

# Pew Marine Fellows Workshop Handbook

## Overview

This handbook aims to increase Pew marine fellows' understanding of different types of conservation impact and help fellows explore opportunities to build or strengthen links between a fellowship project and policy or practice outcomes.

Developed by Leo Curran in collaboration with Laura Meagher, a consultant with the Technology Development Group, for the 2020 Pew Marine Fellows Virtual Cohort Workshop, the handbook has since been adapted for broader use.

## Key concepts and questions covered in this handbook

1. **Conservation impact:** What types of impacts do you hope your project will have?
2. **Context:** What is the political, social, or institutional context for your project?
3. **Impact pathway:** How will you achieve your desired impacts and project goals?
4. **Stakeholders:** Who are your project's key stakeholders, and what roles do they—or could they—play?
5. **Indicators:** How do you know you're making meaningful progress toward your goals?
6. **Critical reflection:** How do you take advantage of opportunities and address challenges?



## Conservation impact

This section offers a framework for thinking about conservation impact. We invite you to consider the range of impacts you might have as you work toward your fellowship goals.

**Impact:** An overall outcome or goal of proposed research. There may be more than one goal.

### Types of impact

- **Instrumental:** Direct use of research, products, or services in policy or practice.
  - **Example:** Use of fisheries model outputs in an allocation policy.
- **Conceptual:** New insights or increased awareness among involved individuals or groups about an issue of interest.
  - **Example:** As a result of a fellowship project, a fishery manager now thinks ecosystem-based fisheries management is feasible.
- **Capacity building:** Training, skill building, or strengthened collaborative abilities of involved individuals or groups.
  - **Example:** As a result of a fellowship project, community members learn how to use drones to monitor mangroves.
- **Attitude or culture change:** Positive changes in institutional cultures or group attitudes about knowledge exchange among representatives in the research, policy, and/or practice arenas.
  - **Example:** After several meetings with a fellow about the fellow's project on the status of sea turtles in marine protected areas (MPAs), an MPA management institution interacts with other sea turtle researchers more regularly to inform its management strategies.
- **Enduring connectivity:** Establishment of long-term working relationships between researchers and stakeholders, even after a project ends.
  - **Example:** Weeks, months, or even years after collaborating on an aspect of a fellowship project, a fisheries manager asks a fellow to participate in an ecological assessment of an MPA.

### Key points

- There are different types of impact beyond a policy or practice change.
- Some impacts can be processes, such as relationship building.
- Achieving impact takes time, but you can track interim impacts or early outcomes.

### Reflection questions

- What is/are my overall fellowship project goal(s)?
- What are at least three other interim impacts that I would like my project to have?
- Which impacts can I achieve fully during my three-year project, and which might come after the project is complete?



## Context

**This section invites reflection on how a project's context can support or hinder your ability to achieve an impact.**

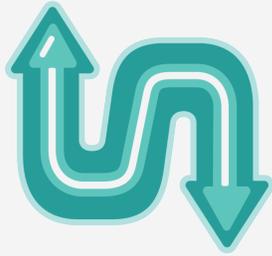
**Context:** The set of circumstances (people, places, events) that surround your project. Includes policy and institutional circumstances.

### Key points

- Context is important to consider because it shapes how impacts develop (or why they don't).
- Context creates both opportunities and challenges.
- Contextual factors are often things we can't do anything about. Sometimes the most we can do is find workarounds based on our understanding of context.

### Reflection questions

- What may be difficult or challenging about the setting in which I am working toward my goal?
- What is positive or enabling about the setting in which I am working toward my goal?
- How do I know (or how could I find out) these factors about the context of my project?



## Impact pathway

**This section describes how to create an impact pathway, a tool to map out your project's plan for impact. We anticipate that using this tool may reveal fresh opportunities and new challenges.**

**Impact pathway:** The steps and relationships that connect research to various types of impact. This is also known as a theory of change.

An impact pathway, or theory of change:

- Is your story of how you will make change in marine conservation.
- Explains your beliefs about how impact, or change, will unfold.
- Suggests how early and intermediate accomplishments set the stage for producing long-term results.

## Definitions of pathway components

**Output:** A tangible product or service produced from the project's actions. This could be something based on the research that is developed further for partners or others (e.g., a publication, scientific tools, processes such as new ways of engaging fishing communities).

**Outcome (interim impact):** A change that results from the project, and a precondition for the impact. This may include changes in knowledge, attitude, skills, relationships, or practices.

**Assumptions:** The beliefs we have about the project, the stakeholders involved, and how we think it all works.

**Stakeholders:** Individuals and/or organizations critical to achieving outcomes; may use project outputs in conservation efforts or to inform decision-making or resource management.

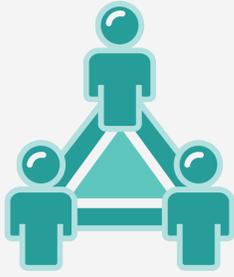
## Key points

An impact pathway:

- Is one approach for thinking through how you can achieve your project goal(s).
- Can help you identify and plan for interim impacts (outcomes).
- Can help you think through steps that are not yet clear.
- May reveal potential opportunities and challenges that have not already been considered.

## Reflection questions

- What do I find easy and what do I find challenging when thinking through an impact pathway for my project?
- What, if anything, have I learned about my project's assumptions?
- How can I address my assumptions (e.g., gather more information, talk to different stakeholders)?
- What, if any, opportunities or challenges have I revealed about my project?



## Stakeholders

This section suggests categorizing the types of stakeholders involved in your work to achieve impact, including who could help you in your efforts. We encourage you to think about your stakeholders' needs and ask yourself how you know what they need—or how you could learn what they need.

**Stakeholder:** A person, group, or organization that participates in progress toward impact. May be actively involved in or affected by a project.

Stakeholders may include people who:

- **Are affected:** These stakeholders are changed by your project but have little or no broad decision-making authority.
- **Are interested:** These stakeholders are curious or concerned about the project but have little or no broad decision-making authority.
- **Might have decision-making authority:** These stakeholders can make important decisions on the pathway to the project's goal, and their behavior is often most important to change.
- **Could help bring about change/impacts:** These stakeholders—such as collaborators, champions, or intermediaries—support your project's efforts.

A stakeholder may fit into one or more of these categories, or your project may work to shift a stakeholder from one category to another (e.g., an interested person becoming more willing to act as a champion and help bring about change).

**Engagement:** Planned activities or actions that enable early, sustained, and mutual interactions with stakeholders.

### Key points

- Consider the needs of your stakeholders—ask them what would be useful, and use tools and activities that fit their needs.
- Engage early and often with the most important stakeholders. Sustained engagement creates transparency and opportunities.
- Find help. You don't have to go it alone—look for champions, intermediaries, and collaborators.

### Reflection questions

- Am I engaging with stakeholders who can make decisions and bring about change?
- Who can help me work toward my desired impacts?
- How will I first engage my stakeholders?
- What tools or activities will I use to sustain engagement, and how do I know (or how could I find out) whether those tools and activities will work?



## Indicators

This section provides a framework for thinking about indicators of meaningful progress toward impacts. Using the definitions of different types of impacts, we invite you to identify indicators that suggest you are making progress on your impact pathway.

**Indicator:** A “step” or marker of progress moving toward a full-fledged impact.

### Types of indicators

- **Indicators of instrumental impacts:** Direct use of research, products, or services in policy or practice.
  - **Example:** A key national committee invites the researcher to present findings.
  - **Example:** The community’s council puts a talk by the researcher on its agenda.
- **Indicators of conceptual impacts:** New insights or increased awareness among involved individuals or groups about an issue of interest.
  - **Example:** A staffer writing a policy paper for the first time mentions the research topic (even very generally) in the context of environmental policy.
  - **Example:** A local community group begins discussing the research topic.
- **Indicators of capacity-building impacts:** Training, skill building, or strengthened collaborative abilities of involved individuals or groups.
  - **Example:** Local teenagers participate in a nature hike led by the researcher and ask questions.
  - **Example:** An organization invites the researcher to speak at a short course for fishers.
- **Indicators of attitude/culture change impacts:** Positive changes in institutional cultures or group attitudes about knowledge exchange among representatives in the research, policy, and/or practice arenas.
  - **Example:** A conservation manager visits the research site and listens to a brief presentation.
  - **Example:** Fishers are willing to share data with the researcher.
- **Indicators of enduring connectivity impacts:** Establishment of long-term working relationships between researchers and stakeholders, even after a project ends.
  - **Example:** Several tribal elders visit the research site and engage in friendly conversation; this becomes a regular occurrence.
  - **Example:** A policymaking midlevel staffer at first occasionally and then frequently asks for summaries of science when writing position papers for politicians.

### Key points

- Indicators can be representative steps of progress on your pathway.
- Tracking indicators can help you see meaningful progress on your pathway to impact.
- They may be indicators of processes, such as relationship building.
- Tracking indicators can help you write narratives about project impacts.

# Reflection questions

- What are the most important indicators that would suggest I am making progress toward my fellowship goal (e.g., genuine connection with an important stakeholder)?
- When in my impact pathway or project plan would I like to achieve those important indicators?
- Have I identified different types of indicators (e.g., conceptual, instrumental, enduring connectivity) that might help me tell a more comprehensive story about my project’s contributions?

# Indicators of Meaningful Progress Toward Impacts

Types of impact	Year 1	Year 2	Year 3	Longer term
<b>Instrumental</b> (direct use of research in policy or practice)				
<b>Conceptual</b> (new insights or increased awareness)				
<b>Capacity building</b> (training, skill building, or strengthened collaborative abilities)				
<b>Culture change</b> (positive changes in institutional culture among representatives in the research and policy or practice arenas)				
<b>Enduring connectivity</b> (establishment of long-term working relationships)				



## Critical reflection

This section offers a variety of actions (activities and tools) for reflecting on your project's progress and your efforts to achieve your desired impacts. We encourage you to identify actions that might work best for you, and when you might use these actions during your project.

**Critical reflection:** A continuing process of evaluating your project's progress by questioning assumptions, thinking through challenges, identifying opportunities, and clarifying lessons learned.

## Critical reflection actions

Specific to your Pew marine fellowship:

- **Pew project check-ins:** Annual call with the Pew fellows team about your project's progress, interim impacts, and Pew fellows community connections.
- **Pew project annual report:** Narrative and financial report typically due in February through the Foundation Connect system.
- **Cohort workshops:** Virtual or in-person workshops with your fellowship cohort in the first and second year of your fellowship, typically held the day before the annual meeting.

Other opportunities:

- **Personal indicator log:** A central location (e.g., notebook, computer file) for documenting indicators of impacts. May include quotes, emails, and other forms of verification.
- **Team retreat:** An opportunity for you and your team to dedicate time to a part of your project, such as a research approach, reflection on indicators, or discussion of desired impacts.
- **Focus group with stakeholders:** A facilitated meeting that invites stakeholders to reflect on opportunities and challenges of the design and use of your project's outputs.
- **Advisory group meeting:** A meeting of trusted colleagues and advisers to reflect on your project and offer feedback on progress and opportunities for impact.
- **Trusted friend/mentor discussion:** One-on-one conversation with a trusted colleague or mentor who can ask thoughtful questions about your project's progress and opportunities for impact.
- **Peer mentoring/networking discussions:** Connections with Pew marine fellow community members or other colleagues to discuss your project's progress, garner feedback on project elements or impacts, and share lessons learned.
- **Other:** Anything else that will allow you to reflect on your project's progress toward impacts throughout your fellowship.

## Key points

- Critical reflection tools can help you capture meaningful progress, work through challenges, identify opportunities, and clarify lessons learned.
- The workshop activities have started some critical reflection on your project.
- Critical reflection means that you ask yourself and others challenging questions about the project.

## Reflection questions

- What questions would I want a trusted friend or mentor to ask me about my project?
- Do the questions I need to reflect on vary in different years of the project?
- What tools or approaches am I most likely to use to reflect on my project's progress?

## Approaches to Critical Reflection

Question	Action	Schedule

# Reflection questions

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