

Using the PA-BAT in management planning

Introduction

The PA-BAT aims to inform protected area managers about the range of values and associated benefits in protected areas, and introduce a participatory process for engaging a range of stakeholders in identifying and communicating issues of local, regional and national importance to protected area managers.

Using the PA-BAT Results

Protected area managers in Croatia are well acquainted with the area, but they do not communicate enough with the local community, and due to that PA-BAT could be a good tool for them. Learning from local stakeholders who have life-long (and sometimes multi-generational) experience of an area is clearly best practice management. However it is not always easy to find ways (and time) to engage with different stakeholders, to collect a wide range of information and ensure that one opinion does not dominate. The PA-BAT provides managers with a tool to understand, assess and engage in a wide ranging dialogue in just a few hours. Although some managers may be familiar with many of values presented in the PA-BAT the generic list of all possible values and benefits ensures that all issues relating to an area are explored.

The PA-BAT assesses the relative importance of the range of values and benefits: locally, regionally and nationally. When using these results to develop, revise or assess the functionality of a management plan, the assessment of local values and benefits is likely to be particularly relevant (i.e. benefits to those people living in or near the protected area).

When taking part in a PA-BAT workshop and reviewing the results, managers and staff should consider the linkages between the PA-BAT and the management plan, including:

- *Do the management objectives of the protected area reflect the results of the PA-BAT assessment?* Clearly stakeholders' views are not as likely to be as informed of the biological and ecological importance of an area as managers/staff but if there are major divergences between the PA-BAT results and the management plan (e.g. stakeholders see tourism as very important economically but management wishes to limit tourism; or managers are unaware of the economic importance of specific resource use in the area) then managers should consider either 1) developing further dialogue with stakeholders if conservation objectives are not aligned to stakeholder priorities, or 2) if revisions or new areas of management are required in the planning document.
- *Is the assessment of resource use in the protected area sustainable and does it contribute to effective conservation?* The PA-BAT only assesses legal resource use in protected areas. but all the PA values from the PA-BAT should be asked to the stakeholders and evaluated (or written in the notes). Although some activities related to PA resource are forbidden, such as hunting, stakeholders could still have benefits. As an example, due to good conservation effort of Paklenica National Park number of large herbivores is increasing and causing the effect of an overflow of wild animals in the surrounding hunting grounds. This is why three hunting associations valued Paklenica for hunting although hunting is forbidden. The level of importance of resources (both economically and for subsistence) may raise issues of sustainability. In this case it is important that managers and stakeholders with the rights to use resources continue dialogue after the PA-BAT assessment to develop resource use plans (e.g., memorandums of understanding on the level of resource use) to ensure long-term sustainability and effective conservation of resources. In some cases stakeholders (and their families before them) will have had a very long-term association with resource use in the area and may be able to provide information that can be used in monitoring resources (base-line data in monitoring usually only goes back at best to the declaration of a protected area – and stakeholders with a long-term association with an area may have a much longer view of resource use and information on sustainable practices, or sometime past practice, which may inform current management.

- *Are there important cultural, historical, or spiritual sites in the protected area?* Examples of the rich cultural heritage of Europe often occurs in protected areas and interpretation and management is frequently well defined. However it is clearly important that managers acknowledge and manage sensitively any areas of particular historical, spiritual or cultural importance highlighted in the PA-BAT assessment and involve other concerned stakeholders in discussions about their management. Cultural and historical values were often neglected in PA management due to the main goal of protected area which is conservation of nature and its processes. Economic potential for cultural and historical values is recognised in the majority of PAs. These values often include different kinds of cultural heritage, which are sometimes even more prominent than natural values. Therefore, high appreciation of cultural values by stakeholders, in particular, local people, should be reflected in PA management.
- *Have some values been identified by stakeholders as having potential to provide benefits (or increase benefits) in the future?:* the assessment and in particular the discussions related to this assessment may inform managers of possible new activities on a range of issue including for instance new or more effective economic activities; educational activities; or more effective mitigation of threats such as floods or avalanches. When discussions in the PA-BAT workshops focus on potentials it is important to explore how these can be realised, or at least who can help develop ideas about potential into actual projects or plans, otherwise these can become a long 'wish list' of activities building expectations amongst local people with little likelihood of implementation.

The PA-BAT workshops are as much about collecting stories, making alliances and discussing issues/problems as they are about making an assessment. Indeed as with all such methodologies the *process* of the assessment (meeting people, chatting over coffee etc.) can be just as important as the *results*. An addition from the WWF team to the PA-BAT assessment was the survey which was developed in order to measure what have participants learned, have they met a new acquaintance and will they apply new knowledge and start a new collaboration with the newly met stakeholders. Effective facilitation and recording/follow up of issues raised during the PA-BAT workshops should help to reveal a wealth of information which can be used in protected area management planning and in particular in communication.

Using the PA-BAT results and workshop write up to identify new/revised management objectives and actions is not a formulaic process. It requires careful consideration of the workshop results in relation to the planned or existing management plan and vision and creativity in using the results to inform and improve the effectiveness of management planning.

There is a difference in the recognition and valuation of subsistence benefits and non-economic benefits. Subsistence is connected with existential values (obtaining the necessities for life) such as (food, water, air) while non-economic are related more to well-being (culture, recreation, education). This is the way some PA values in the analyses are described as subsistence values and some non-economic values.

In the PA-BAT methodology, there is not a specific question related to caves although the majority of the PAs are karstic in the Dinaric Arc region (Western Balkans). The recommendation is to add PA value – caves, in the methodology.

Learning from the PA-BAT Process

Literature on and tools to enable participatory assessment of issues related to protected management have long been promoted as best practice. However in many cases the involvement of stakeholders in management has often focused more on telling people what managers are doing, or intending to do, rather than asking stakeholders their opinions on or relationship with the area protected and their views on the management arrangements. This has also been the case with Paklenica National Park. However, the current practice of management planning in Croatia is significantly better than 10 years ago, when Paklenica National Park was developing its first management plan. It can be expected that the new management plan will be developed using a participatory approach that engages stakeholders, rather than just informing them of activities.

The PA-BAT has been designed to be used in a truly participatory manner engaging stakeholders in dialogue and then agreeing what is important about the protected area through a transparent and democratic process, through the use of a assessment form projected onto a screen. The subjects (the assessment of a range of values and benefits) and the process (using graphics to assess the relative importance of values) require little introduction and allow time for maximum stakeholder engagement.

The type of process developed for the implementation of the PA-BAT could also be used directly in the development , or on-going assessment, of management plans. Whereas the PA-BAT focuses on assessing values and benefits, similar process could be used to assess:

- *Management priorities:* asking for stakeholder opinions on priorities for both management objectives and management actions
- *Decision-making:* protected area managers are often faced with difficult management decisions in terms of different stakeholders' desires and conservation effectiveness. In these cases issues could be presented and fully explored in a well facilitated workshop which also uses the PA-BAT simplified assessment approach to input into decision-making processes
- *Management effectiveness:* simple management effectiveness tools such as the Management Effectiveness Tracking Tool (METT) could easily be adapted for use in a stakeholder workshop using a similar method (i.e. using simple projected graphics). When repeated, PA-BAT can also be used as a management effectiveness tool, since it gives precise answers to the question of direct and indirect benefit the stakeholders have from the PA management objectives and actions.

Checklist and action plan for using the PA-BAT and management planning

The assessment form below draws on the discussion above and can help manager and staff in discussions related to using the PA-BAT results.

| Issue for discussion | Developing action plans |
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| Do the management objectives of the protected area reflect the results of the PA-BAT assessment? | <ol style="list-style-type: none"> 1. Review the database of PA-BAT results and draw up a list of issues or a graph (visually more attractive and self-explanatory) seen as very important (score 2) and important (score 1). It is important to read the notes from the workshop to also link illegal activities and problems which are not visible from the list or graph of PA values. 2. Link specific management actions in the plan which relate to the values and benefits seen as important and identify gaps where important issues (score 1-2) are not linked to management actions. Note: PA values can be linked to more than one management objective and related action. Therefore, it is a good idea to make groups of connected values. In the example of Paklenica, those values were nature protection (through the maintaining the pastures and its biodiversity), livestock grazing (traditional sheep breeding), cultural heritage (by preserving the recognisable architecture and traditional values) and tourism (improving local offer). 3. Similarly assess if primary management objectives and activities do not align with the PA-BAT scores (e.g., conserving traditional agriculture is a major objective in the management plan to conserve upland pastures, but was not considered important by stakeholders). PA management does not need to wait for the revision of management plan but through annual plans, they can develop activities in order to use recognised potentials or solve recognised gaps in perception of PA values between them and |

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| | <p>locals (in alliance with the PA purpose).</p> <ol style="list-style-type: none"> Discuss if any changes are needed in the management plan or implementation of the plan as a result of this process Discuss if education and communications plans need to be adapted or developed the better to inform local stakeholders of the management objectives of the protected area |
| <i>Is the assessment of resource use in the protected area sustainable and does it contribute to effective conservation?</i> | <ol style="list-style-type: none"> Review responses to questions in the PA-BAT linked to resource uses Assess if the PA-BAT results and notes of the discussions during the PA-BAT workshop align with the management plan (e.g. spatial plans re resource use, timelines / seasonal use of resource, limits on resource use – limited off take etc) Review actions necessary to work with stakeholders to ensure sustainability and conservation of resource use (e.g. educational programme, joint monitoring, agreements re levels of resource, specific period of access to resource etc). In the example of Paklenica, this can be applied to the education programme of the importance of bats to the PA and the community. |
| <i>Are there important cultural, historical and spiritual sites in the protected area?</i> | <ol style="list-style-type: none"> Review the PA-BAT results and notes of the discussions during the PA-BAT workshop linked to the importance of cultural, historical and spiritual sites and activities Check if important sites are identified and management actions identified in spatial plans of the protected area Check if access to sites is permitted for specific activities related to cultural, historical or spiritual use Discuss conservation implications on sites Consider whether these sites/activities are adequately discussed in education/communication plans |
| <i>Have some values been identified by stakeholders as having potential to provide benefits (or increase benefits) in the future?</i> | <ol style="list-style-type: none"> Review the PA-BAT for all results and discussion where potential benefits were identified Assess whether any of these potentials match activities planned in the management plan: <ul style="list-style-type: none"> if so have any new ideas arisen which should be added to the management plan? If not should these potentials be further assessed/discussed/researched for inclusion in this or future plans? |
| <i>Engaging with stakeholders</i> | <ol style="list-style-type: none"> Review PA-BAT results and list of those who attended the workshop to determine whether there are any participants from the PA-BAT workshops who should be invited to follow-up meetings with PA manager and/or staff re current or future development of benefits from the protected area |