re-assessed at any time by updating the existing data. The assessor should determine if the screening (step 1) and consent (step 2) stages of the assessment remain valid or if they need to be repeated.