

Our Florida Reefs Lessons Learned Workshop Final Report

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Our Florida Reefs Lessons Learned Workshop October 26 & 27, 2016

Background

The **Our Florida Reefs Community Planning Process** was developed *“To bring local community members together to consider the problems facing Southeast Florida reefs, learn about the potential tools and approaches that can help reduce the problems, and recommend specific management actions that should be taken.”*

The core design and implementation team, made up of conservation professionals from key federal, state and county agencies and led by the Florida Department of Environmental Protection, worked together for over a year and a half to carefully design a community planning process that they felt would be most suited to the scale and culture of the planning area. The area covers four counties from Martin County to the North through Miami/Dade at the south of Peninsular Florida. This area has a resident population of 5.8 million people.

The planning process was held in tandem with the deliberations of the Florida Coastal Ocean Task Force. The members of which include elected officials from the four counties and many of the cities in the area as well as industry, government and non-government leaders.

The two-year process included the following four phases:

Step 1: Community Meetings designed to provide information to interested stakeholders and identify appropriate people to serve as representatives in the intensive working groups

Step 2: Community Working Groups were formed representing the range of interests. Over a six-month period, the Working Groups studied vast amounts of information about the system, previous plans, and spatial data. They used this exposure to information and their experiences to generate suggestions for recommended management actions.

Step 3: Sharing Recommendations. The Working Group’s recommended management actions were shared with the general public in numerous public meetings, on-line and other formats. These meetings generated public input and additional recommendations and considerations that resulted in modifications of the Recommended Management Actions.

Step 4: Finalize Reef Management Strategy. Final approval of the Management Strategy is awaiting the final summary report from the Florida DEP and _____

Our Florida Reef Lessons Learned Workshop Purpose.

The Our Florida Reef process was the result of considerable thought and effort. Much was accomplished across a very complex geographical, ecological and cultural land and seascape. The core design and implementation team, who were the architects, coordinators and facilitators of the process, gathered together October 26 and 27 to take stock of what was learned in the design and implementation of this process in order to benefit them and other professionals who may undertake similar community collaborative processes in other parts of the state, country and world (NOAA.)

The overarching purpose of the Our Florida Reefs (OFR) Lessons Learned Workshop was to gain clarity on what worked well and what one might want to change about the process in hindsight. This information and development process could be considered a model for stakeholder engagement and collaborative planning for any future community planning process. Since the OFR process involved considerable time and effort the participants also wanted to have an opportunity to have a structured way to reflect upon their individual experiences and how these benefitted their professional growth. Everyone at the workshop had an opportunity to share recognition of what was accomplished and how this effort could make a long-term difference in the conservation and management of the reef ecosystems of southeast Florida.

Meeting Design

The Two-Day meeting focused largely on distilling the most important aspects of the OFR project (the **Big Things to Keep** and the **Big things to Change**.) Eighteen people participated in the two-day meeting.

DAY ONE.

The first day the group used a structured process to dissect the “Things that Worked Well” or “Things to Keep” to gain a clearer perspective on why these worked well. The second day was focused largely on the “Things that Didn’t Work” or “Things to Change.” This evaluation focused on the more significant challenges to understand (in hindsight) what modifications in design or execution might have avoided these or reduced their impact on the process. There was also some time set aside for individual reflection.

For the purpose of organizing the group’s thinking and discussions and capture observations and ideas in a manageable way, the OFR process was broken down into six categories. These **Categories were:**

1. Process Planning and Facilitation
2. Outreach (Public meetings; PSAs; Print materials; Website; Coordination with decision makers; Leadership and key agencies)
3. Community Working Groups (Design; Recruitment; Representation; Placement; Retention; Engagement)
4. Education of Community Working Groups
5. Development and Review of RMA’s and Marine Planner
6. Overarching

Meeting Results

The big “**Things to Keep/What worked**” and “**Things to Change/What Didn’t Work**” that the different participants perceived about the process were written on green and yellow comment cards, respectively. Those comments are presented below:

Note: The Facilitator added in some additional “Things to Keep” and some additional “Things to Change.” These were derived from phone interviews held with participants prior to the meeting.

1. PROCESS PLANNING AND FACILITATION

Things to Keep/What Worked

- Employing professional facilitators
- Inclusive process planning team (PPT)
- No one's ideas were rejected – showing that each person's participation was valued
- Establishing a process planning team that had experience in engaging stakeholders
- Having 'advisory groups' to provide information and be available for people to reach out to for advice and recommendations
- An extensive planning process (planning to plan and then plan some more)
- Keeping the entire process documented for reference

2. OUTREACH

Things to Keep/What Worked

- OFR received a lot of attention both good and bad which enabled significant public reaction, discussion and engagement
- OFR raised knowledge and awareness of reef management issues to local political leaders
- OFR involved all interested parties through inclusive community meetings
- The website for OFR was user friendly, digestible for the general public, very informative and interactive allowing people to comment and voice their opinions and concerns through online forum

Things to Change/What Didn't Work

- The process was very long and it was hard to maintain focus
- The first facilitator who was hired did not have the right mix of skills and experience to design and lead such a complex process
- There was a perception that some of the OFR participants had a pre-determined focus on creating Marine Protected Areas and less emphasis on other alternatives as outcomes
- There was a perception that the facilitator gave preferential treatment to some "like minded" views
- There were numerous overlapping roles among the participant

Things to Change/What Didn't Work

- There was a lack of coordinated discussion with major ocean/reef group newsletters, magazines, blogs, etc.
- Local government entities needed to be updated at regular intervals
- There needed to be rigorous agency leadership briefings especially after any staff turnover
- There was reoccurring dissemination of inaccurate information
- Scientific information was dismissed or discredited due to affiliation
- There needed to be a better effort to tie scientific explanation to the RMAs in a way that the public could understand

3. COMMUNITY WORKING GROUPS (CWG) (*Design, Recruitment, Representation, Placement, Retention, And Engagement*)

Things to Keep/What Worked

- CWG's were diverse representing many different views
- CWG members were respectful to one another. They really listened and made an effort to understand the other viewpoints represented
- CWG members trusted the process
- CWG Members put forth tremendous effort throughout the long process

Things to Change/What Didn't Work

- Needed better engagement of stakeholder groups in CWGs (especially fishers)
- Needed better engagement of fishing lobbyist early in the process
- Needed a better method of participation for the fishing community

4. EDUCATION OF COMMUNITY WORKING GROUPS

Things to Keep/What Worked

- Providing baseline education for all community working groups prior to initiating the Recommended Management Actions (RMA) development process
- Community working groups learned about the politics and advocacy that surround the issues

Things to Change/What Didn't Work

- The public and the CWGs lacked understanding of the distinction between the management of 'coral reef fish assemblages' and 'state fisheries stocks'

5. DEVELOPMENT AND REVIEW OF RMA'S / MARINE-SPATIAL PLANNER

Things to Keep/What Worked

- Creating a sense of ownership of the RMA's among the working group members
- Marine Planner as a spatial planning tool
- Developed some strong agreement between very different "sides"
- Community working group members developed some feasible and effective RMA's by combining their knowledge of science, policy and law

Things to Change/What Didn't Work

- Too many Recommended Management Actions (RMAs) generated
- Needed to establish objectives to better focus and streamline the generation and review RMAs
- RMAs were all addressed individually. Need more effort to combine and synthesize RMAs as they are generated.
- There needs to be less information (Tier I and II) for each RMA generated in the beginning of the process (less focus on N-146 – MPA Zoning Framework)

6. OVERARCHING

Things to Keep/What Worked

- Great teamwork
- Inspired and committed staff that set the tone for success
- Cultivating a culture of respect among the members through communication and coordination
- Bringing stakeholders together to understand the many issues from the perspective of the community and reef managers

Things to Change/What Didn't Work

- Fish and Wildlife Commission support
- There needed to be more effective engagement with the fishing community (**ALL** types of fishers)
- Agency leadership didn't fully understand the process and therefore were not fully committed when late in the process there was some dissent by some groups
- The process might have benefitted from a political directive of some kind which clarified the need to protect the reef resources and the role of the grass roots group in developing recommendations
- A way to address inaccurate information
- A productive way to manage those members of the public who engaged in the public meeting process in a threatening or aggressive manner.
- Ways to effectively manage staff turnover throughout a long process

Once the “Big Things” to Keep or to Change were posted under each category, the group broke into four sub-groups. Each sub-group evaluated two of the first five categories (categories 3&4 were combined into one) as well as one of the ‘Overarching’ topics and discussed in depth the “Big Things that Worked.” Each sub-group was given a worksheet with the following questions to aid them in their discussion:

What Worked

- Why did this “go well”?
- What are the transferrable “lessons”/ the “must do’s if you want to repeat this success?”
- Is there something you might have tweaked or added here that could have enabled an even better result?
- Are there any other considerations or information you think are important to share on this? (budget needs, staffing skills needed, information, support, etc.)

Things that Really Worked	Why did this “go well?”	What are the transferrable “lessons”/the “must do’s if you want to repeat this success?”	What might you have tweaked or added that could have enabled an even better result?	Other Considerations or information you think important to share on this?
Overarching				
Culture of respect	<ul style="list-style-type: none"> • Facilitation • Criteria for CWG membership included ability to work collaboratively • Process Planning team and project teams established tone • Influence of the SEFCRI approach • Social bonding outside of process allowed people to respect others’ opinions 	Stick by the criteria outlined for CWG members. Non-collaborative CWG members can offset group	Facilitate more evenly across agreeing and dissenting views	
Inspired and committed staff setting the tone for the process	<ul style="list-style-type: none"> • Common commitment of staff to the mission of the project and to the value of creating a sense of “family” • Getting new staff up to speed • Weekly check-ins • Sub-project teams enabled a better division of labor 	<ul style="list-style-type: none"> • Targeted roles and assignments • Staff culture of everyone does everything (limited hierarchy) • Celebrate successes 	Not everyone needs to be involved in all meetings/calls	Have meeting to step everyone through roles, especially those who are not on planning calls
Developing and having a CHARTER	<ul style="list-style-type: none"> • Provided structure for continuity • “Contractual” agreement between everyone • Acted to “defend” the process (couldn’t be derailed later) • Changing the “rules” midstream would be seen as steamrolling citizens 	<p>NEED a charter. Do this right away</p> <p>Voting on the Charter’s every step was laborious but worth the effort as it made the whole process democratic and aided in maintaining the credibility of the process.</p> <p>Include the process for changing and releasing members in the charter</p>	Enforce the mechanism for releasing members.	<ul style="list-style-type: none"> • Laminate the process charter and refer to it throughout • Brief leadership on the process charter early on • Can use to ensure government agencies participation

Things that Really Worked	Why did this “go well?”	What are the transferrable lessons?	Suggested tweaks or additions?	Other Considerations
Capacity building of staff	<ul style="list-style-type: none"> • Great learning experience for staff • Staff learned about facilitation of small groups, talking to community members at public meetings, process design, etc. 		<ul style="list-style-type: none"> • Train new staff when you have turnover • Would be great if you could do training/capacity building before it's needed 	
Documentation of whole process	<ul style="list-style-type: none"> • Provided Transparency • Defensibility • Keeps people “honest” (can't change “tune”) • New people can catch up • Keeps institutional knowledge, continuity and historical context 	Takes time/staff to maintain all the records		Seems mundane and tedious but worth the effort

Process planning and facilitation (core team, ppt)

Things that Really Worked	Why did this “go well?”	Transferrable “lessons	Suggested Tweaks or additions?	Other Considerations?
Process Planning Team <ul style="list-style-type: none"> • Being able to reach out to an advisory group • Inclusive planning team 	Having people who had done stakeholder engagement planning before enabled us to recognize and plan for potential pitfalls	<ul style="list-style-type: none"> • Early recognition of expertise needed on PPT • Set meeting dates and times • Minimize duplicity among advisory group members (combined meetings) 	Manage expectations for time commitments	Emphasize time management to ensure efficiency
Having professional facilitators	<ul style="list-style-type: none"> • Effective and efficient coordination with key staff and advisory group • Complimentary personalities between staff and facilitators 	Ability to adaptively facilitate in real time	<p>Consistent facilitator(s) throughout process</p> <p>Facilitator(s) should be able to be flexible</p> <p>A process this size needs at least two lead facilitators</p>	Find the “right” facilitator(s) – incorporate some kind of practical demonstration in the interview/selection process for facilitator

Things that Really Worked	Why did this “go well?”	Transferrable “lessons	Suggested Tweaks or additions?	Other Considerations?
<p>“Planning to plan” and then planning some more</p>	<p>Smaller core group to think through and delegate decisions and information needs to appropriate advisory group members</p> <p>Maintaining a visual representation of the process in a work space for all to follow, reflect upon and modify</p>	<ul style="list-style-type: none"> • Collaborative working and decision making environment • Tasks were divided to ensure timely follow-up • Individual ownership for collective success 	<p>More capacity: time, staff (paid and dedicated interns), funding, expertise</p>	<p>Importance of staff continuity and institutional knowledge</p>
<p>No one’s ideas were rejected</p>	<p>As Relates to the CWG, all ideas were listened to, not rejected (did have to winnow later) but initial approach allowed people to feel heard and respected.</p>	<p>Need way for people to feel that they have been heard.....</p> 	<p>BUT: Would be good to look at different way to achieve this outcome as the way this was done locked us into a very LONG process</p>	
<p>Advisory Groups</p>	<ul style="list-style-type: none"> • Each advisory group served a different purpose and could be called upon when there was a need for clarification or education • Advisory groups aided in keeping the CWGs educated • Community members could go to the advisory groups for recommendations • CWGs working with advisory groups helped develop social capital among the OFR members <p><i>*Advisory Group Example: SEFCRI Technical Advisory Council Group (TAC)</i></p>			
<p>Outreach (public meetings, PSAs, print materials, website, coordination with decision makers, leadership and key agencies)</p>				
Things that Really Worked	Why did this “go well?”	Transferrable “lessons	Suggested Tweaks or additions?	Other Considerations?
<p>Public service announcements with local heroes</p>	<ul style="list-style-type: none"> • Doing these in English and Spanish and on TV and Radio 		<ul style="list-style-type: none"> • More money should be allocated for outreach • Having a full 	

			communication plan worked out at the beginning with a budget, etc. would be really helpful	
Gained a lot of attention for OFR (good and bad)	More public awareness of resources	<ul style="list-style-type: none"> • When people think that they are going to lose something they will show up/speak up • Community meetings were an opportunity for clarity 	<ul style="list-style-type: none"> • Proactively engage groups • Utilize CWG members to address misinformation 	Make sure all the accurate/correct information is easily accessible
Raised awareness of local political leaders			<ul style="list-style-type: none"> • Need more engagement with local leaders on important concepts • The process needs to be brought to political leaders with greater frequency to stress the importance and generate awareness (i.e. Commissioners' meetings) 	
Website (Effective repository of all products and information)	<ul style="list-style-type: none"> • The website was a repository of all products and information • It was user friendly, engaging and aesthetically pleasing (photos that capture the mission) • It was well planned and provided transparency of information for all users • Comment forums allowed people to comment and those comments were addressed during the meetings making those members feel heard 	<ul style="list-style-type: none"> • Use a professional to develop your website • Plan the functionality that will be needed in advance 	<ul style="list-style-type: none"> • Allow for a more categorized/organized way for commenting on RMAs • Provide a way to 'search' RMAs on the website 	

Things that Really Worked	Why did this “go well?”	Transferrable “lessons	Suggested Tweaks or additions?	Other Considerations?
Community meetings (Kickoff meeting)	<ul style="list-style-type: none"> Established well defined objectives Meetings were well designed and publicized Participants completed ‘Presentation Boot camp’ to prepare them for the process; The process did not allow grandstanding Meetings had well thought through objectives and were well designed and publicized Participants were strategically recruited 	<p>The kiosk design allowed for a good ratio of participants to staff</p> <p>It is ok to focus on the coastal community and not the general public</p>	<p>Choose your meeting locations to be areas that are neutral or “non-threatening” to targeted participants.</p> <p>Choose times that will allow working people the greatest chance to participate (late afternoon/early evening)</p>	
Community Meetings (RMA Rollout Meeting)	<ul style="list-style-type: none"> Good (appropriate) venues Effective engagement of community members Each working group host had a personalized message 			
Community Working Groups - (Design, Recruitment, Representation, Placement, Retention, Engagement, and Education)				
Diverse Make-up of CWG’s	<ul style="list-style-type: none"> Brings in different perspectives Shared practical knowledge on threats and solutions Established a high level of integrity into the process Fostered collaboration among the groups 	<ul style="list-style-type: none"> Identify groups up front Strike a good balance representation for each group; Don’t design a group that will all immediately agree; Put CWG members through an application process to establish a sense of responsibility and allow good vetting by vice chairs. 	<ul style="list-style-type: none"> Should have created other mechanisms to allow fishing groups to participate and give input Don’t assume that your CWG members represent all the diversity within the stakeholder membership group 	

<p>CWGs listening, respecting, and trying to understand one another</p>	<ul style="list-style-type: none"> • Good facilitation • All CWG members were given time to update the group on their current events. • Provided encouragement for representatives to keep their groups informed and to bring back their groups' issues to the CWG. 		<p>Establish a way to confirm that members are communicating to stakeholders and vice versa</p>	
<p>Most CWG members trusted the process</p>	<ul style="list-style-type: none"> • Facilitation improved • Process was clearly laid out, transparent • CWG had control, staff was there to act as neutral facilitators • Staff earned their trust by being responsive and neutral • All concerns were addressed • Minutes were taken and voted on by CWG • RMA's "belonged" to the CWG's 		<p>Agencies leaderships' involvement in the end eroded trust – not in the process because it was able to continue</p>	
<p>Baseline Education of all CWG members</p>	<ul style="list-style-type: none"> • 6 month educational period • Comprehensive, broad range of topics • Leveled the playing field for both science and management concepts • Information was presented through a variety of formats • Information really accessible throughout the entire process • Brought in top people in respective fields 	<p>Utilized outlines as guidance for all presenters</p>	<p>Review all presentations before they are given</p> <p>Include examples of other non-place based management approaches outside of Florida</p>	
<p>Effort of CWG members was tremendous</p>	<ul style="list-style-type: none"> • Because it was clear that it was their work • The Vice-chairs that were selected were very committed and had experience working collaboratively 	<p>The application for Vice Chairs stressed the importance of being able to commit</p>	<p>Need to condense timeline because people need to still feel current at the end of the process.</p> <p>People were worn</p>	<ul style="list-style-type: none"> • Providing "swag" builds unity • Provide snacks • Small group

	<ul style="list-style-type: none"> The CWG's perceived that what they were doing "mattered" 		<p>out by the end of the process or they didn't stay involved for the duration.</p> <p>Maybe have an intermediate "remote" event</p>	<p>lunch would be a nice thing to do</p>
Teamwork of CWG's	<ul style="list-style-type: none"> Ground rules Passionate participants Diverse expertise Intermingled seats 	<ul style="list-style-type: none"> Be both consistent and adaptable Group commitment to and development of mission and vision Celebrations along the way 		

RMA DEVELOPMENT AND REVIEW / MARINE PLANNER

Things that Really Worked	Why did this "go well?"	Transferrable "lessons"	Suggested Tweaks or additions?	Other Considerations?
RMA Development	<ul style="list-style-type: none"> RMAs that were easy to address were reviewed first to build agreement among the members so that tackling the more controversial RMAs thereafter would become a smoother process Members were first educated on the subject of a proposed RMA before a discussion was initiated 	<ul style="list-style-type: none"> Try to anticipate and avoid 'On-Boarding' of agencies after the process is well underway On-Boarding by agencies at the end of the process hinders their understanding of how decisions were made and the reasoning behind them RMAs may be archived but the decision for the current process must remain final 	<ul style="list-style-type: none"> Establish a concrete decision when RMAs are voted on 	

Things that Really Worked	Why did this “go well?”	Transferrable “lessons	Suggested Tweaks or additions?	Other Considerations?
Spatial Planning Tool	<ul style="list-style-type: none"> • The tool brought ‘science’ to the decision making process • Enabled all CWG members to utilize and work together; It was driven by CWGs and their input • Creating a visual map facilitated people’s ability to share and weigh in • The information was transparent and could be analyzed on the fly • Creating a visual map also helps in showing where there are gaps in the data • Minimal operation cost 	<ul style="list-style-type: none"> • Use open source software • Be wary of the nomenclature used • Establish or bring on staff that know the tool and the data and can help manage the software 	<ul style="list-style-type: none"> • Add data logger • Consider peoples comfort with technology and integrate the tool slowly into the process while continually educating everyone on how to use it • The more the tool is used, the more helpful it will be within the process 	
Working Group Members’ ownership of RMA’s	<ul style="list-style-type: none"> • Ensured stakeholder concerns were addressed within the process • Allowed agencies to maintain objectivity • Protected agencies from politics • Charter!!! 	<ul style="list-style-type: none"> • Charter that is developed and agreed to by the CWG members • Final decisions on everything is from the CWGs 		
Developed Strong Agreement between very different sides	In the context of all the other RMA’s, CWGs could see the big picture. This gave them a much bigger understanding and an opportunity for give and take	Focus first on the “low hanging fruits” These agreements build good will so that that the more controversial RMAs are easier to address.	Ensure all the diverse sides are at the table	
CWG members developed some feasible, effective RMAs by combining their knowledge of science, policy and the resources	<ul style="list-style-type: none"> • Good educational foundation • Diversity of knowledge and experience at the table • Process design (worksheet guidelines) 		<ul style="list-style-type: none"> • Clear communication from the beginning that a certain amount of information is necessary for an RMA to move forward. 	Ensure access to technical advisors

			<ul style="list-style-type: none"> • Reevaluate the necessity of including all data fields (some may not be possible to answer at that time) • Prioritize objective data fields especially as they link to prioritization criteria. 	
Things that Really Worked	Why did this “go well?”	Transferrable “lessons	Suggested Tweaks or additions?	Other Considerations?
CWG Members take ownership of the RMA’s	<p>Ensured stakeholder concerns were addressed within the process</p> <p>Allowed agencies to maintain objectivity and protected agencies from politics</p>	<p>RMAs that were not agreed upon were ‘archived’ and not thrown out so that community member felt that their recommendations were still relevant and maintained that ownership despite being off the table</p>	<p>Archiving RMAs did allow community members to maintain a sense of ownership but also clogged the process due to the overwhelming amount of RMAs;</p> <p>Try to encourage the combining or synthesizing of similar RMAs early on in the process to reduce the amount but maintain the ownership among the members</p>	

The Group also briefly discussed whether this type of community process might be more effective if there is some kind of legislative mandate under which the group would operate. Some of the thoughts expressed were:

- *OFR was a grass-roots effort that the community could take ownership over. This type of grass-roots “ownership” was a part of the initial draw of OFR.*
- *However, without any legislative weight behind OFR the group lacked urgency or importance among legislative officials.*
- *Additionally, without legislative mandate, the fishing community that was opposed to OFR could choose to not be involved making OFR look like it was not addressing the fishing communities needs or concerns.*

At the end of the first day the OFR Lessons Learned workshop, the group had a short discussion about how Lessons Learned from the OFR experience might be effectively documented for future use by others seeking to engage in a similar processes.

1. **Sharing the OFR Experience: A Case Study**

- Who is the Audience: Global conservation community, Others embarking on community Processes, Reef Resilience Network
- How: Publication in a peer reviewed journal, NOAA Technical Report
- Depth of the document: Succinct, Fact based; “Best Practices” Case study narrative.

2. **10 Best Practices for Community-based Collaborative Planning/The OFR Experience**

- Who is the audience: Global conservation community, Others embarking on community Processes, Reef Resilience Network
- How: White Paper/Nicely formatted and designed for easy distribution – both paper and electronic
- Depth: Brief, easy to read with links to web-based content and background.

3. **Professional papers on different tools or phases of the projects.**

Different members of the OFR design and implementation team might determine that some of the different tools and approaches used in discreet phases of the project might be of interest to other professionals. For example: the spatial planning tool or the design and recruitment of Community Members of the development of a process Charter. The group agreed that should someone decide to write up something like this, they would inform other members of the core team, to ensure that the proper authors and contributors are involved and/or consulted as needed.

DAY 2

The majority of this day was focused on the **Big Things to Change** lessons learned in the OFR process.

In order to focus deliberations on the most important things, the group undertook a rating exercise, “voting” on each of the 28 issues that were identified as things that “didn’t work” as well or as intended.

Participants were given different colored dots and asked to reflect upon the things that didn’t work and mark them with the colored dot that most fit their perception of the situation. The categories that people were asked to consider were as follows:

- **Really difficult (red dots)** – almost derailed process, took tons of resources (time, people, etc.) to deal with, consequences and problems still lingering and still need some level of attention
- **Bad (orange dots)** – took a lot of time and people resources, still requires some attention. Could have been a lot worse had we not taken remedial action
- **Moderately difficult (yellow dots)** – required a lot of time and effort but was resolved.
- **Annoying (green dots)** was an annoyance but was dealt with readily by a few people and a reasonable amount of effort

Everyone gave each “Thing to Change” a single sticker according to his/her view of the impacts of that challenge. Then, everyone broke out into three groups where each was given a “**Biggest Challenges/Things to Change**” worksheet.

Each group was told to choose three highly ranked challenges (lots of red and orange stickers.) For each challenge, the group had to decide if the issue was either 1) **Potentially avoidable** or 2) **Likely beyond our control**. Once they had agreed on this they were asked to discuss the issue (using a set of questions to organize the discussion) and make suggestions for what/how one might change or prepare for a similar issue should it come up in a future project.

The Things to Change that the group discussed were:

Science Dismissed and/or Discredited Due to Affiliation

The group decided that this issue was partially **avoidable** and partially **out of our control**.

- Discussion: It was difficult to get everyone to be physically present at the meetings so that they could listen and learn. The people that don’t show up to learn are not likely to alter their opinion or consider the opinion of others.
- Recommendations: Allow for ‘non-scientists’ to be the messengers. Possibly elect members of the CWGs to present information so that it is not dismissed or discredited due to agency affiliation. Provide more tools and support to the CWG members to do outreach among their stakeholders (possibly allowing stakeholders to act as messengers). Translate scientific information in a ‘story-board’ fashion applying more thought and explanation to the “How” and “Why” of the studies. Maybe there was almost too much emphasis on science. Would be useful to translate the information more into “what’s in it for you.”

Dissemination of Misinformation

The group decided that this issue was **beyond our control**.

- Discussion: We cannot control what messages others are circulating and we cannot control how others will react to that misinformation or if they will repeat it.
- Recommendations: Try to predict questions or areas that can be easily misinterpreted. Then, provide a ‘fact sheet’ that can be distributed. Keep the information short, simple, positive, actionable and focused on “what’s in it for you.”

Provide ‘Communication Training’ to staff. Show empathy with those community members that are concerned and may not understand the issues. Let concerned members know that you understand why they are upset or confused by reiterating what they are saying back to them. This lets them know you were listening to them. Then explain the issue while being sure not to repeat the misinformation. Repeating misinformation does not eliminate the problem. Take time to have personal one-on-one interactions with community members to explain the difficult issues and misinformation. This will allow you to absorb the content of what someone is saying and not be derailed by their explosive or feverish behavior while in front of the group.

- *A recommended article to read: Cultural Cognition Project, Dan Kahann of Yale University*

The Perception That There Was a Pre-Determined Goal to Implement MPA/No-Take Zones Strategy

The group decided that the issue was **avoidable**.

- Discussion: Throughout the two-year planning process of OFR, staff brought in representatives from Californian and the Great Barrier Reef to give presentations on their marine zoning process. These areas both had the intent for MPAs at the outset, which was not true for Florida.

This caused some groups (mainly fishers) to show up to OFR meetings only to defend themselves against pre-conceived notions. This was counterproductive to the cause.

- Recommendations: The focus needs to be directed towards ecosystem management as opposed to MPAs and no-take zones. The planning process needs a more balanced case study review of other management area types. Alternative actions needed to be presented and treated as equal options. There needs to be a better explanation of the motivation, not just ‘vision’ but list of common goals. These common goals need to be decided on by the CWGs and presented by the stakeholders. Once common goals are established, they need to be frequently revisited to maintain focus and the science behind those original goals should be reviewed frequently as well.

Engaging Fishermen and Fish Lobbyists

The group decided that the issue was largely **beyond our control**.

- Discussion: The staff agreed that they were limited by capacity and strategy. In order to engage the more ‘challenging’ stakeholders, there needs to be a more one-on-one or direct approach outside of the meetings. And since there are so many different types of fishing groups, it is difficult to appeal to them all and connect with them in a way that is non-threatening. Some members of the fishing community wanted to use Florida as a “battle ground” to take a stand against regulations.
- Recommendations: Plan for better engagement of fishing community outside of the CWGs. Build in funds for these needs and ongoing outreach. Any recommendations made by the fishing community needs to be brought back to the CWGs. Dedicate one person among the staff to focus on each fishing group to cultivate a relationship and provide consistent input to the working groups. Identify people among the working groups that could help neutralize the ‘lightening rods’. Try addressing the older generation of fishermen first that have seen the change in the reef environment over time. They may better appreciate the urgency and importance of management actions. The older generation has clout among the fishing community and would be influential to other younger generations. If there is an example of a person or group of people that were once strongly opposed to management that now supports it, document their story with video testimonials and interviews. Be sure to reach out to and engage lobbyists from different areas of expertise – maintain a balance. Meet with out-of-region lobbyists (i.e. Tallahassee).

Process Was Too Long

The group decided that the issue was **avoidable**.

- Discussion: The time commitment made it difficult to maintain participation among the working groups. Trying to maintain participation was an additional labor imposed on the staff.
- Recommendations: Try to condense meetings by conducting them twice a month to maintain momentum. Try to condense/combine/synthesize RMAs throughout the process. Keep the list of RMAs smaller without losing information (cut duplicate RMAs early and often). Evaluate if spatial plans should be undertaken during or after the process (as a separate process). Provide some way to consolidate the focus of RMAs (for example: establish strategic objectives). Consider incorporating team and tech review processes directly into the OFR CWG meetings. CWG’s were not equipped to provide much information on Tier I and II and should be reconsidered as an appropriate part of the early RMA process. Consider combining north and south groups at the RMA stage.

Lack of FWCC support and understanding

- **Discussion:** The FWCC seems to weigh the opinions of consumption users more than the non-consumptive wildlife enthusiasts. The fishing industry is very, very strong in Florida as there is a lot of commerce related to fishing going on in Florida. FWCC was represented in the process but they seemed to have not been keeping agency leadership and decision makers well informed throughout. The political nature of the Commission makes them particularly vulnerable to “bad press.”
- **Recommendations:** Make sure that all survey data is unassailable. Use and clearly delineated all information sourced from FWCC studies. Have special sessions all along the way with Fishers from the diverse niches within this larger group of stakeholders. FWCC is often much more focused on fish stock than on habitat and ecosystem health. Need to be sure that information is available and accessible that makes the connection between long-term health and viability of fish stocks to the health of the habitat and ecosystem functions. Local fishing interests will be the biggest losers over the long term if the ecosystem collapses. Find and educate internal advocates.

The one management action that bred the greatest conflict was the potential designation of MPA's. With this in mind, put the actions for which there is agreement in play right away. Celebrate any successes there and build good will. Monitor and measure progress. The need for more action may well become readily apparent. There is more agreement on the need to protect spawning aggregates – consider ways to build from this agreement.

Other highly ranked challenges that were not discussed:

1. Clearer CWG and public understanding of distinction that coral reef fish assemblage management is not state fisheries stock management
2. Be able to tie science to RMA's in a way that the public could understand
3. More engaged and supportive agency leadership

Looking Into The Future

James Byrne introduced a proposed legislative mandate that is being developed to declare southeast Florida coral reef habitats as a special management area. This will allow the process of managing the reef to work under a legislative mandate. James has been collaborating with the fishing forum groups to develop the document so that all parties would support it. It was written into the document that “The Fish and Wildlife Conservation Commission’ shall lead the development of a section of the plan addressing fisheries management”. The document is currently out for comment to the forum of fishermen. Once the forum comments are address the document will be drafted and will be opened to the public for comment. This is big news for the SEFL area.

Other Highlights and Accomplishments

- Southeast Florida Reef Track designated as a Hope Spot
- Several project members have already taken on the implementation of RMAs themselves
- Some working group members became members of the SEFCRI team
- Coastal Ocean forum supporting water quality initiatives and monitoring
- Reef managers and stakeholders gained a better relationship with leaders and lobbyists in Tallahassee
- Reef managers and scientists gained a relationship with some important fishing groups

- Internally, relationships grew and efficiency increased to allow problem solving to be handled quickly and with less anxiety
- There is a new cooperative agreement on the pipeline
- RCSO – Citizen support organization
- Anchoring events
- **Milestones for the CWGs: CWG members went on to become a part of the SEFCRI team; the nomination of Southeast Florida and Molasses Reef as “Hope Spots” under the Mission-Blue initiative.*
- Overall, OFR received a lot of recognition and generated awareness among the community and local officials as well as regionally.

At the end of the second day, each individual participant shared a very high level summary of what they felt were the two most important “**Must-Do’s**” or “**Must-Don’ts**” they would tell to anyone who was interested in embarking on a similar project.

Must-Do’s

- Build a good strong process planning team and tell them they are in it for the long haul
- Be one with your team because you are all in it together
- Try to make every conversation productive
- Put in the leg-work to get the best and most appropriate facilitator(s)
- Support each other professionally and personally
- Keep calm and keep swimming
- Keep your friends close and your enemies closer
- Keep your poker face on to maintain a neutral standing among the groups
- Try to ensure sufficient staff capacity
- Research, prepare, plan, train and develop capacity so that you may better communicate with diverse stakeholders
- Keep perspective and realistic goals on how much can be accomplished reasonably over time (Quality vs. Quantity)
- Prepare for strong opposing forces and know that you will not change the opinion of or convince everyone involved
- Have Fun!

Must-Don’ts

- Don’t underestimate your opponent’s motivation for achieving ‘their’ goals
- Don’t be afraid to ask for help
- Don’t lose sight of the big picture
- Don’t lose hope over mistakes, mistakes will happen and are ok
- Don’t take things personally, stay on course
- Don’t give up, there will be challenges, mistakes and roadblocks. Good things don’t come easily

At the end of the meeting everyone was applauded for their great work, dedication, and support. It was a unanimous agreement that OFR was a success in many different ways and has great potential as a learning experience for others embarking on a similar journey.



Our Florida Reef Lessons Learned Meeting Participants

Jora's Observations and "Take Home" Messages:

- **The Charter was genius** and having the participants fashion it and vote on it's every facet was essential. All the agency participants and their leadership need to sign on to the Charter in a very "ceremonial" fashion.
- **The Community Working Group model is very powerful.** Just about everything you did with the CWG's was useful. They are the heart and soul of the process and the education that they received and camaraderie that was built was an essential part of the successes and the future progress.
- **Having a core team of dedicated, informed and empowered people with a cadre of seasoned advisors is a best practice.** Keeping the process schema mapped out on a wall for the core team to look at and reflect upon helped to keep everyone on the same page. It gave people a way to weigh in on things they might suggest be done differently and a way to see what they needed to prepare for.
- **The process really needs to have a clear and strong linkage between the known science and the Recommended Management Actions (RMA's.)** This could have been accomplished by applying something like the viability analysis that is outlined in Conservation Action Planning (CAP) or Open Standards for the Practice of Conservation (OS). Involving FWCC scientist in the viability assessment would have been a very valuable way to be prepared for the inevitable challenge to the science from the user communities. It would have ensured a chain of custody between the facts and the organization. And it would have made clear the connection between ecosystem health and fish stocks.
- **The number of recommended management actions was too burdensome** – it weighed the process down and slowed it down a great deal. Taking another page out of the CAP or OS system, the process of coalescing around RMA's would have been greatly served and likely streamlined by linking the actions to your viability analysis by setting viability objectives.
- **Mapping possible areas for designation or special actions may have been a step too far in a purely volunteer advisory type of process.** The Our Florida Reef project may have been just as valuable if it would have stopped at the point where the idea/need/suggestion of exploring the concept and the range of possible designations that could be used as management and conservation tools. Taking it the step of highlighting actual areas and suggesting designations probably needed to happen under a legislative mandate.
- **The world we live in is a world of unfettered and uncontrollable information.** We cannot change that so we must be prepared to deal with it. It is impossible to do anything without there being countless streams of information flowing – some of it useful and real, some of it inflated or imagined, some simply misunderstandings, and some that will be purposefully misleading.

Public agencies need to be prepared that anytime they are undertaking anything that is really important, new or different - this is likely to trigger an explosion of information from any number of sources that cannot be controlled. Agency leadership needs to be realistic about this and not overreact. Agency and project communication officers need to have materials prepared to make sure the accurate information is available at each juncture of the process and there needs to be a "fact check" service set up in advance to quickly, evenly and without bias, refute misinformation or purposely inflaming and misleading rhetoric. By not addressing misinformation, especially purposefully inflaming rhetoric, the perpetrating parties are emboldened and will be even more apt to launch these types of damaging campaigns in the future. Having no strategy to address the plethora of information that will come from other sources is a risky strategy not just for the project in question but for the agency long term.

Overall **Key Points** that Jennifer Stein felt were the most important from the workshop.

- Educate prior to the process
- Anticipate problems and questions and prepare information continually during the process
- Let the community be the leaders and give them ownership over the process while providing facilitation and education
- The process must be adaptable and alternatives must be generated
- Cultivate a social network among the community members
- Create a Charter early in the process and continually refer back to it – promote democracy
- Create a story board of the decision making process so that it can be referenced later in the process (Documentation)
- Continually refer back to the original goals and objectives to maintain focus and efficiency
- Decide if the process is appropriate for legislative involvement
- Lastly, anticipate the opposition (ex. Fishers) and plan for additional capacity (time, money, staff, outreach and education, press, etc.)