



## Guidelines for organizing a fisheries learning exchange



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### ABSTRACT

This short communication piece presents guidelines and challenges for organizing fisheries learning exchanges (FLEs). Non-governmental organizations, government agencies, and resource users use FLEs to share best practices and bridge knowledge gaps between small-scale fishing communities and stakeholder groups. Even though FLEs are widely used and have numerous cited benefits, there are challenges associated with planning and implementing FLEs. To overcome these challenges and maximize FLEs' effectiveness, the authors describe guidelines for FLE organizers. The guidelines are based on the perspectives of over 20 FLE experts collected during 2013 through questionnaires, interviews, discussions, and surveys. The guidelines include steps that organizers should take before, during, and after a FLE. For instance, there was broad consensus that before a FLE, it is important to select a diverse group of participants, including both conservation advocates and critics, and to create an exchange agreement outlining the roles and responsibilities of participants. During a FLE, cultural activities and daily reflections by participants are valuable to the exchange process. After a FLE, activities that formalize the participants' involvement in the FLE are important, such as welcome-home ceremonies and participation certificates. Follow-up support for FLE participants is perceived as an essential step in the FLE and should be included in the FLE's budget. Finally, challenges in organizing FLEs are explicitly described and potential solutions to overcome those challenges are provided. The authors researched and compiled these guidelines and challenges to inform and improve the increasingly widespread use of FLEs.

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## 1. Introduction

Learning exchanges in the field of natural resource management allow stakeholders to share information and experiences regarding best practices, with the goal of replicating those practices and improving conservation efforts [1–6]. Learning exchanges have been increasingly used by non-governmental organizations (NGOs), government agencies, managers, and scientists to improve fisheries management strategies, particularly in the last decade [7]. Fisheries learning exchanges (FLEs) bring together fisheries stakeholders to exchange information for the improvement of resource management and the communities involved [7]. NGOs, government agencies, and resource users consider them to be

important tools in the adoption of successful marine conservation strategies [2,4,8–11].

While many international environmental organizations have cited the benefits of learning exchanges and advocated for their use [12–16], there still remain challenges to carrying out a successful exchange. Exchanges are expensive, time intensive, and have a demanding planning process with possible language barriers among participants [6,17]. Furthermore, there is a risk that participant mix will not be ideal, participants will drop out, or no follow-up actions will be taken [17]. While online knowledge exchange platforms are low-cost options [17,18], the personal interactions and shared experiences that are a major part of FLEs are essential to “build the mutual trust required for true information sharing” and to “track the implementation of new technologies and assess their effectiveness in solving real-world problems” [12].

As the results of more exchanges are made public, organizations have formulated recommendations for overcoming the challenges. International development organizations, such as the

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World Bank and its Growing Forest Partnerships and South-South Knowledge Exchange initiatives, published general recommendations to assist organizers in planning and conducting exchanges related to primarily agriculture and sustainable forestry [17,19]. Some current recommendations when planning an exchange include: set clear goals [5,19], adequately brief the participants before exchange [5,6,19], have a detailed agenda [17], invite a diverse participant group [6], include hands-on activities and reflective discussions [6,19,20], conduct evaluation [5,17,19], and provide follow-up support to participants [5,19].

While the recommendations for organizing learning exchanges related to agriculture and sustainable agriculture can be useful, there is a need for more detailed guidelines for organizing specifically FLEs, as coastal and marine systems present unique management challenges and therefore should not be compared to land-based environments [21]. This paper presents guidelines and challenges of conducting FLEs based on the knowledge and experiences of expert FLE organizers and participants. These detailed guidelines are important for organizers to conduct FLEs as effectively as possible, using the most of the time and funds that are required to organize FLEs while achieving the FLE's purpose. The guidelines will help organizers predict and overcome the many challenges associated with implementing FLEs, including those challenges related to planning FLE logistics, forming ideal participant groups, conducting appropriate activities, and following-up with participants. The guidelines presented here will help ensure that scarce fisheries improvement and conservation funding is best utilized.

## 2. Methods

The authors drew the guidelines presented in this paper from data collection efforts connected to a workshop organized by two authors (Jenkins and Peckham) in May 2013 entitled *Fishermen Learning Exchange for Conservation: An Examination of Lessons Learned (FLExCELL)*, which was hosted and sponsored by the National Socio-Environmental Synthesis Center (SESYNC) and attended by an international group of FLE organizers and participants [7,22].

Before the workshop, FLExCELL organizers sent a questionnaire to 25 workshop invitees to gather information about how they define a FLE and about FLEs they had previously organized or attended. The questionnaire received a 68% response rate. Information from this questionnaire was collected and summarized in one document that the FLExCELL organizers distributed to participants before the workshop. During the workshop, the 21 workshop participants (14 had completed the pre-workshop questionnaire and 7 had not) reviewed and collectively edited the document, so that the knowledge of all workshop attendees was included in the summary document, resulting in a combined contribution of 24 experts to the creation and review of the document. The summary document included a list of lessons learned [23], which serves as the basis for the guidelines and challenges presented here.

One breakout group of three workshop participants during FLExCELL used this collective list of lessons learned to create an outline for a list of guidelines for organizing FLEs. All 21 workshop participants provided feedback on the outline and the breakout group members incorporated the feedback into the outline, which formed the basis for Tables 1 and 2 of this paper.

The authors of this paper then supplemented the outline created by the breakout group with information gathered through interviews with 21 experts during and following the workshop (Of

these 21 interviewees, 19 were workshop participants and two were not). The authors asked the experts about lessons learned from FLEs they had planned or participated in, as well as the FLEs' purposes and outcomes. The authors used the data analysis program MAXQDA 10 to code data and analyzed data with a grounded theory approach to text analysis [24,25]. The authors then sent the text analysis results in a survey through SurveyMonkey to twelve of the interviewees who had spoken in detail about specific exchanges asking to what extent they agreed or disagreed with the results. The survey had a 67% response rate and revealed that all interviewees either Strongly Agreed or Agreed with the results.

The guidelines and challenges presented in this paper are a synthesis of experts' pre-workshop questionnaire answers, the outline created during the workshop, and interviews with experts during and after the workshop.

## 3. Guidelines for organizing FLEs

The authors offer the following guidelines for organizers of FLEs (Table 1). The guidelines are separated by the three phases of a FLE: planning (before exchange), implementation (during exchange), and follow-up (after exchange). It is strongly recommended that an FLE's budget include all three of these phases.

## 4. Challenges of organizing FLEs

FLE organizers are encouraged to follow the guidelines presented in Table 1. These guidelines do, however, pose potential challenges to organizers, and each challenge may impact the FLE's purpose if not overcome. It is important for FLE organizers to be aware of the range of issues they may come across so that they can be prepared and dedicate the necessary time and effort towards solving these challenges. The authors describe challenges organizers may encounter, their level of impact on FLE purpose, and solutions to challenges (Table 2).

## 5. Conclusion

The guidelines and challenges presented here are based on FLE experts' perspectives following their involvement in previous FLE experiences. While our original intent was for organizers to use these guidelines specifically for planning and implementing future FLEs, the guidelines can also assist organizers of other types of learning exchanges related to the management of coastal or marine systems. These FLE guidelines support and provide more detail to the broader lessons learned already documented from learning exchanges in the fields of agricultural, forestry, waste management, and flood protection [17,19]. Future research, such as a comparative case study analysis suggested by Jenkins et al. [7], an article that discusses the history and scope of FLEs, could determine the extent to which these guidelines are best practices that can be widely employed across various FLE contexts. As these guidelines and results of future research on FLEs are increasingly refined and made available to organizers, FLE effectiveness can be maximized, thereby benefiting fisheries management and marine conservation practices globally.

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