# Guide to participatory processes for the LIFE INTEMARES Governance Strategy

2021

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# Executive summary

The sea is different. It's singular; it's another world. And so are marine protected areas. There is no private property. The seas are vast and diverse and host an amalgamation of competencies, uses, activities and specific regulations form those of local authorities to international bodies. All of this makes them truly unique with respect to protected spaces on *terra firma* and makes their governance a huge challenge to achieve efficient management.

This guide to participatory processes is framed within the **"Governance Strategy for the Natura 2000 marine spaces of the LIFE INTEMARES project"** and its purpose is to offer a working framework, proposals and tools that can be extrapolated to any protected marine area, to inspire and guide new management of the sea. A new model in which research and active participation in the sectors involved.

This guide is a useful instrument for technical personnel of the managing administration or related fabric, among others, who must lead, implement or supervise participatory processes, like the contents of the governance strategy to improve management of protected spaces. It is by no means a rigid guide, but a manual that might serve as guidance for the design and leading of these processes.

In each case, it is necessary to consider the specific characteristics of the protected marine area with their legal, budgetary and political limitations and opportunities, take advantage of the existing structures and capacities, prevent the dedication of necessary resources and incentivise through the empowerment and enabling of effective citizen participation.

The guide divides the processes into three phases, with a series of steps and actions and checklist for each to ensure that the objectives set are being met. It also contains the steps to establish an efficient Communication Plan and a Monitoring and Evaluation System that allows us to ensure the transparency and quality of the process. Over the course of the guide you can find different toolboxes with useful methodologies for research or the development of participatory processes.

Participation cannot be improvised. It must be designed planned and assessed in a methodical manner. Integrating the contents of the Guide into the participatory processes will allow enable better solutions to be obtained for the complex management of marine protected areas for the benefit of all society and the conservation of nature.

# Introduction

## About us

The LIFE INTEMARES project **"Integrated, innovative and participative management of the Natura 2000 Network in the Spanish marine environment"** faces the challenge of establishing the basis for efficient management of the marine spaces of the Natura 2000 Network and complete the works and advances driven in the framework of another project, LIFE+INDEMARES, which managed to take step forward in the declaration of new spaces.

To do that, a number of leading institutions in the fields of management, research and conservation of the marine environment have joined forces. Fundación Biodiversidad, under the auspices of the Ministry of the Ecological Transition and the Demographic Challenge, coordinated the project. Participating partners include the ministry itself, through the Directorate General for Biodiversity, Forests and Desertification; the Regional Government of Andalusia, through the Regional Ministry of Agriculture, Livestock, Fisheries and Sustainable Development; the Environment and Water Agency; the Spanish Oceanography Institute; AZTI; the University of Alicante; Universitat Politècnica de València; the Spanish Fisheries Confederation; SEO/BirdLife and WWF-Spain. It also benefits of the contribution of the LIFE Programme of the European Union.

## Why promote participation in the Natura 2000 marine network[1]

- **Participation is democracy and democracy is participation.** Planning and management open to points of view of stakeholders are highly desirable from a democratic perspective. The participative planning and management experiences suggest that participation can contribute to better efficacy and efficiency in the management of protected areas and conservation projects.
- **Participatory processes are valuable and necessary tools** that allow for better diagnostics, encouraging the examination and verification of different points of view and enriching the quality of decision making for the efficient management of the Natura 2000 marine network (RN2000 marina)[2].
- **The concept of "governance"** places the emphasis on the urgent need to build networks of participation and dialogue, conflict resolution and decision making to search for more appropriate and efficient solutions for the complex management of marine protected areas.

1 Inspired by the reflection of F. Pindado, Sub-Director General of the local sphere of the Regional Government of Catalonia (2004-2013) and author of various publications.

2 Participative planning of protected areas: Benefits and challenges. Heras, F. Red Natura 2000 marina en España. LIFE+INDEMARES, 2014. WWF/Adena.

# What's this guide for

This guide seeks to provide guidance on the design of the various participatory processes to accompany the development and implementation of the Governance Strategy of the marine Natura 2000 Network in the different territories of Spain. For example, in the creation of a new marine protected area (MPA) in the evaluation of governance structures, or the development of instruments, plans or management measures. It is also intended to serve as inspiration for any other protected space or marine conservation project (or even terrestrial) both in Spain and abroad.

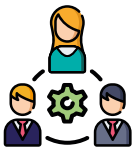
**Participation is not improvised, it is designed and planned.**

Design and planning allow us to foresee difficulties, allocate resources, instruments and measure or channels appropriately at different moments and respond specifically and efficiently t o a problem or need based on the situation and the context. This fosters quality and transparency of the process and, at the same time, improves the relationship between people, users, and managers to guarantee maintenance or the re-establishing of the favourable state of conservation of different types of habitats and marine species.

# Who is this guide intended for?

**Technical personnel for planning of natural spaces** performing advisory local consulting functions.

The **government teams** who make the social participation policy a reality and the management of governance model for MPAs.



**Technical personnel of the administrations** competent for planning, management and conservation policies for MPAs.

**Technical personnel involved in participation, facilitation** and responsible mediation of design and development of participatory processes.

The **collaborative fabric** in general, informal collaboration networks and citizens.

**Users and sectors of the economy** present in marine protected areas.

**Citizens' organisations** for the conservation of the natural environment and natural, cultural and social heritage.

# What is the governance model of the LIFE INTEMARES project?

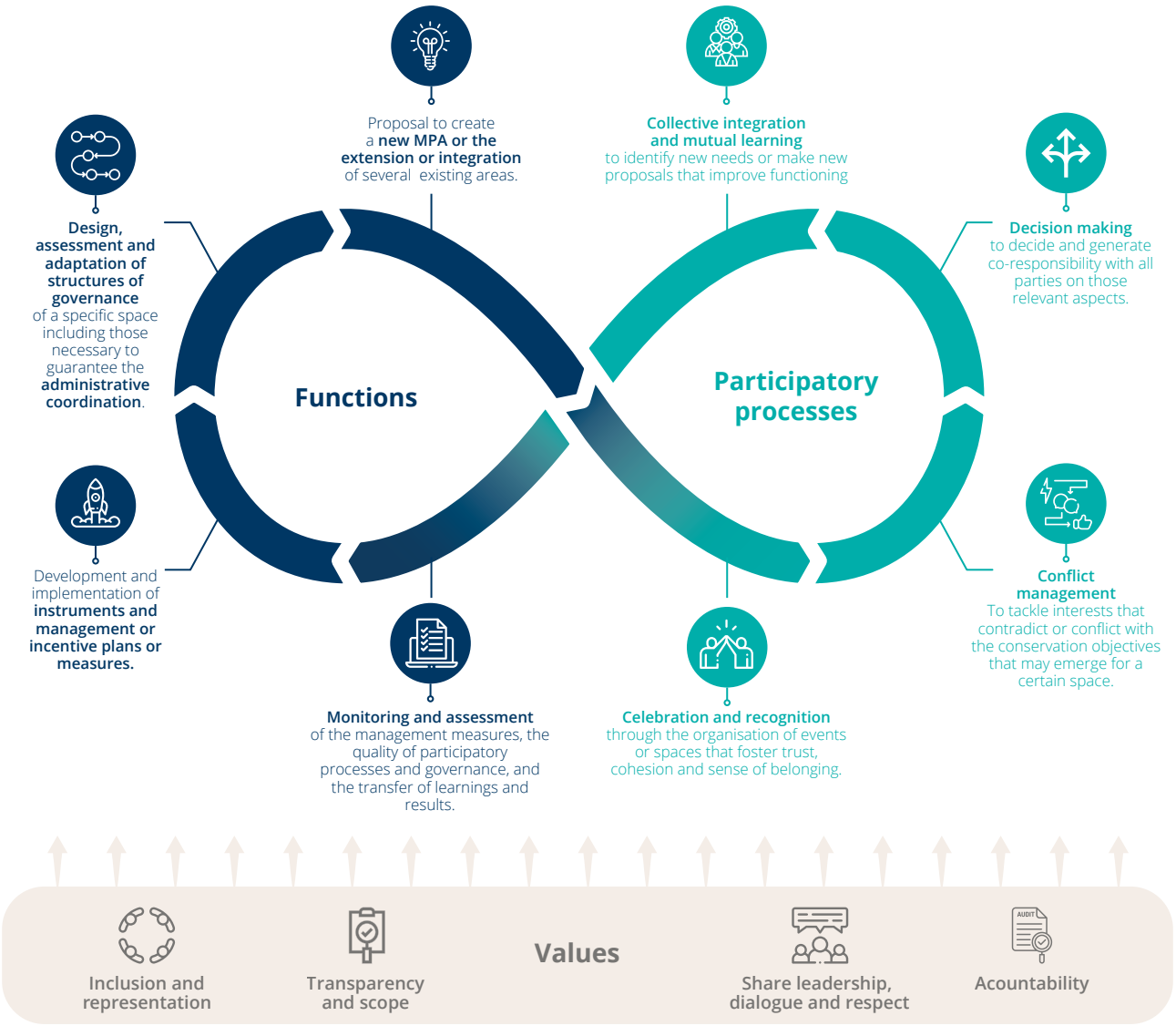
Marine governance refers to **all those mechanisms, processes and rules through which people or sectors and their different interests and effects on the marine environment have been managed:**

- In the framework of the Natura 2000 Network, governance must ensure compliance with the conservation objectives and measures established and the coherence ensured between management, coordination, communication and exchange of experience between difference spaces of that network.
- At local level, it must contribute significantly to the search for solutions for compatibility between the uses and activities of a certain space with natural values present and for which the different types of protection were granted by the Member States of the European Commission (SCIs, SACs or SPAs).

The strategy makes it clear that what is required is an institutional structure that responds to the characteristics and needs of each territory, facilitating the integration of the stakeholders involved in the collective processes in the planning, research and learning, and the decision making and the management of conflict. It also detected that it is necessary to foster recognition of the marine space, a sense of belonging with it, and to articulate processes for the celebrations of the achievements made.

The model of the governance strategy is established on the basis of values that must impregnate all actions. At local level, it is developed on the basis of governance bodies and structures created according to the needs of each territory which performs a series of **essential functions** through **participatory processes for four main purposes.**

**The governance strategy of LIFE INTEMARES has shown the considerable demand for greater participation among all Stakeholder groups on the management of Natura 2000 network funds. There are calls for more horizontal decision-making processes and, ultimately. A more open model of governance of marine protected areas.**




## Values

- **Inclusion and representation:** all people and organisation linked to the MPA are actively present in the processes and have access to the participation, ensuring a weighted and legitimate representation that includes minorities and marginalised sectors or those who experience difficulty participating, affording them the time and resources necessary.

- **Shared leadership, dialogue and respect for diversity:** democratisation of the processes and care for people and relationship in spaces in spaces with periodic interactions, providing confidence, collaboration, shared responsibility and balance and justice between all stakeholders, prioritising the conservation of marine biodiversity.

- **Transparency and scope:** clearly state the scope of the processes, and how to make the documentation and assessment systems of governing processes and actions accessible, in the spirit of mutual learning and ongoing improvement. It should also foster the dissemination of information, the exchange and transfer of knowledge and experiences, and the creation, strengthening and consolidation of networks.

- **Accountability:** with mechanisms for the assignment of responsibilities and commitment in accordance with the scope of action, establishing monitoring of agreements and disagreements reached and informing of the consequences of policies.

## The essential functions of the bodies and structures of governance

- The proposal to **create a new MPA** (whether marine N2000 or other form) or extension or integration of several existing areas.
- The design, assessment and adaptation of the **governance structures** of a determined space including those necessary to guarantee administrative coordination.
- **The development and implementation of the instruments plans or measures of management measures and incentives** of a certain space.
- The **monitoring and assessment of management measures** (implementation and results according to the objectives defined), the quality of the participatory processes and governance, and the transfer of learnings and results.

## The four purposes of the participatory processes[3]

- **Collective research and learning is mutual:** to identify new needs or make new proposals that improve the functioning of the space both at management and participation level, and transparency, involving science, organisations and people with traditional local knowledge, socio-economic sectors, public administration, etc.
- **Decision making:** to decide on and generate co-responsibility of all parties on those relevant aspects in the sphere of action of the MPA, whether it is in relation to the objectives and measures provided for in the management instrument of other spheres of communication, monitoring or assessment of the process.
- **Conflict management:** to tackle those conflicts or interests that may arise that are contradictory or contrary to the conservation objectives for the space, to turn them into sources of learning and opportunity for social improvement at both the sectoral and institutional level.
- **Celebration and recognition:** Through the organisation of events or spaces that foster confidence, cohesion sense of belonging to the marine protected area, and the celebration of achievements and meeting targets.

3 Based on https://iiface.org/wp-content/uploads/2015/09/Modelo-efectividad-grupal.pdf

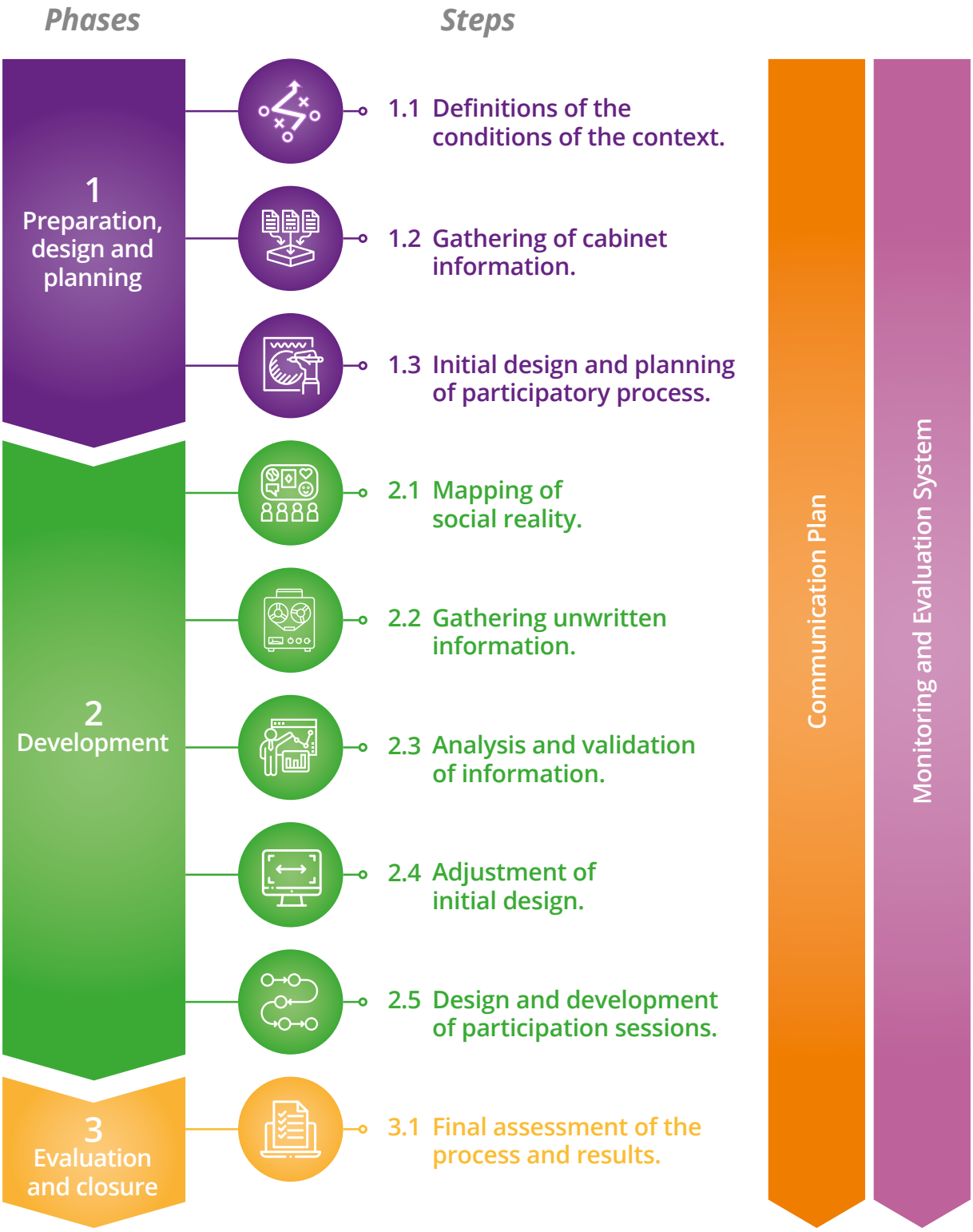
# Design of the participatory processes for marine protected areas

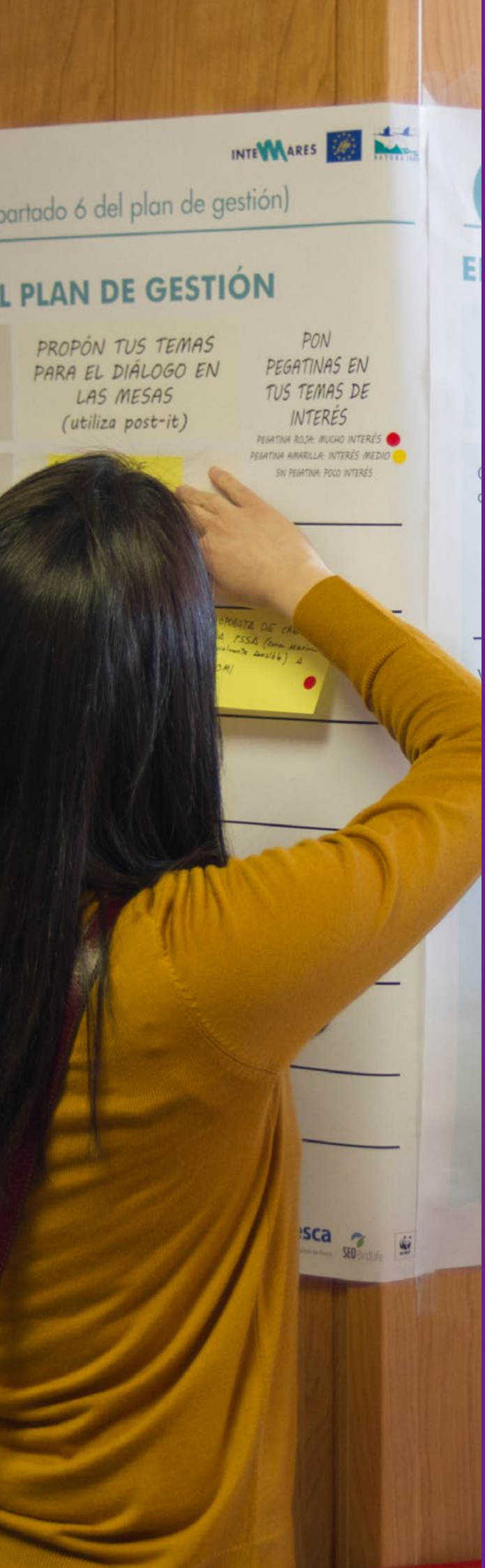
To guarantee the quality of the essential functions of the governance structure of each MPA, the participatory processes must be designed with consideration for the phases of preparation, design, development and assessment, encompassing the different steps. These steps should not be taken as a rigid structure to be followed to the letter in the exact order. Rather, it should be considered a list of actions to check if they contribute to reaching the objectives of the process in each specific case and if so in what way.

**Prior considerations for efficient participatory processes:**

- **Clarity and relevance of objectives:** the coherence, transparency and clarity around what we want to achieve with the participatory processes is fundamental to avoid generating false expectations.
- **Consensus:** the greater the consensus around the need, objectives and methodologies of a participatory process (from the political, technical or social spheres) the greater the possibilities of success.
- **Leadership:** although an steering group coordinates the process, shared leadership ensures plurality and transparency.
- **Political will:** seek out political recognition and backing from the start of the process, so that results are institutionally legitimised and implemented efficiently.
- **Involvement:** gather different discourses, knowledge and sensibility on society including perspectives often not considered (such as gender and migrant communities), ensuring plurality and strength of the process.
- **Integration with other participation systems:** coordinate with existing participation bodies and structures in the territory so as not to duplicate efforts or saturate the people and organisations involved.

Displayed below is a scheme of the phases and steps to be developed later on:






# Phase 1

# Preparation, design and planning

1

# Step 1.1. Find out the context and define the rules of the game

## What for?

To have an initial idea of the set of circumstances surrounding and that can condition the process, allowing us to outline the lie of the land and the rules of the game when we have a little information.

This includes starting to define the obligations, limits and commitments of those promoting the process.

## How?

By defining and agreeing the scope and limits of the process in accordance with following seven aspects, based on the preliminary information available when it was initially envisioned. Much of this information will be subsequently complemented and validated over the course of the process.

- **Task and motivations [Why?]:** Clarify the reasons why it was decided to initiate the participatory processes and the reasons why the social stakeholders decided to get involved.
- **Aspects to cover [What?]:** Define the aspects or issues to be covered within the participatory processes.
- **Objectives and results sought [What for?]:** Establish objectives that are concrete, measurable, relevant, realistic and delimited in the time possible. The expected results may be tangible (achieve conservation objectives, draft a management plan, introduce improvements to the governance model, etc.) or intangible (like the majority of institutional relations or among the stakeholders, the improvement of knowledge, the growth of a culture of participation in the Natura 2000 marine network, etc.).
- **Participants [Who?]:** Decide if it's a process open to any person or stakeholder with an interest or restricted to those who meet pre-established criteria or are expressly invited. In both cases, the attempt should be made to reflect the diversity present in the territory including vulnerable groups, such as migrants who work in coastal areas close to the MPA.
- **Scope of level of participation and transparency of the process [To where?]:** It is necessary to agree the level of participation to invite people and organisations into the process and clarify the influence their contributions will have, and the manner (method of decision making, terms, etc.) in which they are to be handled (whether rejected, modified or accepted) and how they will be informed. The ideal situation would be for the level of participation proposed to correspond with the interest and commitment of the participating people and organisations.

- **Existence of other processes and/or projects that include participation [Is there anyone there?]:** Coordinate to establish potential synergies, taking into account whether they are planned or in progress, and if the objectives are sharedor related. This will prevent tiredness or overburdening when the same people are involved, while allowing for the optimisation of the processes and greater efficiency.

- **Resources available and temporary terms [How much and when?]:** Clarify that resources are available for the development of the participatory process at human, economic, spatial, temporal, material, technological level, etc. This way we'll know what margin for manoeuvre and terms we have to start with.

# Step 1.2. Gathering of cabinet information

## What for?

To have the best information available in relation to the subject matter of the process, or the local reality or social context, and to evidence and resolve possible shortcomings (historical background, possible obstacles/resistance and support for the activity, vacuums of information important to the start of the process, etc.).

## How?

Making a search and review of the official documents and the bibliography according to the subject matter of the process, at both scientific and legal level, reviewing databases, archives and other information available in traditional and alternative media.

The search and bibliography should also consider the existence of Guidelines and Strategies at European, National and regional level and reports on the existing participatory processes in the area linked to the subject or space in question here.

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# Step 1.3. Initial design and planning of the participatory process

## What for?

To have a document that guides that guides the process and provides clarity on the necessary steps for its development, and how to communicate with whoever necessary from the outset.

**Preliminary design with information available at the start of the process, which must be adapted and/or readjusted with the learnings in the following steps**

## How?

The design of the process can be made more or less participative depending on the conditions of the context, where possible:

- Agree the design of the process with a legitimate representation of the people or organisations involved.
- The promoters or technical tram contracted must put forward an initial design proposal that will later be presented and, ideally, validated with the population involved.

In both cases, **the design must integrate the spaces of regulated participation**, where these exist in legislation, prior public consultation, public hearing, and include to the steps for the processing with all regulatory bodies (Committees, Councils, etc.).

The design will include a series of elements linked to the conditions of context:

- In relation to the **scope** of the process:
  - The subject, objectives and results expected from the process.
  - The rules, standards, legal limitations established.
  - The definition of the **steering group** of the process.
  - Accountability mechanisms.

### What is an steering group?

It's a team with the responsibility to coordinate the design and implementation of the participatory process. The group, ideally, will include the participation of key social stakeholders through their representatives, providing transparency and credibility to the process. Those who invite other relevant stakeholder are the ones that drive the process.

If the politicians responsible are not the ones who start the process, it is important to invite them and for them to participate from there on for the most successful outcome. It is also recommended that there be an expert person/ organisation in the design and development of participatory processes. A format and frequency will be established. For design meetings, along with a methodology for development.

- How will the calls be run (open or closed) and the selection criteria for participants.
- A transparent commitment on the integration of the results of the process of participation in the formal decision making system. Some options include:
  - Formal adoption of the agreement reached by agreement, resolution, royal decree, etc.
  - Commitment of authorities to meeting the agreements reached in the participatory process for decision making, justifying the rejection of proposals for a grounded public response.
- The information and resources (human, economic, spatial, material, technological, etc.) to be used in the participatory process.

In relation to the organisation of the process (with the information initially available):

- What actions will be developed in the next steps after initial design (interviews, consultations, workshops, public information periods technical committees and working groups, etc.) providing important information for the adjustment and adaptation of the initial design to adapt to new realities and limitations.
- What methodologies are used for these actions (if qualitative, quantitative, face-to-face, virtual, etc.). The methodological design of each action specifying the techniques and working dynamics used in the next step (Step 2.4).
- Estimate the total duration of the process and integrate the steps in a timeline.

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- Begin to outline a **Communication Plan**.

## Communication Plan

Communicating from the outset provides clarity, transparency and trust to the people and organisation involved, while also helping to manage expectations of the process.

The communication is geared towards the stakeholders, both individuals and organisations, from the surroundings of the MPA with the objective of keeping them informed on the process, new issues, subject matter and agreements adopted at different moments, whether involved or not. The Plan will allow us to maintain the flow of information and return of results.

An efficient communication plan must establish:

**Content:** What can be communicated and what can be considered confidential.

**Responsible:** Whoever is responsible for drafting communication contents.

**Audiences:** what are the different audiences these messages must be targeted (results of social mapping with a good base, differentiating the media from the rest of the stakeholders, bearing in mind that the general public does not exist).

**Communication objectives:** both general and specific, established based on the audiences identified.

**Messages:** General and other more specific messages will be drafted for each of the audiences identified.

**Timeline:** with the communication actions, reflecting the most important and most delicate moments of the process, in which it is necessary to ensure transparency and participation.

**Resources:** human, material and technical resources we need and what's available.

**Tools:** website/blog, email bulletins, leaflets, physical posters, social media, local and regional media, reports, etc.

- Begin to outline a **Monitoring and Evaluation system** for the process to deal with the situations that may arise and a flexible response to adapt to same.

### Monitoring and Evaluation System:

A participative process in which people and organizations are involved needs to generate a system to monitor design and the actions to be taken. Not only to establish if each of the tasks committed to are carried out and to evaluate the results but also to give the process more resilience, adaptability, sense of unity and a common vision.

Performing continuous evaluation that will flexibly adapt the process to the reality and a context that is usually complex, uncertain and changing. Also to assess the quality of

the process, the results and the impacts expected. It will be easier to achieve success in participative processes and, consequently, the conservation objectives.

An efficient monitoring and evaluation systems must establish:

- What information it is considered important to evaluate and adapt to the participatory process.
- How this information will be collected: minutes or summaries of meetings, reports on participation sessions, surveys, interviews, an email mailbox for suggestions, etc.
- Who will receive the information.
- How the information will be analysed: with a schedule of periodic meetings (monthly, quarterly, etc.) of the steering group, if there is one, and/or larger meetings in which the vision of other people involved in the process or other relevant perspectives are taken on board.
- How are the results of monitoring incorporated into the participatory process?
- How are the results of monitoring and evaluation communicated to the different stakeholders of the MPA (in the Communication Plan).

Before going any further, it's evaluation time...

## Phase 1 checklist:

**Step 1.1. Conditions of context. We have...**

- A list of reasons for which the process was initiated
- Expected results.
- Objectives of the participatory process, concrete, measurable, relevant, realistic and delimited in time, to achieve the expected results.
- Subjects to cover in the participatory process.
- Criteria for who's going to participate in the process.
- Agreement on level and scope of participation.
- Budget and dimension of the process in human, temporal and economic terms.
- Measures necessary for the development of the participatory process.

**Step 1.2. Gathering of cabinet information. We have...**

- The information relevant to the process (bibliography, websites, etc.).
- Access to this information for participants

**Step 1.3. Initial design and planning. Design includes...**

- A consensus document with the initial scope, design and planning of the process (needs, interests, commitments, etc.).
- The formally regulated spaces of participation, in the event they exist in the legislation.
- Aspects of the scope of the process (rules and legal limitations; definition of an steering group; accountability mechanisms, the nature of the calls for participation, selection criteria for participants; commitment to scope of the participatory process).
- Aspects of the organisation of the process (actions, methodology and timeline).
- Gender perspective.
- An inclusive focus on the diversities present in the territory (age, socio-economic level, culture, language, origin, nationality, etc.).
- An outline of the social map or analysis of stakeholders.
- An outline of the Communication Plan.
- An outline of the Monitoring and Evaluation System

# Phase 2
# Development

2

# Step 2.1. Mapping of social reality

## What for?

To identify the main parties and groups who are affected by, and involved in, directly or indirectly, the process to be developed. This makes it possible to ascertain and consider their skills, interests, needs, perspectives and expectations and also the existing relationships that might influence the process.

## How?

A series of steps can be followed to better represent and understand the complex social reality:

- **Clarify the objectives of the map:** what information we want to obtain and why. For example, for the drafting or updating of a management plan, know which activities and uses there are of a space.
- **Define the variables to be considered to describe the stakeholders**, including their professional activity, their use of the space and socio-economic (gender, age, income level, etc.) or cultural variables (level of study, etc.).
- **Identify the relevant stakeholders, collect information on them and analyse their relationships according to the points of interest for the process:** this analysis allows, among other advantages, evaluation of the viability of the process based on the level of support for it identifying where the main conflicts arise. It also enables analysis of the nature of the predominant relationships between the stakeholders (collaboration or conflict) or identify possible alliances for collaboration and the stakeholders potentially affected positively or negatively, etc.

**To be taken into account in the Communication:**

### The importance of communicating from the start

At this point, we have sufficient information on the context, the rules of the game and the initial design to begin communicating the process externally. In the **"communication launch"** it is necessary to inform the promoters and managers, and to share the information obtained in the first phase (conditions of context, initial design, etc.).
This is key to provide transparency and confidence in the process

This can be done **through some of the following techniques and tools:**

| Tools | When to use them |
|---|---|
| **Snowball** | To identify potential participants or relevant stakeholders in the process that are not easily identifiable or are few in number. Individual stakeholders are asked to voluntarily identify other potential participants they know. |
| **Sociograms** | To ascertain how the different agents and their relationships may be influencing the reality we face, especially to identify the elements where it would be important to intervene. |
| **Matrices of influence, power and interests** | To identify those stakeholders who are in favour and provide information and incentives to bring those who are not but whose interest could rise over the course of the project, closer. Similarly for those who do have a great interest but who lack power and influence. |
| **Emotional maps** | To get close to a vision of the managers and users of the space from the perspective of their experiences, using their knowledge (feelings, attachments, etc.). |
| **Barometers** | To expose and evidence the starting position of each party and, to start with, ascertain the arguments and discourses within a group. |

**To be taken into account in the Communication:**

In the interest of transparency, it is recommended to make the stakeholder analysis public, with the consent of the people or organisations involved. This also helps identify new relevant stakeholders yet invited, to incorporate them into the process.

**Monitoring and assessment:**

This mapping of key stakeholders, both individuals and groups, could enrich the initial design insofar as actions could be included that are geared towards the development of capacity for dialogue or that can empower the common points of interest across different positions, strengthen vulnerable groups, etc.

# Step 2.2. Gathering of unwritten information

## What for?

To analyse the level of interest in an issue, completing field work and listening that enables us to ascertain the discourse of certain people or groups on a subject, identify the level of knowledge or collect specific information on an issue of interest, gathering ideas, characteristics or specific facts.

To identify the points of view and positions of different profiles and social or economic groups.

To provide information in addition to social mapping, which identifies how stakeholder may accompany or obstruct the process or which may influence the public opinion of the community.

## How?

The selection and design of the tool, and the manner in which in which the information is gathered (in person, over the telephone or intent) must be appropriate to the objective, considering the specifics of the issue in question, the time available, the sectors involved, etc. **Some tools to compile unwritten information:**

| Tools | When to use them |
|---|---|
| **Semi-structured dialogue** | Defining various aspects of the issue we want to tackle, through open questions. |
| **Individual or group interview** | With open but specific questions. |
| **Discussion groups** | Among people with certain sociological profiles, to explore the existing discourses on a subject in greater detail. |
| **The Delphi Methodi** | Where a group of experts in a subject respond individually to a series of questions interspersed with feedback on the group's statements. After successive rounds, a consensus opinion of the group is obtained. |
| **Surveys and opinion polls** | Through questionnaires with open or closed questions to obtain information on citizens' opinions on matters that require detailed information or are not well known. |

**To be taken into account in the Communication:**

In this step, the involvement of people and organisation identified as key stakeholders as part of the mapping is important, to inform them about the process and invite them to participate through the publication of news, dissemination on social media and the drafting of leaflets on the process. It is also recommended to complete a return of the results obtained up to that point.

**Monitoring and assessment:**

The information that emerges at this point can be relevant and can lead to the adaptation of the initial design, making subtle changes, reorienting it or, if necessary, incorporating new actions.

# Step 2.3. Analysis and validation of the information

## What for?

To be able to present and validate the information gathered and the analysis with stakeholders who participated in the collection or with the local population, providing a reflection or joint diagnosis. This also allows for new contributions in line with the reflection or description of the reality or context of the process, the problems, expectations and potentialities, so that the steering group can readjust the initial design if necessary.

## How?

Can be carried out by the promoter group or on a more collaborative basis with key people or organisations through workshops or working groups.

There are different techniques that can be combined in the sessions to be designed in a participative workshop format. These techniques allow us to understand the information and it can be used in both cases, including:

| Tools | When to use them... |
|---|---|
| **Timeline** | To analyse the history of a process or subject and the influences or factors that have led to its current state. |
| **Analysis of textual phrases** | To collect a series of textual phrases that represent all the important positions at play. |
| **Mental or conceptual** | To visualise the flow of thinking on a specific issue. |
| **Venn diagrams** | To understand the interactions and links between variables or organisers. |
| **SWOT Matrix** | To analyse the status quo and the potential of the case analysed, considering the context and internal atmosphere. |
| **Pros and Cons** | To reflect on a subject that appears to present contradictions or to analyse the advantages or disadvantages of an option or subject. |
| **Six thinking hats** | To focus on an issue in and orders way from different thinking approaches: emotional/ intuitive, positive, creative, critical, facts/background and integrated. |
| **Conflict analysis matrix** | To analyse the different areas of a conflict that occurs around a subject. |

**To be taken into account in the Communication:**

As for the analysis, it is recommended to hold a more or less open call for all individuals and organisation interested, sharing the objectives starting information and methodology, and the date and time providing sufficient notice. The results should be disseminated for final validation through informative events and written reports or public events

**Monitoring and assessment:**

The results of this step and the previous ones are essential to adhere to the process and put in place the subsequent actions. In this step, it is necessary for the participants to know and legitimise the next steps, taking advantage of the opportunity to review the social mapping also, in case any of the participants miss other entities or interests not considered up to that point.

# 2.4. Adjustment of initial design

## Readjusting the process?

On this point we would have sufficient information to readjust the next steps of the participatory process. This can be done in a more participatory manner (a shared decision with participating stakeholder) or less so (decision taken by technical staff or specialised consultant).

The adjustment of design will affect the communication plan, which should foresee how to transmit these actions to the people called with sufficient notice, to facilitate the participation of all stakeholders.

At the same time, the steering team will prepare a brief technical document setting out the motivations and the changes made to the design, and which will be published along with the rest of the reports and papers for participation.

The adjustment of initial design includes:

- What type and number of actions are to be called (e.g. 25 individual telephone interviews, four online discussion groups, two multi-stakeholder workshops for face-to-face participation, validation of documents by committees, etc.).
- A timeline with the start and end dates, and the different intermediate actions.
- A proposal for locations, dates and specific times considering accessibility criteria (both for physical spaces and for virtual spaces) so that a process can be more inclusive.

**Monitoring and assessment:**

# Step 2.5. Design and development of the participatory processes

## What for?

- To develop the specific design of each session or event (meeting, workshop etc.) planned in the overall design of the process.
- So that, based on the previously defined definitions, each session or event has a solid agenda with subjects, times, techniques, tools and working dynamics to use.
- To give quality to the process and generate safe, inclusive and production working methodologies.

## How?

Through techniques and working dynamics that facilitate the analysis, research, deliberation, creation of propositions and decision making, which brings about the participation of different stakeholders and the achievement of the expected results, while at same time caring about the results and interpersonal or related aspects.

To generate sustained participatory processes over time it is necessary to care for the emotional bond and the interpersonal relationships at all levels and at the same time strengthen the connection of the people with territory.

As set out in the scheme on page 5, the ends of each session may vary depending on the type and characteristics of each process and the design. On the following pages, each of these purposes is explored, along with different approaches and techniques for tackling them.

### Participatory processes

**Collective research and mutual learning**
to identify new needs or make new proposals that improve the functioning.

**Decision making**
To decide and generate co-responsibility of all parties on relevant aspects.

**Conflict management**
To tackle interests that contradict or conflict with the conservation objectives that may emerge for a certain space.

**Celebration and recognition**
through the organisation of events and spaces that foster trust, cohesion and sense of belonging.

# A. Collective research and mutual learning

When participative planning is the cornerstone of the management of natural spaces, it should start with collective research processes.

## What for?

- To propose objectives for the plan s or other management instruments that regulate a space, fostering dialogue between the participants and combining their knowledge (scientific knowledge, local knowledge, organised civil society, productive sector, public administration, etc.).
- To gather information and better understand a question (e.g. How the declaration of a new MPA is going to affect us).
- To generate ideas, create new options, innovative proposals... (e.g. What incentives can we propose for a more sustainable management of the MPA).
- To project the future, dream, open up to change (e.g. how you imagine the activity of x in the new MPA).

## How?

Through techniques based on keys like creativity, divergent and convergent thinking, and the synthesis, the appreciative look and the critical look, non-linearity, welcoming the diversity of perspectives and rebalancing the possible differences between participants.

That requires:

- That the issue in question is important at this time for the group called, generating diverse perspective and has no pre-designed solution.
- The design of a methodology or structure suitable for the work to be developed, as the group can. The following table shows some participative techniques that can be suitable for this moment.
- For the opinion of every participant to be heard equally, affording them the same importance as anyone else.
- For the results of the research to be collected or “harvested” clearly and concisely before closing the space, defining the next steps clearly in relation to them.

| Techniques | What situation to use them in... | Allows for... | To find out more... |
|---|---|---|---|
| **Shared vision - appreciative research** | To create, between several social agents a shared vision of the future of a territory, subject, etc. | A shared horizon that drives or brings together the other actions. | La indagación apreciativa: una metodología de Desarrollo Organizacional para el cambio en la empresa |
| **Future scenarios** | To reach the share objectives and agreements on questions relating to the problems facing the community and its future development. | The participation and debate between population groups with diverse needs or interests. | Escenarios de futuro |
| **Café diálogo (World Café)** | To ensure a flowering of the creativity of the major groups and debate around the important issues before moving on to planning. | Create "live networks" of collaborative dialogue: people move in rounds of conversations, connecting ideas and passing along information and learnings. | Café para llevar! Una guía rápida para ser Anfitrión de World Café |
| **Open space** | To generate creativity, innovation and collective construction in meetings with a numerous affluence, in which different groups of people have to manage complex and potentially conflicting information. | The simultaneous deliberation in small groups, making it possible for each person to dedicate their efforts and attention according to their concerns, interests or skills. | Tecnología de Espacio Abierto (Open Space Technology). Guía del usuario |
| **Circular groups (Philips 6.6)** | To obtain quick decision, partial agreements, suggestions for a process, proposals etc. | Look for creative solutions and proposals, sharing the differences or similarities between the participants. | Hacer talleres. Una guía práctica para capacitadores |
| **Simulation game** | For an initial approach to the subject or the problem, and the different interests at play, reducing the complexity of the situation. | Trial decision making in prior phases, attempting to reach results through dialogue and debate. | Guía práctica para facilitar la participación ciudadana. Una selección de herramientas presenciales y digitales para el trabajo colectivo |
| **Fishbowl** | For the broad participation of the group to be feasible in the discussion of a complex subject or debate. | Active listening and reflection on others' arguments.<br>Allows for the consideration of many points of view, observing and reflecting on the arguments. | Hacer talleres. Una guía práctica para capacitadores<br><br>La pecera |

# B. Decision making

## What for?

- To include a diversity of voices in those decisions concerning multiple agents, ensuring minorities are taken into account and not ignored.
- To increase the quality of decisions taken, incorporating the knowledge and experience of all existing perspectives.
- To foster a culture of participation in matters of public interest.
- To increase the buy-in from the different stakeholders in terms of decisions, and their commitment to the implementation.

The Governance strategy promotes collective decision making to respond to the people affected by it or who benefit from it. In the organisational structure defined in each marine protected area, every element will have clear functions and competencies, so that every type of decision will be taken in the right place (principle of subsidiarity). This allows for the ordered participation in decision making, without falling for the myth that "everybody decides everything".

## How?

It is necessary to have clarity on the different types of decisions that must be taken and agree who decides what and how.

- **Strategic goals**, to define the general objectives and the media to achieve them, with extensive long-term commitment.
- **Organisational tactics** for the implementation of strategic decisions, planning materials and resources and organising aspects or parts of the strategy.
- **Operational**, to decide on frequent and repetitive operations with a short-term horizon.

**The greater the importance of the decision, the more important it will be to promote greater participation to reach agreement and commitment**, in a manner that the strategic decisions must be taken in processes with greater participation and time, while the operation will be taken in small groups and working groups or will be delegated to individuals responsible.

A space for decision making should always have:

- Basic agreements on functioning, including the use of participation and facilitation staff.
- An inclusive call for participation, in a suitable space and with a visible agenda, shared in advance, that's open and clear in terms of what to do and what is going to be talked about and decided.

- Proposals or that are well-informed or drafted in advance in research spaces.
- Agreement on the method of the decision (voting, consensus, etc.) and if there is a minimum quorum to make the decision.
- Transfer actions, adoption of commitments and next steps to take.

| Methods | When to use them | Allows for... | To find out more... |
|---|---|---|---|
| **Consensus** (see lower panel) | For strategic and perhaps organisational/tactical decisions. | Better support and commitment to implementation of the decision take by participants. | Guía al proceso de consenso |
| **Qualified majority** | For strategic decisions on which consensus cannot be reached. For other decisions the percentage is usually lower. | A minimum level of agreement, above 51% for the decision taken. | Mayoría cualificada |
| **Simple majority** | For tactical/organisation and operating decisions. | For decision to be taken rapidly. | Principio de mayoría simple |
| **Consent** | For tactical/organisation and operating decisions. | No objections to the decision to be taken. | Sociocracia |
| **Delegation** | For operating decisions. | Flexibility for daily operations. | |
| **Autocratic** | For organisational/ tactical and operational decision, or where there is regulation. | No objections to the decision to be taken. | |

## Consensus as a method for decision making

Aspires to the cooperative development of decision making, so that everyone can contribute, staring from a clear basis: the will to share power, the conscious and informed commitment to a process of consensus, where there is a common intention, a solid agenda and effective participation.

Adopting the consensus as the method for decisions implies everyone's belief in the truth. Its use supposes a high level of commitment to the decision on the part of stakeholders and usually prevents or resolves potential conflict in the management of marine protected areas, as the decisions taken have the consent and the support of all concerned..

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There are variations of the consensus method that limit the blocking of the approval of proposals by one or two people (consensus less one, consensus less two, consensus to revise in a certain period of time, etc.). If consensus is not possible, alternative mechanisms are available (such as qualified majority, whereby between 60% and 80% support is required to take the decision) maintaining a high degree of inclusion and transparency.

# C. Conflict management

## What for?

To transform conflicts and disagreement into:

- A source of learning and enrichment of outlooks.
- A rapprochement of diverging positions.
- A new advantageous situation for all people involved.
- To obtain agreements that constitute new social relations and rules.
- To overcome the limits of administrative procedures and prevent the trend of judicialising conflicts.

## How?

Political, judicial and competence-based approaches are beyond the scope of this guide which is focused on the management of conflict through employment negotiation and alternative intervention methodologies, such as social participation, facilitation and mediation. Under this approach, a legitimate third party removed from the conflict, with no authority to impose a solution, leads a voluntary process of consensus to reach agreements that the parties in conflict can support.

The guide recognises, although does not detail, other community-based forms of conflict resolution that do not need the intervention of a third party. These forms include those based on the management of the traditional commons (common goods) and new commons or global commons, such as the public domain and marine protected areas.

The participatory processes are important elements of the international proposals to resolve the social conflict around environmental problems.

The focus of this guide is inspired by the **Rio Declaration On Environment And Development**, whose Principle 10 states: "Environmental issues are best handled with the participation of all concerned citizens, at the relevant level."

While it is true that conflicts may escalate depending on how they are managed, there are some general steps to ensure an effective process. These are listed below:

- **Analyse the nature of the conflict.** Environmental conflicts may arise due to, among other reasons:
  - The access, use, management and recovery of spaces and marine resources.
  - The loss of biodiversity, of ecosystem services and good environmental condition of marine ecosystems.
  - The designation and declaration of protected spaces for the conservation of species, habitats and/or environmental functions.
- **Develop the capacity to see the conflict from the present**, looking to the future and with the intention of learning from the past without limiting the process.
- **Build a positive shared power**, recognising the attitudes and conduct that provide the capacity to participate efficiently, providing access to relevant and information and giving legitimacy to the diversity of knowledge.
- **Establish a common manner in which every party can see theconflict** and position from which to perceive it. Clarify the perceptions of each party, ensuring they recognise all points of view.

### Types of conflict

Exploring the needs, expectations, interests and doubts of the different stakeholders helps generate a more complete vision of the dimensions affected by the conflict (economic, cultural, scientific, ethical, etc.).

To try to better understand these needs, we can use Moore's classification of the five types of conflict:[4]:

- **Over information:** when there is disagreement on the sources, the analysis or interpretation of the information. It may be due to a lack of information.
- **Relationship conflicts:** mistrust, lack of credibility or doubts surrounding the integrity of the parties. They are usually due to negative emotions, false perceptions or stereotypes with little or no communication or repeated negative behaviour.
- **Relationship conflicts:** when one of the parties believes that to satisfy their needs, their opponent's needs must be sacrificed. So one of the parties aims to impose themselves over the other for their own benefit.
- **Structural conflicts:** where there are physical, institutional or formal limits preventing different stakeholders from resolving their demands. Normally caused by external forces from the people in conflict (e.g. Scarcity of physical resources or geographic conditions).
- **Value conflicts:** when there are different systems of beliefs and scales of values and some parties try to impose theirs on others.

4 Moore in "Los conflictos socio-ambientales: Aproximación a una gestión positiva.". See bibliography

- **Identify individual and shared needs**. Concentrate on desires, concerns and emotions rather than requirements or demands. Find out what needs must be covered to satisfy the parties or what elements must change for the conflict to cease to exist.
- **Generate a shared framework of reference and some basic agreements** for the development of the process.
- **Build a joint agenda.** Agree the themes to be discussed that will form part of the conflict to be managed.
- **Generate a diversity of options** around a singles solution, fostering creativity and collective knowledge, These options must be viable and satisfy the shared needs to help build trust between the parties.
- **Establish agreements and commitments on the themes discussed** that are acceptable to all parties or, ideally, with which all parties gain something, to ensure it is maintained over time.
- **Generate a final document with these agreement and commitments** and share it will all the people and organisations involved in the process, which also allows for subsequent monitoring.

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| Techniques | When to use them | Allows for... | To find out more... |
|---|---|---|---|
| **Non-violent communication** | In meetings or workshops in which a conflict is to be worked on to increase understanding, respect and cooperation in relations. | Promote cooperation to resolve unnecessary conflicts due to lack of communication and to learn to better handle conflicts. | Asociación para la Comunicación No Violenta de España<br><br>Guía de Comunicación No Violenta en grupos y asociaciones<br><br>Breve guía para la comunicación no violenta |
| **Open forum (deep democracy)** | Conflicts at a personal, relationship, group or global level, allowing for emotions, feelings and roles that emerge to be able to foster and guide dialogue geared towards conflict prevention and resolution. | Awareness of the diversity of points of view and positions on a certain issue must be taken into account, focusing on the one hand on more visible elements (gender, age, social position, economic sector, etc.) and on the other hand on less visible elements such as beliefs and world views of the people involved. | El foro abierto como herramienta de diálogo para la mediación comunitaria intercultural |
| **Generative dialogue** | In inclusive, creative and productive participatory processes, promoting the responsible commitment of the people and organisation involved. | Persons and organisations reimagine their lives, their circumstances, their relationships and believe and implement new options that allow them deal with dilemmas, problems, conflicts, challenges and crisis experiences creatively. | Diálogos generativos y su aplicación a organizaciones |
| **Forum theatre** | At times of conflict when we want to explore potential alternative actions. | The passive audience becomes a protagonist in the action, prepared for the intervention of real action proposing ideas, desires, strategies and solutions to suggest a series of alternative actions in a creative and artistic way. | Como hacer un teatro foro |

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| Techniques | When to use them | Allows for... | To find out more... |
|---|---|---|---|
| **Best Alternative to a negotiated Agreement (BATNA)** | When we want to predict what will happen if the negotiation doesn't come to a satisfactory conclusion. The best alternative to a negotiated agreement places on the table the existing alternatives for each party for which they do not need the will of the other party.<br>The negotiation, seeking the benefit of both parties, will be more comfortable for the party with the most satisfactory alternatives, compared to the party with worse alternatives or with no solutions if an agreement isn't reached. | Clearly identify for each party what they have and what they don't have before starting the negotiation, identify the pros and cons of the conflict, to seek the most satisfactory solution for both parties, at the cost of conceding or losing a little to win something, with the aim of ending the negotiation in a better position than before. | Mejor alternativa a un tratado negociado |

# D. Celebration and recognition

## What for?

- To foster group cohesion and generate relationships of trust over the long term and foster cooperation between the people and organisations involved in the management and presentation of a marine space.
- To develop awareness of belonging to the community and the marine protected area.
- To generate greater commitment to the process over the long term and in the face of difficulties.
- To make give visibility to, and evaluate, the diversity of experiences, skills and knowledge each person and organisation contributes to the community and to foster an inclusive space.

## How?

Generate spaces where people and organisation who participate in the process express the respect and appreciation for what everyone can contribute, inviting care of the ways of communicating and listening to different contributions and experiences from respect for the different communication styles. It's about looking at diversity as a source of value and social capital. It's also about encouraging moments of informal and relaxed conversation, with room for music and even games and fun.

It is recommended to include these spaces through the monographic sessions foe the celebration of a landmark or significant event for the group or the fostering of cohesion between the stakeholders or a marine protected area. Also through brief, transversal activities in each of the sessions (meetings, workshops, etc.).

| Techniques | When to use them | Allows for... | To find out more... |
|---|---|---|---|
| **Icebreaker** | At the start of the sessions. | There should be a minimum level of knowledge among the participants. | 700 dinámicas grupales<br><br>Manual de Técnicas y Dinámicas<br><br>100 Formas de Animar Grupos<br><br>Dinámicas Grupales para todas y todos |
| **Presentation and knowledge (networking)** | When people don't have a lot of prior knowledge or when they know a little, they have common interests. | To get to know aspects of the people to help generate closer relations and to develop a cordial relationship. | |
| **Activation, play and relaxation** | To initiate the session or during it, when there is tiredness or disconnection, where there has been demanding work or when we want to relax. | The group has a bit of fun and recovers high energy and productivity, creating confidence and accessing more creative, intuitive thinking... | |
| **Appreciative feedback** | When we want to increase cohesion. | Incentivise participation, provide cohesion and increase the culture of recognition and appreciation. | |
| **Evaluation** | At the end of the sessions or the process. | Obtain useful information to increase the efficiency of the process. | |
| **Celebrate results** | After achieving a significant landmark of the process. | Evaluate the work done, incentivise participation. | |
| **Commemoration of the anniversary of the creation of the area and local events with the area** | On the dates indicated for a marine protected areas (designation, declaration or others). | Develop networks in the territory. | |

**To be taken into account in the Communication Plan:**

The call for each of the step 2.5 sessions. Design and development of the participatory processes will be focused on objectives and expected results of the session and the process, as well as the context and framework it forms part of, remembering the prior and subsequent steps set out in design.

Once the session is completed, a report is submitted to those involved in the process, including a list of the people and organisations who have participated, the methodology and the techniques used, the result and the conclusions reached. What to do with these conclusions must be explained, remembering the following steps of the process

Before going any further, it's evaluation time...

## Phase 2 checklist:

**We already undertaken...**

- The roll-out of the Communication Plan, its evaluation and any changes
- Communication of the start of the process.
- A social map.
- The gathering of unwritten information using participative techniques on the ground.
- The analysis, finishing and validation of all the information collected through a participative session.
- The assessment and adjustment of the initial design.
- An evaluation and adjustment of the Monitoring and Assessment Plan.
- The focus and objectives of the sessions planned in accordance with the characteristics of the process and the purposes thereof (research, decisions, conflict, celebration).
- The roll-out of different session planned and the evaluation processes.

# Phase 3

# Evaluation and closure

3

# Step 3.1. Final evaluation of the process and results

It is important to conduct a final evaluation, where we can identify the principal impacts and results generated from the participatory processes, and the obstacles overcome.

## What for?

- To measure the quality of the process.
- To measure the main impacts and results of the participatory process.
- To identify and learn about the barriers and difficulties that have arisen in the process.

## How?

Through holding a meeting of the steering groups, if any, or with the participation of a broader group upon the completion of the participatory processes. This meeting will see the completion of the Phase 3 checklist. It is important that the results of the final evaluation are communicated and accessible for the different stakeholders involved in the MPA, which will be set out in the Communication Plan.

## Phase 3 checklist:

### Process:

**Coordination of the process:**

- An steering group has been formed with solid and shared leadership.
- The rules of the game have been respected (defined in step 1.1).
- There has been institutional coordination.
- There has been coordination with other existing processes in the territory.
- The resources have proven adequate and sufficient.
- The results of the continuous evaluation have been taken into account for the adjustment of the process and to adapt methodologically.
- The resources necessary for the development of the participatory processes have been adjusted in line with the forecasts and/or financial cost.

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**Participation::**

- A satisfactory number of people and organisations have been involved.
- Participation has been equitable from the gender perspective.
- Participation in the different actions and sessions has been diverse in accordance with the mapping of actors and the social reality.
- Participating people and entities are legitimate representatives.
- The degree of satisfaction of the people and organisations involved in the process is high

**Scope of participation:**

- Quality information is provided for the discussion and/or deliberation (sufficient, rigorous, clear, plural, useful, accessible and with language adapted to the profiles of the participants).
- There has been participation in the phase of gathering, analysing and/or validating the information relevant to the process.
- There was sufficient capacity on the part of the social stakeholders.
- The contributions respond to the objectives of the participatory process.
- The contributions have been considered with rigour and real incident on the decision making process.
- The participating people and organisation have received reasoned and transparent information on the way these results are included or not.
- The scope of participation expected has been achieved (information, communication, consultation, deliberation, decision, management).

**Results and impact:**

- The results provided for in the process.
- New ideas or solutions to problems have been provided.
- Decisions accepted by all stakeholders have been taken and implemented.
- Environmental conflicts have been managed/transformed.
- An event was held to promote sense of belonging among the population with MPA, cohesion between people and organisation participating in the process or the achievement of results and/or significant landmarks in the process was celebrated.
- The tangible results forecast for the process have been achieved.
- Relations between the people and organisations have improved.
- There has been some change in policy and/or legislation.

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- Some improvement in the culture of participation has been achieved (for example, the people and organisations involved have the will to come back and participate in future processes).
- Some improvement in integration and equality has been achieved.
- The results expected in relation to conservation of marine protected areas have been achieved.
- The process has served to fulfil the objectives of the LIFE INTEMARES project.
- The final notification of the end of the process has been issued.

**To be taken into account in the Communication Plan:**

### Communication of the end of the process

It is necessary to inform the participants in of the end of the process and the next steps, if any are schedule. It is important to share the results of the final evaluation of the entire process and, if possible, leave a channel of communication open for the future, with a list of contacts of the participating people and stakeholders.

# Documentation and references to explore the design of participatory processes in greater depth

## Share planning in the Natura 2000 network...

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## Tools for decision making...

- Guía de procesos de consenso. Instituto de Facilitación y Cambio (IIFAC). Beatrice Briggs
- Guía rápida para la toma de decisiones. La transicionera.
- Manual construcción de consensos. Los procesos colaborativos. Fundación Cambio Democrático. 2003.

## Basic aspect of mediation and conflict resolution...

- Libro blanco de la mediación en Cataluña. Generalitat de Cataluña. 2011.
- Los conflictos socio-ambientales: Aproximación a una gestión positiva. Asociación de Fundaciones para la Conservación de la Naturaleza y Fundación Biodiversidad - Ministerio de Agricultura y Pesca, Alimentación y Medio Ambiente. Cuaderno de campo nº10. Antonio Ruiz Salgado. 2017.
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