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FISHERIES LEARNING EXCHANGES

A SHORT GUIDE TO BEST PRACTICE

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ABOUT THIS GUIDE

This handbook provides guidance on developing, implementing, evaluating and sustaining fisheries learning exchanges (FLEs). A collaboration between FAO, the NGO Blue Ventures and the research initiative FLExCELL, it draws on experiences from dozens of learning exchanges over the past decade to provide actionable, accessible advice and best practices.

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While anyone seeking to better understand FLEs will find the information presented here of use, the guide is aimed primarily at practitioners such as NGOs and government workers acting as technical partners to fishing communities in tropical developing countries.

By blending research into FLE best practices with extensive insights from the field, this guide provides you with the necessary tools and guidance to develop effective learning exchanges. Because no two FLEs will be the same, it adopts a comprehensive but not prescriptive approach with a focus on flexibility and the need to consider differing contexts.

The guide is structured as a simple ten-step process covering the major activities that should be undertaken before, during and after a learning exchange.

1. Develop objectives
2. Assemble the team
3. Select participants
4. Make logistical arrangements
5. Design the activity programme
6. Prepare for the learning exchange
7. Implement the learning exchange
8. Document and measure
9. Debrief
10. Keep up momentum

The steps provide in-depth guidance on best practices and common pitfalls, as well as links to other useful resources. You'll also find a detailed checklist with practical reminders of the most important steps involved in successfully organizing learning exchanges.

We hope you find this guidebook useful in your knowledge sharing efforts and welcome your thoughts and feedback at info@blueventures.org.

THE TEN STEPS

01 Develop objectives

02 Assemble the team

03 Select participants

04 Make logistical arrangements

05 Design the activity programme

06 Prepare for the learning exchange

07 Conduct the learning exchange

08 Document and measure

09 Debrief

10 Keep up momentum

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FISHERIES LEARNING EXCHANGES

AN INTRODUCTORY Q&A

INTRODUCTORY Q&A

1. WHAT IS A FISHERIES LEARNING EXCHANGE?

A fisheries learning exchange, or FLE, brings together representatives from different communities to share knowledge and expertise in fisheries management and marine conservation.

Contexts and precise definitions vary, but an FLE generally has two central components: travel and knowledge exchange. A "typical" exchange, so far as one exists, would see fishers, leaders and other members of one community (the visiting community) travel to another (the host community) to learn about a successful fisheries management approach. Through a programme of field visits, workshops, practical activities and one-to-one dialogue, fishers from the visiting community learn the benefits, drawbacks and enabling conditions of the approach, with a view to adopting it upon their return home.

To date, most FLEs have been organized by conservation organizations and networks of fishing communities, but other actors also initiate learning exchanges. They are sometimes known as look-and-learn visits, study tours, cross-visits or South–South exchanges.

2. WHICH COMMUNITIES CAN BENEFIT FROM FLES?

FLEs offer benefits to a wide range of communities interested in curbing overfishing or using marine resources more sustainably, but they may be particularly useful in relatively small and homogenous contexts where there are legal and institutional frameworks supportive of community-based management. FLEs can be successful in other circumstances, but lead times will generally be longer. Communities that are larger tend to be more complex, while those in countries where resource management is not devolved to the local level will likely need government support and involvement to first develop appropriate procedures and policies.

3. WHAT ARE SOME OF THE ADVANTAGES OF AN FLE?

FLEs are a relatively recent innovation, and the evidence base is still emerging. But researchers and practitioners are finding that they can be a valuable way to advance fisheries management efforts. The hands-on, peer-to-peer learning environment created by a learning exchange helps participants to learn better, improves their information retention, and may also increase their enthusiasm for the topic. The sharing of challenges as well as benefits helps communities to prepare for, or even avoid completely, these challenges themselves.

By building confidence and capacity, and motivating individuals to act, learning exchanges can also translate this increased knowledge into action, with positive results for fisheries management and conservation at the site level. Moreover, where learning exchanges lead to adoption of successful approaches at multiple sites, they may even catalyse change at the institutional level.

4. ARE THERE ANY DRAWBACKS TO FLES?

FLEs can be expensive undertakings, particularly when they are international in scope. For organizers, the costs for travel, accommodation, administration, facilitation and translation can be considerable. For participants, giving up fishing for the duration of the learning exchange may lead to an unacceptably high level of foregone income, while long-distance travel can be tiring. One informal survey in May 2013 put the average spending per participant across four FLEs at USD 2 700 (Jenkins *et al.*, 2017), though it's possible to reduce this cost, especially when participants are from neighbouring regions of the same country.

Where contexts of the exchanging communities differ considerably, there is an additional risk of unintended consequences. For example, during a learning exchange between octopus fishing communities in southwest Madagascar and Mexico, the Malagasy fishers learned a new fishing method from their Mexican counterparts, which, if implemented in Madagascar, could negatively impact stocks there. Though such a situation has not yet come to pass, this case suggests that the outcomes of learning exchanges might not always be universally positive.

CASE STUDY ONE: LEARNING EXCHANGE BENEFITS

In Madagascar, FLEs have been instrumental in driving an unprecedented expansion in local fisheries management and conservation initiatives that has led to policy change at the national level.

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Since 2004, the small-scale fishing communities of Andavadoaka in southwest Madagascar have been implementing periodic fishery closures for the reef octopus Octopus cyanea, a regionally important species that is both consumed locally and sold for export to southern Europe.

The closures, defined areas that typically comprise 20–25 percent of a community's overall octopus fishing grounds, are usually in place for 2–3 months at various times of year. When well managed, evidence suggests that they can improve fisher catches and income. An analysis of eight years of data found that octopus landings increased by more than 700 percent in the month following the lifting of a closure, boosting the catch per fisher per day by almost 90 percent over the same period.

The closures form the foundation of the Velondriake Locally Managed Marine Area (LMMA), a 640 km² protected area in which destructive practices such as poison fishing and the use of beach seine nets have been banned. Seven marine reserves permanently off limits to all fishing have been established, in addition to the periodic octopus closure areas. Velondriake is managed at the local level, with an elected association of village representatives (the Velondriake Association) responsible for all regulations and enforcement. Support and technical backstopping is provided by the UK NGO Blue Ventures.

The apparent successes of both Velondriake and the closures that preceded it have led other communities to follow suit. To date (2017), more than 190 LMMAs, many of them encompassing temporary octopus closures, have been established. Together, these areas now cover 14.5 percent of Madagascar's continental shelf (14 023 km²) and are the dominant form of marine resource management in the country. Similar regimes have spread to the United Republic of Tanzania, Mayotte, Mexico, Mauritius, Indonesia and Mozambique.

As a result of this expansion, the Malagasy Government has introduced new policies to improve the sustainability of the octopus fisheries and committed to a tripling of marine protection, with a focus on locally centred approaches.

It's unlikely that the octopus closures and the LMMAs that followed would have spread so far and so fast without the use of FLEs, illustrating their importance as a catalyst for broader-scale change. Over the past decade, an estimated 550 fishing community representatives have visited Andavadoaka to learn about octopus closures and LMMA establishment, to discuss management issues, and to witness the reopening of a closure.

INTRODUCTORY Q&A

5. WHAT ARE THE DIFFERENT TYPES OF FLE?

There are three main types of FLE, a **model transfer** exchange, a **reciprocal** exchange and a **congress-style** exchange. Each type can be **national** or **international** in scope, depending on whether or not all of the participants are from the same country.

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MODEL TRANSFER EXCHANGE

In a model transfer exchange, a community delegation visits a model community to learn about a management solution. For example, the Environmental Defense Fund (EDF) brought fisheries stakeholders (government officials, leaders of fisher cooperatives and associations, and representatives from conservation NGOs) from around the world to British Columbia, Canada to see the benefits of a catch share system for themselves. On their return home, several participants went on to establish similar programmes, thereby transferring the model to their own communities.

RECIPROCAL EXCHANGE

Reciprocal exchanges involve representatives from two or more communities visiting each other to exchange experiences and insights, typically with a view to developing solutions to shared issues. For instance, between 2005 and 2007 communities from Hawaii, Japan and Mexico visited each other to discuss challenges related to bycatch mitigation. This process led to significant decreases in bycatch mortality of loggerhead sea turtles in Mexican waters and laid the groundwork for introducing turtle-friendly nets in Japanese fleets.

CONGRESS-STYLE EXCHANGE

During a congress-style exchange, fisheries stakeholders from several communities come together in a central location to share experiences, information and best practices. For example, a workshop at the 2012 IUCN World Conservation Congress in Jeju, South Korea brought together 17 community fishery leaders from across the South Pacific, western and central Indian Ocean, Caribbean and Central America. The delegates exchanged best practices, lessons learned and common challenges in community fisheries management, and explored the possibility of establishing a global network (as yet unrealized) aimed at facilitating the sharing of timely and relevant information.

A congress-style exchange typically does not include site visits to see management strategies in action, and therefore more closely resembles a conference or workshop in terms of its organizational challenges. The focus of this guide is on the development and organization of model transfer and reciprocal exchanges. For guidance on congress-style exchanges, a number of excellent resources already exist, including The World Bank's *The Art of Knowledge Exchange* handbook (World Bank, 2016).

FISHERIES LEARNING EXCHANGES

TIPS FOR SUCCESSFUL EXCHANGES

TIPS FOR SUCCESSFUL LEARNING EXCHANGES

Every FLE is different. Contexts, activities, objectives and logistical requirements all differ, as does the definition of success. In the short term, for instance, a successful learning exchange might be one in which participants return to their communities feeling motivated to take action, and armed with tangible experiences and lessons learned from similar communities that they can apply at home. In the long term however, that same learning exchange would need to turn knowledge and motivation into fisheries management and conservation action in order to be considered a success. Despite this variation, seven general principles for successful learning exchanges have emerged from FLE research and practice. These principles are summarized in this section.

1. HAVE A CLEAR OBJECTIVE

It's obviously very difficult to evaluate the success of an FLE without knowing what you're setting out to achieve. It's absolutely vital to craft a clear objective that aligns with the wishes of the communities involved.

STEP 1 PROVIDES MORE INFORMATION ON THIS.

2. START EARLY

Learning exchanges, particularly when they involve international travel, require a huge amount of time and effort. It's easy to underestimate the resources required to develop and implement them successfully, and in many cases, doing so means taking field staff away from their day-to-day obligations to focus on the learning exchange. As such, it's important with any exchange to estimate not only the cost, but the opportunity cost as well – i.e. what your staff could be doing instead – before you decide whether to proceed. It's often a good idea to bring in at least one new staff member dedicated entirely to exchange organization, thereby minimizing any burden on field teams. Key staff should consider beginning work on the exchange at least a year before the first visit is slated.

STEPS 2 AND 4 COVER PLANNING IN MORE DETAIL.

3. SEARCH FOR A SIMILAR CONTEXT

Learning exchanges tend to work best when the communities participating are similar, so strive to engage communities with comparable culture, language and background. It's also helpful if both communities target similar species (e.g. sea cucumber or octopus) in similar places (e.g. on a coral reef or in a mangrove), and using similar gear (e.g. a spear or handline).

The more aligned the communities, the faster the learning exchange may progress and the more likely it will lead to sustained improvements in fisheries management or community conservation. Blue Ventures has found that learning exchanges between similar octopus fishing communities in southwest Madagascar led to better outcomes more rapidly than international exchanges between communities with very different contexts (see Case study 1).

However, be careful that the exchanging communities aren't too similar, or there may be too significant an overlap between their experiences for the learning exchanges to be worthwhile.

4. FIND FUNDING

Aside from being time-consuming, learning exchanges can be extremely expensive. Costs will vary depending on distance between communities, length of visit and which country is the host, but you should budget for up to USD 3 000 per visiting participant to cover logistical costs such as transport, food, accommodation and translation. Costs for host participants will be much lower but can still be significant, especially if participants take part in organized activities away from their villages. Follow-up activities may also require additional budget, particularly if none of the partners has a presence in the host and visiting communities. You should also consider compensating exchange participants for their time spent not working. The amount should be agreed in advance, be in accordance with the local context and be high enough to make the learning exchange attractive to the participant, but not so generous as to encourage a culture of compensation. Here, as in so many aspects of a learning exchange, detailed knowledge of the participating communities is essential.

STEP 1 PROVIDES MORE INFORMATION ON THIS.

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5. SELECT PARTICIPANTS CAREFULLY

Selecting participants is one of those tasks that can make or break a learning exchange. In many cases the objective of an FLE will be to improve fisheries management or conservation in at least one of the participating sites. At the community level, it's therefore vital to ensure that there is already at least some degree of interest in locally led natural resource management in both communities. In a model transfer exchange the host community must be supportive, have relevant experience and be honest about their model – especially its challenges. It's also crucial to avoid visiting the same model community too frequently, as this runs the risk that they may grow tired of hosting. A better approach might be to use a rotating selection of communities who previously visited a host community and successfully transferred the model to their context. These communities will be motivated to host by the sense of accomplishment of having gone from exchange attendee to host community.

When it comes to selecting participants, a high level of local knowledge is required. To maximize the chances of a successful outcome, participants should be

1. sufficiently well-informed to understand the key messages of the learning exchange;

2. seen as legitimate in the eyes of the community – while exchanges should include a wide variety of participants, the majority of those taking part should ideally be fishers;

3. sufficiently respected by the community that their messages will be listened to and acted on.

It's also a good idea to select at least one participant known to be sceptical and unafraid of asking difficult questions. If a learning exchange can convince the village's most ardent sceptic of the benefits of improved fisheries management, it will be easier to convince others who are also hesitant.

SEE STEP 3 FOR MORE ADVICE ON SELECTING PARTICIPANTS.

6. CREATE A LEVEL PLAYING FIELD

It's crucial in any FLE that both the hosts and the visitors feel their opinions and experiences are equally valued. Otherwise there is a possibility that resentment will creep in, reducing the likelihood of a positive outcome. To help avoid this, activities should be planned to allow a free-flowing, multidirectional exchange of information among peers. Similarly, a facilitator should be selected who is impartial, respectful, constructive and preferably able to speak the languages of both communities.

Accommodation can also be used to create a level playing field. If the visiting participants are all put up together in a guesthouse for example, there is a danger that this might reinforce or engender a feeling of otherness or inequity. Consider accommodating visitors with host families or in other homestays. Doing so can break down barriers between exchanging communities and also build empathy and trust.

STEPS 4 AND 5 COVER THIS IN MORE DETAIL.

7. DON'T FORGET THE FOLLOW-UP

Follow-up after an FLE is crucial. The supporting organization must ensure that participants have understood key messages, synthesised what they've learned, and are comfortable leading discussions in their own communities.

STEPS 9 AND 10 FOCUS ON FOLLOWING UP.

BEFORE THE EXCHANGE

01 Develop objectives

02 Assemble the team

03 Select participants

04 Make logistical arrangements

05 Design the activity programme

06 Prepare for the learning exchange

07 Conduct the learning exchange

08 Document and measure

09 Debrief

10 Keep up momentum

01: DEVELOP OBJECTIVES

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COMMON OBJECTIVES

At the heart of any successful exchange is a clear and well-crafted objective. The overarching objective of most FLEs is to encourage certain actions or behaviours, but they can have a wide range of more specific objectives. For example

1. To develop support for marine conservation and fisheries management initiatives

2. To develop support for fisheries interventions with the potential to curb overfishing and lead to sustainable use

3. To create a forum for dialogue, encouraging fishers to talk about their problems and propose solutions

4. To introduce sustainable alternatives to fishing, for example aquaculture or ecotourism

5. To share information about fishing gear in order to decrease bycatch

When developing your objectives, ensure that the needs of the community are placed front and centre. Talk to community members and ascertain where their particular interests lie. Also bear in mind that you have no way of knowing what will happen during the learning exchange itself. Despite your stated objectives to develop support for marine conservation and fisheries management initiatives among your community, you may well discover during the learning exchange that there is greater interest in alternative livelihood activities. Make sure that your objectives leave you with room to be responsive and flexible to the desires of the group.

IS A LEARNING EXCHANGE THE RIGHT APPROACH?

Once you've decided on your objectives, it's time to reflect on whether an FLE is the best way to meet them. Consider, for example, whether increased technical support might be cheaper and more effective. If you have identified a possible exchange site for your community to visit, are their safety concerns or strict visa requirements which could render a learning exchange too challenging?

FUNDRAISING

Once you have set your objectives and determined that a learning exchange is the best way to meet them, it's time to secure funding. Learning exchanges can be very costly. For those involving international travel, you might need to budget up to USD 3 000 per participant. In addition, you may need to include provisions for translation and facilitation, and provide per diems for all those taking part. You should also think about how the learning exchange will be communicated externally (e.g. to funders). For example, having a videographer accompany the exchange can be useful, but will add significant expense.

02: ASSEMBLE THE TEAM

The majority of FLEs will involve different NGO and/or government partners supporting each of the participating communities. So, as a first step, it's important to pull together an exchange committee composed of a balanced mix of staff from each partner organization. Ensure that field staff are adequately represented. They will know the community the best and be able to advise you on what is feasible in terms of itineraries and participants. In the early stages of the process, the exchange committee does not need to meet regularly; once a month is typically about right. However, as the first exchange visit nears, the meetings will necessarily become more frequent as the workload demands.

Early committee meetings should start as close to receipt of funds as possible and should be used to determine resource allocations, funding splits and financial processes. Should one NGO pay for everything, and book flights and accommodation? Will local costs be covered by the host NGO, or should the visiting NGO pay its own way and claim reimbursement afterwards? If the latter, is it necessary to set a daily rate for major items like food? Being upfront about this and deciding it early on will avoid misunderstandings down the line.

In the case of a model transfer exchange, it's possible that the original funding proposal may have overlooked how the model hosts might also benefit from the exchange. If this is the case, it's important to understand what the host community is keen to learn from the visitors and ensure this is incorporated into planning during early committee meetings.

Similarly, it's also worth establishing at this stage whether the participating NGOs are interested in aspects of the other community that fall outside the stated objectives of the learning exchange. For example, a host community may have a successful ecotourism initiative in addition to those targeting fisheries management. While the visiting NGO may have determined, in discussion with the community, that such an initiative is not the right fit for that community, they may themselves wish to learn more, with a view to determining its potential for other communities they support.

03: SELECT PARTICIPANTS

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With resource and funding allocations decided, the next major task is participant selection for the learning exchange. This may seem straightforward in theory, but it's enormously challenging in practice, and all too easy to get wrong. Here are some pitfalls and groups to be wary of.

1. **Failing to consult the community widely**. If you only ask community leaders who they think should participate, there's a danger you'll just regurgitate existing power structures: i.e. the most powerful families will be the ones who attend.

2. **Educational bias**. Don't select participants on the basis of educational attainment alone. While it's important that they are able to grasp the nuances of what they see and learn, it's more important that they have the ear of the community, and can relate to what they see (if they fish, for example).

3. **"Joiners"**. Joiners are people who are members of every association or initiative. They are often the first to volunteer and tend to be enthusiastic advocates, all of which gives them the appearance of a perfect candidate. But if their community knows them as individuals who agree with everything, they may not trust joiners when they later try to convince them of the benefits of community fisheries management.

4. **Older people, new mothers, or those with health problems**. Learning exchanges, particularly those that are international in nature, often involve extensive travel, and can be very tiring. Where the respective contexts of exchanging communities are quite different, stress arising from cultural and geographical unfamiliarity can be an issue.

5. **People on very restricted diets**. Food in a host community may be completely different from what visitors are used to, and far more limited in terms of options. As such, people with unusual dietary requirements may struggle with what's on offer.

6. **Government officials**. Involving government workers in a learning exchange can be vital, especially in contexts where national legal frameworks may not be amenable to community-led management. However, in situations where there is little engagement between the state and local institutions, or where there is an established history of local-level resource management, participants may feel reluctant to share information in front of government officials, so care should be taken when extending an invitation to them.

Your selection of participants should depend to an extent on the objectives of the learning exchange and your existing relations with the community you're accompanying.

If you know the community particularly well, you could identify which subgroups you'd like to see represented in the learning exchange – for example a young fishers' group or women's organization – and approach them directly. In other circumstances, ask the community as a whole, but brief them first. Explain the types of people you want. Ask members to make a long list and then have them vote anonymously for their favourites. Be as community-led as possible in the selection process, especially when you don't know the community well.

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Irrespective of your knowledge level, here are some key pointers for selecting participants.

IDENTIFY THE INFLUENCERS

Participants should be trusted sources of information in their communities, with sufficient influence and standing to enact change if required. They should be observant, willing to speak in front of groups, energetic, and not afraid to ask lots of questions. Ideally, you want someone who the community feels understands their best interests, evaluates things critically (but with an open mind), and can be trusted. It's also important to select participants who are likely to stay in the village over the long term.

SELECT THE SCEPTICS

It's a good idea to pick individuals who aren't convinced by the objectives. These types of people will often be the first to oppose a management or conservation measure, so turning them into early advocates is enormously advantageous. If you can convince the sceptics, you can convince anyone.

FIND THE FISHERS

Fishers often make the best exchange participants, as they have the skills and experience to gain a detailed understanding of the initiatives in the host community, and will often share a similar socio-economic background with their exchange counterparts.

ENSURE YOUR GROUP IS DIVERSE

While it's a good idea to have plenty of fishers in your exchange party, it's important that other voices are not crowded out. Different people provide different perspectives, and successful learning exchanges often include non-fishers such as traditional leaders or members of women's organizations. There are no hard and fast rules, but a good rule of thumb is to ensure that no more than three-quarters of your group are fishers. Whatever the final makeup of your group, it's important that the different exchange community groups mirror each other. People feel comfortable when they see people like them, so this helps to ensure that all members of the group feel valued.

DON'T SUPERSIZE

Exchange groups should be large enough to disseminate key lessons learned to their community effectively, but not so large that opportunities for one-to-one dialogue with the other community are lost. While it's often tempting to take advantage of the economies of scale inherent in learning

exchanges (it costs the same to hire a minibus irrespective of whether it's transporting 5 people or 25), experience suggests that it's more important to identify participants with the social capital to motivate their community to action, rather than obsess over numbers. That said, larger communities with more committees, cooperatives and other local-level institutions are more complex, and may therefore benefit from a larger exchange delegation.

INVOLVE WOMEN

You should always strive to ensure adequate representation for women in your exchange group, but this can be challenging. In many developing countries, women are often responsible for the day-to-day functioning of the family. Thus it can be difficult for them to leave behind daily household management and child care responsibilities to participate in a learning exchange. Culturally, younger women may need to be accompanied by a chaperone (whose costs would need to be accounted for in any budget). In addition, some men may be uncomfortable at the thought of their wives travelling to other places without them, placing additional pressures on families.

When it comes to determining who to select, it's important to remember that a women's organization is rarely a representative sample of women in a given community. To avoid resentment, try to ensure as much as possible that everyone has an equal chance of participation.

EDUCATION IS IMPORTANT

While it's more crucial to ensure that exchange participants have a sufficient standing in the community to spread ideas and enact change effectively, they must nevertheless be informed enough to understand and apply the key messages of the learning exchange. If the exchange is international in scope, work with the committee to establish what the primary language will be, and try to ensure as much as possible that participants are fully fluent in it. It's also important that they are receptive to working with the NGO partner to refine the messages that they bring back from the learning exchange to their communities, in order to maximize the likelihood that these will then adopt sustainable fishing practices.

IT'S A MIX

It's unlikely that you'll be able to identify a single person who possesses all of these traits, but you should strive to make sure that each participant has as many of them as possible. Ultimately, as long as the group as a whole covers all these bases, your chances of a successful outcome will be increased.

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04: MAKE LOGISTICAL ARRANGEMENTS

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With the exchange groups selected and the objectives clarified, it's time to start work on the logistics. This phase is among the most time-consuming of the whole process, and it's vital to ensure that you start it as early as possible.

ARRANGE VISAS AND PASSPORTS

Depending on the country in which you work, you may find that some, many, or even all of your exchange party lack passports. A related problem is that of visas. Rules for citizens of many tropical developing countries wishing to visit other countries can be onerous and complex, and may take time to navigate (see Case study 2).

A good (though not foolproof) way of assessing whether this aspect of the planning process might be particularly challenging is to make use of Travelscope's interactive world passport map. Simply click on any country to see at a glance which other countries' passport holders can travel visa-free. For example, let's assume that you want to organize a model transfer exchange that would see a delegation travel from Mozambique to visit a coastal fishing community in Indonesia. Simply clicking on Mozambique and then Indonesia will tell you immediately that no visa is required.

If you want to plan a return leg that would see the Indonesian delegation visit Mozambique after the original visit to Indonesia by the Mozambican exchange party, then you'd need to additionally check visa requirements between Indonesia and Mozambique (by clicking on Indonesia, then Mozambique) as well as between Mozambique and Indonesia. They're not always the same. For example, South Africans do

not need a visa to visit Indonesia, but Indonesians do need a visa to visit South Africa.

Passports and visas may seem like a relatively trivial part of the entire exchange process, but if they can't be arranged in time, the learning exchange won't be able to proceed. Allow plenty of time for this step.

DETERMINE WHETHER A SCOPING VISIT IS REQUIRED

Next, determine whether a scoping visit is needed. Scoping visits, where one of the NGO partners visits the other to prepare the ground ahead of the learning exchange, can add significant additional expense, especially where international travel is required; these should be considered carefully.

In situations where the respective contexts of the exchanging communities are quite different, scoping visits may be particularly useful. For example, in the Madagascar–Mexico exchange profiled in Case study 2, the project lead from one of the Mexican partners travelled to Madagascar ahead of the first leg of the learning exchange. The time was used to visit the exchange community and meet with community partners, government representatives and seafood buyers, and to build a strong understanding of the country's environmental and socio-economic context, communities and fisheries. The results of this scoping were used to develop an itinerary for the first leg of the learning exchange specifically tailored to the needs of both fisher groups, maximizing opportunities to capitalize on participants' experience and expertise.

In other cases, especially where budget is a concern, it may be a good idea for an NGO partner from the visiting delegation to travel to the host community a few days before the learning exchange itself to help with planning and ensure that the needs of both parties will be met by the exchange.

HEALTH, RISK AND INSURANCE

Health, risk and insurance policies will be specific to the organizations coordinating the learning exchange, but it's important to ensure adequate coverage. Blue Ventures' field sites in Madagascar are remote and lack comprehensive medical facilities. As such, for all communities that visit, the organization insists on travel and health insurance for the participants it supports, as well as a basic health screening at a local hospital or private clinic to check for pre-existing conditions that may preclude travel, and to recommend appropriate vaccinations. For participants supported by partners, Blue Ventures advises a health screening and vaccination assessment, and suggests that any pre-existing conditions be checked, noted and considered before travel.

TRAVEL AND ACCOMMODATION

In the case of international exchanges that require air travel, the next thing to do is arrange flights. Because flying may be a novel and tiring experience for some of the exchange participants, it's important (where possible) to minimize flight times. When selecting a route, try to avoid countries that require transit visas, and ensure that flights involving multiple carriers are booked on one ticket with baggage checked all the way through.

All in-country logistics should be handled by the exchange partner based in that country. They know the context and may have access to internal flights and local accommodation options that international travel agents will not. The local partner should organize all ground and air transportation, including taxis or minibuses to/from airports at the beginning and end of the learning exchange.

For accommodation, try to avoid putting all visiting participants together in a guesthouse or hotel unless the hosts are also staying there. If facilities permit, consider accommodating visitors with host families in homestays. This can break down social barriers between exchanging communities, and build empathy and trust.

CASE STUDY 2: THE CHALLENGES OF ARRANGING PASSPORTS AND VISAS FOR PARTICIPANTS IN AN INTERNATIONAL EXCHANGE

When the NGOs Blue Ventures, Pronatura Noroeste and SmartFish International secured funding for an international exchange between small-scale octopus fishers in Mexico and Madagascar, they did not initially appreciate how much effort and time would be needed to organize visas.

The first leg of the exchange took place in August 2015, when a delegation from the Mexican community visited Madagascar to learn about the short-term octopus fisheries closures carried out there over the past 11 years as a management tool to build catches and income (Case study 1). For this leg, little time was spent on visa logistics, because Mexican passport holders were able to buy a visa upon arrival in Madagascar.

The return leg, which saw the Malagasy participants visit their counterparts in Mexico, was an altogether more challenging affair. Malagasy citizens wishing to visit Mexico require a visa in advance, but, as there is no Mexican embassy in Madagascar, it was not possible to procure one in-country. Instead, the Malagasy delegation had to fly to South Africa to be interviewed for Mexican visas at the embassy in Pretoria.

Because they also required visas to visit South Africa, they had to first travel to the South African embassy in the Malagasy capital Antananarivo, and to wait there for several days while their visas were arranged. This whole process added a month and significant additional expense to the return leg, and took time away from preparing the Malagasy participants for cultural differences. The NGO partners began the process of securing visas a full seven months before the Mexican leg of the trip, building support for the learning exchange in Mexico and working with the Mexican ambassador in South Africa to allow visas to be granted more quickly than normally possible. Without this foresight, it's likely that the return leg would have been unable to proceed.

05: DESIGN THE ACTIVITY PROGRAMME

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Once the logistics are arranged, the activity programme can be developed. Its make-up will necessarily be driven by the message to an extent, so it's important not to have too many messages that you want to convey. Stick with one or two, and build the activity programme around them.

Given that objectives and messages will differ from exchange to exchange, there isn't one "right" way to organize a programme. However, these pointers should help to maximize the chances of a successful learning exchange. Note that the structure and relative merits of individual sessions falls outside the scope of this guide. For detailed information on this, please see the World Bank's guide (World Bank, 2016).

SEEING IS BELIEVING

Within any learning exchange, field visits are critical. Try to plan activities that allow hosts and visitors to fish together or visit seafood buyers. But even just visiting an area of a reef that's been closed is much more powerful than just talking about it. Even though participants might not be able to see changes to the reef that have resulted from the closure for themselves, a visit can transform it from abstract concept to real management intervention, allowing participants to understand the size and physical characteristics of a particular area.

Be careful of trying to pack too much field time into your programme, however. Often the most inspiring hands-on activities are the most logistically challenging. It's important to strike a balance between allowing exchange delegations to participate in practical, field-based activities and giving them sufficient time to rest, recuperate and reflect on those activities.

PLAN UNSTRUCTURED TIME

Allow plenty of opportunities for visitors and hosts to converse and learn from one another. Even traditionally formal activities like a village orientation for visitors can be transformed into an opportunity for one-to-one interaction and relationship building. For example, Blue Ventures-hosted learning exchanges in Madagascar often commence with members of the host community taking the visitors into the village, and then leaving them to ask anyone in the village any questions they like about local fisheries management and conservation initiatives. Allowing the visitors the chance to engage on their own terms with people who are not part of the learning exchange sets a tone of inclusivity right from the beginning, builds trust and transparency, and shows the visitors that the hosts have nothing to hide

CONSIDER BANNING POWERPOINT

Classroom sessions are an inevitable part of any learning exchange, but they should be as short and informal as possible, and focused on practical and interactive activities like role plays, games or icebreakers.

What works best will vary by context, so activities should be adapted to the needs of the individual communities. For some, silly icebreakers can help to build rapport; for others, storytelling sessions may prove to be more effective.

It's best to try to avoid formal presentations as much as possible. These can be both time-consuming and motivation-sapping, particularly when translation is required, and there's often a tendency to include too much detail. A visiting community is unlikely to need a comprehensive briefing on the biological, social and governance dimensions of a host's protected area, for example. It's far better to focus sessions on the advantages and challenges of the area, with a view to discussing whether it's something the visitors might like to try for themselves.

In classroom sessions, a picture is worth a thousand words. Encourage hosts and visitors to share pictures of their own communities and fishing practices. Don't be afraid to use physical pictures and a hand-drawn map. Beware of using PowerPoint, however: because it's so easy to add extra slides, presentations that start off as just a few pictures can all too easily grow to include management plans and "death by bullet points"!

TACKLE MISCONCEPTIONS

Prioritizing field activities and maximizing opportunities for one-to-one communication can help to create an environment where the visiting community feels sufficiently comfortable to voice any concerns about the host community's management and conservation initiatives. In the case of a model transfer exchange it's important to tackle any concerns and misconceptions, as not doing so will reduce the likelihood of successful adoption by the visiting community. You may need to plan a dedicated session in order to devote ample time to this task.

It's also vital that the host community representatives are able to speak openly about their failures and challenges. Most community members will want to show how well their initiative is working, and may be reluctant to share things that they are struggling with (like enforcing the rules). Try to select hosts who are happy to be honest, and discuss this with them before the learning exchange.

DON'T FORGET FEEDBACK

Feedback and reflection are among the most important aspects of any exchange programme, but are often the first to be culled when an inevitable overrun occurs. To minimize the likelihood of this, try to solicit feedback informally and on-the-fly rather than in a formal session on the same day.

AGREE ON A LANGUAGE

Before the learning exchange begins, identify a working language. Ideally try to find a language that all participants are conversant in. This is rarely possible, however, particularly when learning exchanges are international in scope. If more than one language is to be spoken, consider hiring interpreters. You could use willing field staff for this, but translation can be a full-time job, so unless the staff are able to put off their usual duties for the duration of the learning exchange, it's usually a better idea to use professionals.
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06: PREPARE FOR THE LEARNING EXCHANGE

GARTH CRIPPS/BLUE VENTURES

Once the activity programme has been developed, there are a few more things to take care of before the FLE kicks off.

DETERMINE COMMUNICATIONS ACTIVITIES

Decide how you are going to share the learning exchange with others. Depending on your budget and the objectives of the exchange, this can range from daily Instagram images, or a post-exchange blog post or news article, right up to a videographer accompanying the exchange party.

DETERMINE MAJOR FOLLOW-UP ACTIVITIES

Develop an overall feedback form, ensure that there are opportunities during the learning exchange for participants to complete the form, and work out how to share the feedback with the exchange committee and the communities themselves after the exchange is over.

It's crucial at this point to think about how visitors will share their newly acquired experience and knowledge with their own communities. If this is to be done through a guided image slideshow, for example, make sure participants have access to a camera or smartphone. If it's going to be through participatory video diaries, where members of the exchange party film themselves and their reflections and produce a video summary, determine whether there is a need to provide videography training and editing support, and plan accordingly. See Step 8 for more on this.

BRIEF THOSE WHO MAY BE AFFECTED

Field staff, government officials and village leaders not involved in the planning of the learning exchange but with the potential to be affected by it should be briefed on who is coming and why, and what their daily schedule will be. Be clear that they may need to provide time and support for the learning exchange, and make sure they're okay with this.

GARTH CRIPPS/BLUE VENTURES
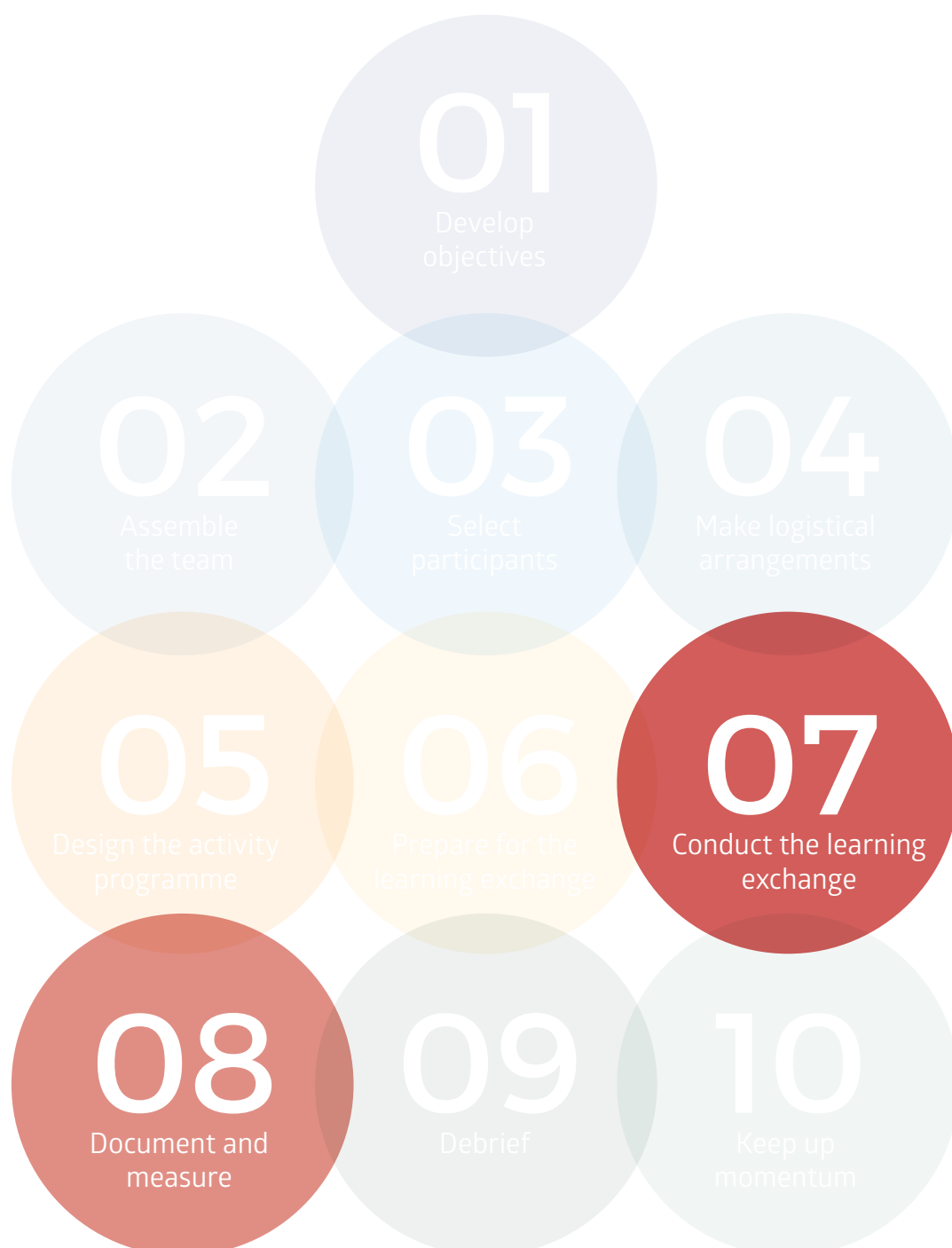
BRIEF PARTICIPANTS

As the starting date of learning exchange approaches, make sure you brief all participants effectively and arrange translation of materials as necessary. Produce a briefing packet for all visitors and hosts and send it to them before the learning exchange, but also ensure printed copies are available upon arrival. The packet should contain the following information:

- A country briefing, providing standardized information for visitors to the host community. The briefing should cover the field sites being visited and provide detailed information on the current status of the programmes at each site. It should recommend equipment and clothing for participants to bring, cover arrival and departure processes at borders and airports, and provide up-to-date information on currency, ATMs, and phone and Internet access. It's also a good idea for it to provide an overview of internal logistics, including accommodation and transport quality, as well as a map of the primary exchange village, and perhaps some key phrases in the local dialect.

- A copy of the daily schedule/itinerary

- A health and safety briefing, covering cultural dos and don'ts, safety tips and full emergency contact details for all members of the exchange party.

- A "who's who" with information (and pictures if possible) on who each of the participants are, what they do, and what they're hoping to get out of the learning exchange. .

Blue Ventures can supply example briefing documents on request. Please email info@blueventures.org for more information.

Finally, don't forget to make sure that visiting community members come prepared with information about their home fishery/community that can be shared with the host community. Maps, films, photos and stories work particularly well.

DURING THE EXCHANGE

01
Develop objectives

02
Assemble the team

03
Select participants

04
Make logistical arrangements

05
Design the activity programme

06
Prepare for the learning exchange

07
Conduct the learning exchange

08
Document and measure

09
Debrief

10
Keep up momentum

07: CONDUCT THE LEARNING EXCHANGE

GARTH CRIPPS/BLUE VENTURES

By this point, a lot of the hard work has been done. Objectives have been decided, participants selected and briefed, visas procured, flights and accommodation booked, itineraries finalized and activities planned.

Now all you have to do is put all the planning into action on the ground. Things, of course, are rarely so simple. Delayed flights, issues with accommodation and transportation, participant fatigue, and cultural, linguistic and culinary differences can all conspire to derail your learning exchange. The pointers in this section should help to keep things on track and maximize the chance of achieving your objectives.

ORIENT THE PARTICIPANTS

One of the first things to do once the exchange participants arrive is to orient them. Not every participant will have had the opportunity to digest the briefing packet, so it's a good idea to run through key points as a group and clarify anything that isn't clear. This is particularly important on international exchanges, where food, language, culture and context may be unfamiliar to visiting participants. Irrespective of the geographic scope of the learning exchange, make sure you find time during this session to cover any health and safety requirements.

MANAGE ADAPTIVELY

Even the best-laid exchange plans will often go awry. Transport may be delayed, or weather may intervene to interrupt field activities. It's important when this happens to not stick too doggedly to the itinerary. When it comes to dropping activities, prioritize practical field activities and one-to-one interaction over classroom sessions. Don't be

tempted to drop feedback sessions; rather solicit feedback informally on journeys or during moments of downtime. Use this information to manage the learning exchange adaptively, and don't be afraid to change up the programme based on this feedback. Participants will thank you for it, and feel more motivated and valued as a result.

RECOGNIZE AND CELEBRATE DIFFERENCES

of a degree of culture clash during an FLE, especially one that is international in scope. While your briefing packet should include a summary of potential differences between the exchanging communities, this may not be sufficient. For example, during a 2017 learning exchange between fishing communities in the United Republic of Tanzania and Madagascar, the Tanzanian delegation asked their Malagasy hosts some questions about the funding of their central resource management committee. Unbeknown to the Tanzanians, this was a sensitive topic, and as such threatened to create barriers between the two communities.

In situations like this, an impartial facilitator is particularly beneficial. Sensitive discussions can bring forth new ideas and solutions, but all too often risk causing conflict. An experienced facilitator will be able to recognize this and steer discussions in a direction that is beneficial to both parties without causing offence.

FIND THE RIGHT BALANCE FOR TRANSLATION

Another major challenge in any international exchange is translation. It's often the case that, despite your best efforts with participant selection, not everyone in the exchange party will share a common language. It's often tempting to let willing staff translate in situations like these, particularly where budget is a concern, but this is almost always a false economy. Translation is tiring, and staff are unlikely to be able to carry out both translation and their work obligations simultaneously. Furthermore, it may not be possible to find staff who can translate directly between the languages spoken during the learning exchange.

For example, during a recent exchange between coastal fishing communities in Mozambique and southwest Madagascar, the main languages spoken were the local dialects from each village. As such, one member of the party had to translate from the Mozambican dialect to Portuguese, another from Portuguese to English and a third from English to Vezo, the local Malagasy dialect.

This almost certainly meant that some things were lost in translation, leading to sessions running behind schedule and reducing the immediacy of communication between participants.

Therefore, it's definitely a good idea to invest in professional translation. But here too, things are not necessarily straightforward. The most efficient method is simultaneous live translation, where participants receive immediate translation through an earpiece. Simultaneous live translation can be difficult to implement in field contexts and can run contrary to the spirit of a learning exchange, which is supposed to be an informal, community-driven approach to knowledge sharing. Optimal solutions should be sought for your learning exchange.

08: DOCUMENT AND MEASURE

GARTH CRIPPS/BLUE VENTURES

Documenting and measuring the learning exchange is a vital step that is often overlooked. Both the communities involved and the NGO partners need to do some form of documentation, and how this is best achieved will be influenced to a certain extent by the objectives of the learning exchange.

COMMUNITY DOCUMENTATION

As covered in Step 6, the learning exchange should be documented in a way that allows the participants to share their experiences and knowledge with their own communities effectively. As much as possible, this type of documentation should be community-led. One of the most common methods is photography. Participants are given a smartphone or camera (if they don't already have their own) and asked to document their experiences. The participants can then work with their partner NGO to create a slideshow that tells their story in a way that accords with the objectives of the learning exchange. It's a good idea to also provide printed copies of the photos if possible, as it's likely that not all participants will have access to a screen or projector to display soft copies of their images.

Another effective method of documenting a learning exchange is participatory video. This involves members of an exchange party filming themselves and their reflections during the exchange and producing a summary video to show to their own communities. Participatory video can be very effective in formal community meetings where projection equipment is

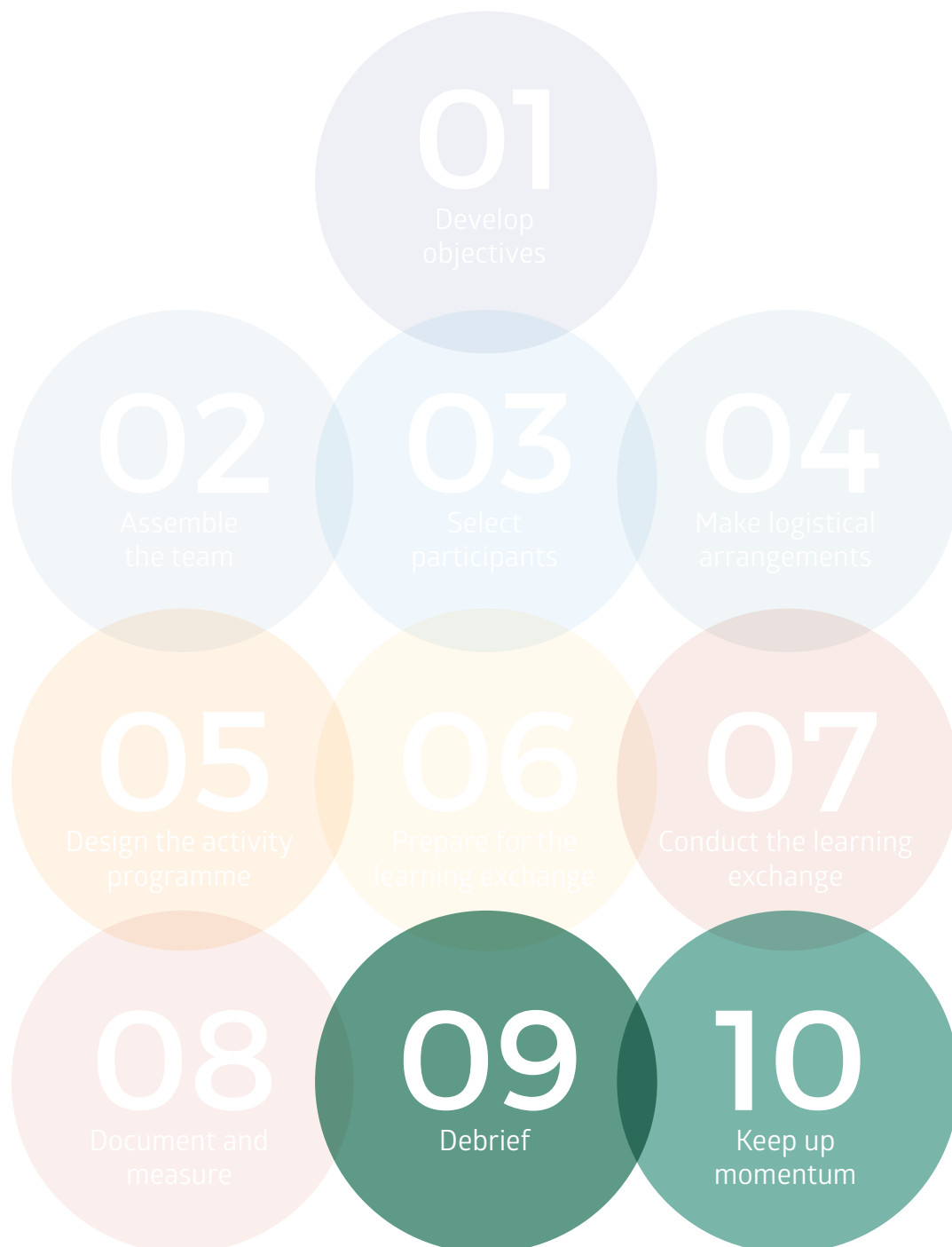available, but can be time-consuming and expensive to shoot and edit.

PARTNER EVALUATION

In many FLEs, the partner organization will need to formally document and measure the learning exchange to evaluate its effectiveness, and may also wish to communicate the conclusions and results of the exchange to its supporters.

Depending on budget and objectives, evaluation can range from a simple feedback form distributed to participants at the conclusion of an exchange visit, through to a scientifically rigorous survey programme that interviews a representative sample of participants (both before the learning exchange and at regular periods afterwards) to ascertain the extent to which any lasting behaviour change has taken place. Whatever you decide, it's important to avoid relying on obvious metrics such as number of participants when assessing effectiveness, as this will tell you little to nothing about how effective the learning exchange actually was.

Ultimately, an FLE is a complex set of processes and interactions. While detailed guidance on designing an evaluation programme is beyond the scope of this handbook, researchers from FLExCELL can be contacted for more information at info@flexcell.org

AFTER THE EXCHANGE

01
Develop
objectives

02
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the team

03
Select
participants

04
Make logistical
arrangements

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Design the activity
programme

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learning exchange

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08
Document and
measure

09
Debrief

10
Keep up
momentum

09: DEBRIEF

GARTH CRIPPS/BLUE VENTURES

FROM MOTIVATION TO ACTION

The hard work doesn't stop when the exchange visitors return to their own communities. Even if you've set a clear objective, selected the right participants, developed a programme focused on practical activities and one-to-one interaction, and fostered the perfect learning environment during the learning exchange, you'll only have succeeded in motivating the exchange participants to change their behaviour. How do you translate individual motivation into community-wide action? Here are a few pointers.

HOLD A COMMUNITY MEETING AS QUICKLY AS POSSIBLE

Have the exchange party ask the community to convene a meeting upon their return. The rest of the community will be wondering how the trip went, so this shouldn't be a challenging undertaking. At the meeting, have the members of the exchange delegation report back on the FLE, using the photos or videos you helped them create to tell their story. Hold this debriefing session as soon as possible, while the information is still fresh in participants' minds and enthusiasm is still high. Both will fade as days pass.

BRIEF THE SPEAKERS

To avoid the risk that speakers at the session will focus on what they did rather than what they learned, brief them beforehand and ensure that you are present at the meeting. Ask different speakers to talk about different things. The representative from the women's organization can talk about gender equity, for example, while the sceptic can focus on his or her objections and whether these were overcome.

DON'T DELAY THE DECISION

Once the speakers have finished, try to ensure that the community makes a decision. Aim for a commitment aligned with the objective of the learning exchange at this stage. Avoid the trap of having a community that is so enthusiastic that it wants to implement a new management or conservation initiative immediately, as any such initiative is likely to involve consultation with surrounding villages, as well as members of the community not present at the meeting. In addition, the community and its technical partners (where they exist) may need to first establish what the procedures or options are for devolving resource management to the local level. On the flip side, an outcome such as "we'll think about what we've heard and reconvene in a month" is similarly suboptimal, as motivation will inevitably fade over time.

DEBRIEF PARTNERS

While it's right to focus the majority of your post-exchange activities on the participating communities, don't forget to follow up with the other partner organizations. Convene the exchange committee to thank everyone involved and to thoroughly debrief. Summarize lessons learned to inform future efforts, and determine a focal point for each partner who can be contacted for further information and follow-up.

BEGIN IMPLEMENTING

If, after the debriefing sessions, all parties remain motivated to introduce a new measure from the FLE, then it's time to move forward with implementation. Best practices for this stage will differ between contexts to an extent, and will often require regular communication between all partners. You'll find a number of excellent resources in the "References and resources" section of this guide.

10: KEEP UP MOMENTUM

GARTH CRIPPS/BLUE VENTURES

If you want to maximize the likelihood that your FLE catalyses behaviour change over the long term, there are few extra activities you should consider.

REPEAT THE LEARNING EXCHANGE

To keep momentum high, consider repeating the learning exchange yearly or every two years. This creates an accountability partner for the implementing community. Affirming their commitment to transfer a model to their own community is one thing, but returning each year to a model community to report on their progress can keep them engaged and accountable.

COMMUNICATE REGULARLY

Ultimately, keeping up momentum will require the development of long-term relationships between exchanging communities, and this in turn relies on regular communication. Where communities are close to one another and share a common language, regular meetings for peer-to-peer troubleshooting and knowledge sharing should be encouraged. In other instances, web technologies like Facebook and WhatsApp can be leveraged to encourage regular conversation.

This is not always simple, however. In Madagascar, for example, a limited communications infrastructure has made it challenging to keep lines of communication open between communities beyond face-to-face meetings held during learning exchanges. But in situations where this has occurred, there have been several benefits, for instance enabling model communities to learn how others are transferring their approaches to their own contexts.

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CONTRIBUTING ORGANIZATIONS

STEVE ROCLIFFE/BLUE VENTURES

ABOUT BLUE VENTURES

Blue Ventures rebuilds tropical fisheries with coastal communities, developing human rights-based fisheries management approaches to sustain local fisheries and safeguard marine biodiversity.

Blue Venture's current models, which include aquaculture, efforts to unlock and market the carbon sequestration value of marine vegetation (blue carbon), ecotourism, integrated conservation and health programming, rebuilding fisheries, and locally managed marine areas, share a common theme of inspiring local leadership in marine management by demonstrating that effective marine conservation is in everyone's interest.

ABOUT FLEXCELL

Fisher Learning Exchange for Conservation: an Evaluation of Lessons Learned (FLExCELL) is a multidisciplinary research collaboration launched in 2013 to better understand the processes required to facilitate effective learning exchanges. A three-phase programme involving a network of FLE practitioners across 13 countries, FLExCELL's overarching goal is to identify and rigorously test FLE best practices and make them available to all. Efforts to date have focused on establishing a community of practice and conducting comparative case studies. Results have been published in a special issue of the journal *Marine Policy*, including papers on the history and scope of FLEs, key characteristics of successful FLEs, and guidelines for conducting an FLE (see "References and resources" section for details).

ABOUT THE FAO

Achieving food security for all is at the heart of the efforts of the Food and Agriculture Organization of the United Nations – making sure people have regular access to enough high-quality food to lead active, healthy lives.

The Organization's three main goals are: the eradication of hunger, food insecurity and malnutrition; the elimination of poverty and the promotion of economic and social progress for all; and the sustainable management and utilization of natural resources, including land, water, air, climate and genetic resources, for the benefit of present and future generations.

FISHERIES LEARNING EXCHANGES

A BEST PRACTICE CHECKLIST

BEFORE THE EXCHANGE

01

- CLEAR OBJECTIVES DEVELOPED
- BEST WAY OF MEETING OBJECTIVES SHARED
- FUNDING SECURED

02

- EXCHANGE COMMITTEE ASSEMBLED
- FUNDING SPLIT AGREED
- EXPENSES PROCEDURE AGREED

03

- PARTICIPANTS SELECTED IN ACCORDANCE WITH BEST PRACTICE

04

- PASSPORTS AND VISAS ARRANGED
- SCOPING VISITED PLANNED IF NEEDED
- HEALTH SCREENINGS FOR ALL PARTICIPANTS UNDERTAKEN
- TRAVEL INSURANCE PROCURED WHERE NEEDED
- HEALTH INSURANCE PROCURED WHERE NEEDED

05

- ACTIVITY PROGRAMME DESIGNED
- FEEDBACK FORMS CREATED
- LANGUAGE FOR EXCHANGE AGREED

06

- COMMUNICATIONS ACTIVITIES DECIDED
- FOLLOW-UP ACTIVITIES DECIDED
- FIELD STAFF BRIEFED
- BRIEFING PACK FOR PARTICIPANTS PRODUCED
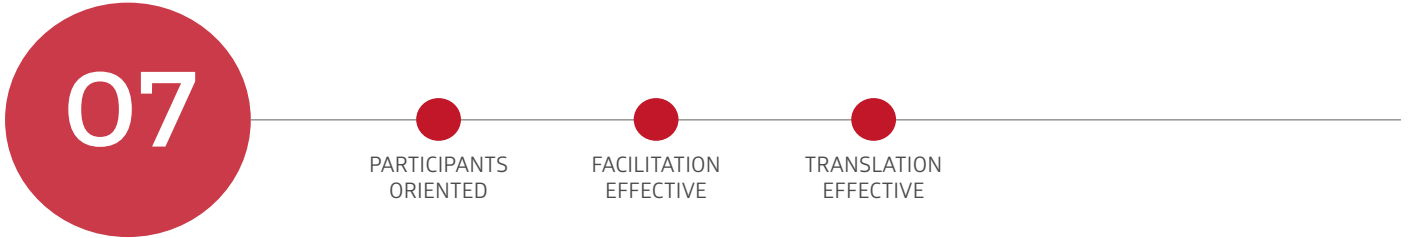
INTERNATIONAL
FLIGHTS BOOKED
IF NEEDED

NATIONAL
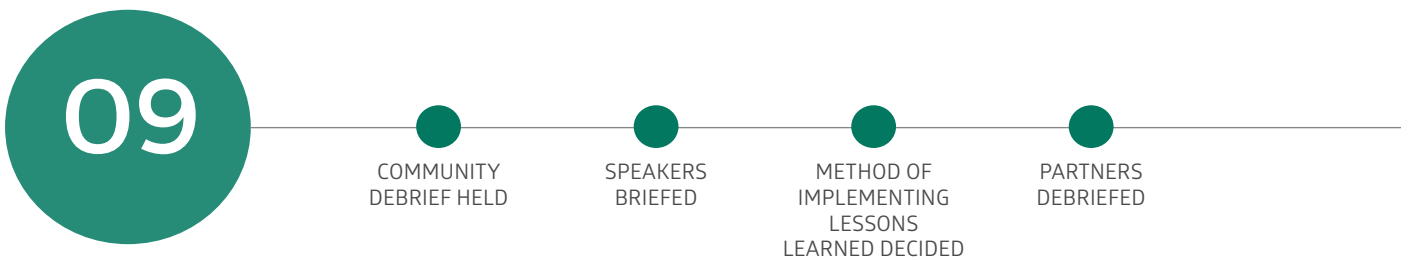FLIGHTS BOOKED
IF NEEDED

GROUND
TRANSPORTATION
ARRANGED

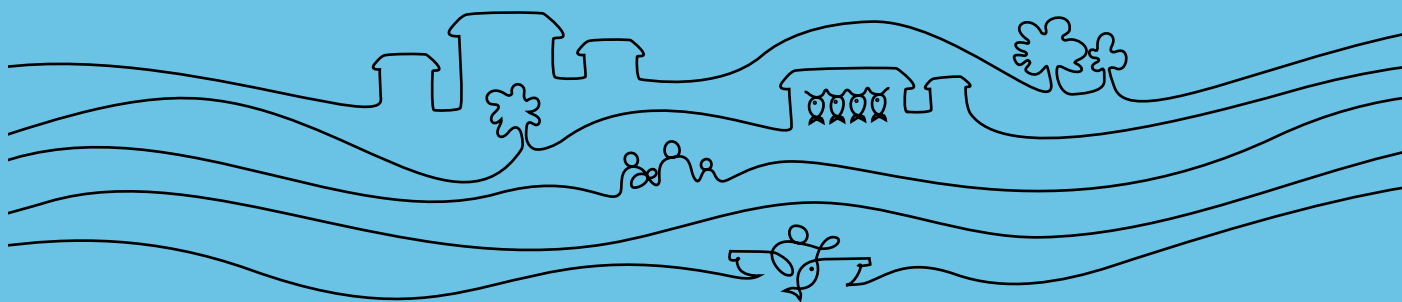TRANSPORTATION
TO AND FROM
AIRPORT
ARRANGED

ACCOMMODATION
ARRANGED

DURING THE EXCHANGE

07

PARTICIPANTS ORIENTED

FACILITATION EFFECTIVE

TRANSLATION EFFECTIVE

08

EXCHANGE DOCUMENTED BY COMMUNITIES

EXCHANGE MEASURED & EVALUATED BY PARTNERS

AFTER THE EXCHANGE

09

COMMUNITY DEBRIEF HELD

SPEAKERS BRIEFED

METHOD OF IMPLEMENTING LESSONS LEARNED DECIDED

PARTNERS DEBRIEFED

This handbook provides guidance on developing, implementing, evaluating and sustaining fisheries learning exchanges (FLEs). A collaboration between FAO, the NGO Blue Ventures and the research initiative FLExCELL, it draws on experiences from dozens of learning exchanges over the past decade to provide actionable, accessible advice and best practices.