



GLOBAL
LANDSCAPE
STEWARDS

STEWARDSHIP EXCHANGE HANDBOOK

A GUIDE FOR PLANNING AND FACILITATING INTERNATIONAL
PEER EXCHANGE AMONG STEWARDSHIP PRACTITIONERS

2023

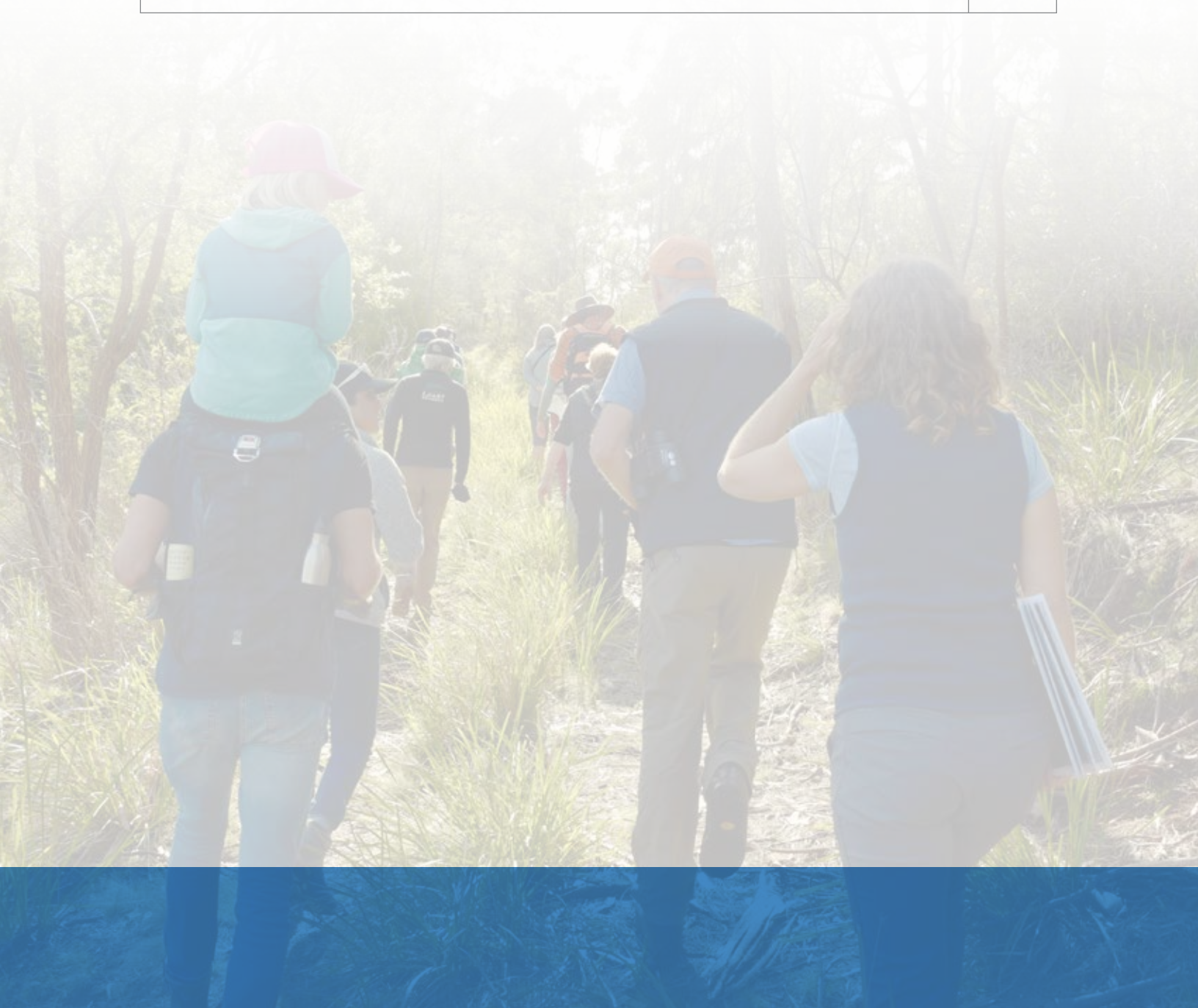




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INTRODUCTION: ENHANCING THE POWER OF PEER EXCHANGE

WHY PEER EXCHANGE?

Peer exchange is a powerful tool for sharing lived experience, perspectives, knowledge, and solutions across individuals, organizations, and communities. Instead of reinventing the wheel by working in isolation, dialogue and experiential learning enhances relationships, fosters mutual understanding, and enables new ideas to emerge in ways that are often not otherwise possible.

In October 2022, 10 landscape stewardship practitioners from the United States co-convened a peer exchange in Australia (the 2022 Australia Exchange) with dozens of local conservation and stewardship practitioners. Together, we explored ways to weave together a diverse network of on-the-ground stewardship leaders in two different countries to increase the pace, scale, and effectiveness of our shared work. Through three weeks of meetings, conversations, events, and time together in Eastern Australia, we built relationships, catalyzed connections, and identified a range of best practices. Post-exchange evaluative interviews with 23 participants indicated that our time together had profound effects on both the individuals and their organizations, created new connections, and tangibly enhanced our varied stewardship efforts.

Based on what we learned, we created this handbook as a resource for those considering similar international exchanges among stewardship practitioners. In it, we provide specific guidance for creating an experience that leads to long-standing, meaningful relationships that support this work across different cultures, landscapes, and sectors.

Each section of this handbook includes insights from 2022 Australia Exchange participants and questions to consider when preparing for your own exchange. It is broken into sections, starting with guiding principles, then moving into essential planning elements, logistical considerations, and tools. These are followed by a step-by-step process for facilitating the exchange itself. It concludes with what to do after the exchange, including demonstrating and amplifying its impact through storytelling, continued dialogue, and tangible next steps.

It is our hope that this handbook will be a useful guide for future global landscape stewardship exchange efforts—not only for practical logistical considerations, but also, for how to enhance the impact of connecting stewardship practitioners across cultures and continents. As a living document, it will continue to evolve as additional exchanges are conducted and new lessons are learned.

GUIDING PRINCIPLES

Effective peer exchange can be approached in many ways. Regardless of how you go about it, it is important to first identify your core intentions and to make sure they are appropriate for the cultures, people, and places involved. The following guiding principles are intended to help you create effective, ethical, and meaningful international stewardship practitioner exchanges.

- **Center relationship-building.** Effective peer exchange requires trust and openness. Working to build and strengthen relationships among participants early on will result in more candid and in-depth connection before, during, and after an exchange. Intentionally creating opportunities for relationship-building when crafting your exchange design and pacing will help participants develop a personal foundation upon which they can continue to build.
- **Strive for co-creation.** Establishing shared goals and desired outcomes and working together to create a program to meet them will help ensure a meaningful experience for all involved. Determining relevant challenges, opportunities, and core themes in advance will also help focus shared in-person time and identify other resources (e.g., people, experiences, literature) each participant may want to bring to bear. Working together in this way also helps clarify expectations around the exchange's value.
- **Engage with curiosity and respect for differences.** From initial outreach to engaging in an immersive, place-based exchange, curiosity and respect for participants' diverse experiences and perspectives are essential. Prioritizing listening and asking thoughtful questions can promote dialogue and deepen relationships. Recognizing and respectfully acknowledging differences in ways of knowing, experiences, values, and identities builds the trust that enables people to fully participate, which results in a more inclusive and relevant exchange.

WHO ARE “STEWARDSHIP PRACTITIONERS”?

Stewardship practitioners are “doers,” people who work to care for and restore nature and foster the relationships needed to work across boundaries and at scale. Central to collaborative stewardship, they are directly connected to the people and places where that work is happening.

- **Connect to place.** While talking about the practice of stewardship is important, experiencing the landscapes and activities where work is happening has benefits that cannot be replicated remotely or through conversation. Directly engaging with a place promotes stronger relationships and a deeper and more nuanced understanding of the challenges and solutions being discussed.
- **Aim for quality over quantity.** It is tempting to try to fit in as much as possible. However, having a too-full itinerary can limit the energy you have to deepen relationships, absorb information, and sustain a days- or weeks-long exchange. It also does not leave time for impromptu invitations from your hosts. Plan unstructured free time (~20% to 50% of the itinerary) for rest and reflection as well as for the kinds of informal connections that facilitate candid personal exchange and forge longer-lasting relationships.
- **Be flexible and adaptable.** International travel is likely to present unanticipated challenges and opportunities. Weather, current events, and shifting personal and professional circumstances may all come into play. Being willing to adapt your plans as needed will help to make the most of an exchange experience, support the participation of those you meet along the way, and enable you to take advantage of unexpected opportunities.
- **Embrace fun!** Engaging in fun, unstructured activities with your hosts and fellow travelers adds character to an exchange and creates connections and memories that are often not possible in purely professional settings. Humor can also help participants be more open, vulnerable, and joyful, even when engaging in difficult conversations.



PHOTO: SHARON FARRELL

PLANNING THE EXCHANGE

Preparing for a several-day or weeks-long peer exchange with multiple organizations and stewardship practitioners can be daunting. Add to that the complexity of unfamiliar cultural customs, myriad travel options, and inevitable logistical constraints and you may feel somewhat overwhelmed.

The following sections address what we found to be key exchange design elements that need to be considered. They explore how to select, invite, and engage participants; how to design and refine an itinerary; and how to budget and book lodging, transportation, and events to create a smooth and meaningful experience. Each section includes planning recommendations, guiding questions, and practical lessons from the 2022 Australia Exchange.

Convene a Core Team and Invite Participants

Establishing a capable core planning team is essential to the creation of a well-designed, integrated, and meaningful experience. In addition to the individuals invited to participate and the resources available to support the experience, this team's composition will shape both your approach and possible outcomes. We suggest the following steps for convening an effective core team to lead the exchange as well as for selecting participants.

Step One (12 to 18 months in advance): Identify and recruit a core team. To help ground the planning process and determine if there is enough interest and value to proceed, it is essential to identify and speak to individuals dealing with similar challenges that lend themselves to exploration through an exchange. These conversations are a critical part of the process and should be led by a core team.

The core team may consist of as few as two or as many as 10 or more individuals, depending on the size and scope of the exchange. Whether you choose a vertical or a horizontal organizational structure, we recommend having at least one person in a coordinator role (see Select a Coordinator). Distinct roles and responsibilities for other team members during the planning, execution, and post-exchange periods are also critical for setting clear expectations and helping the process go smoothly.

While core team members can come from almost anywhere, they should possess relevant knowledge, experience, skills, cultural competencies, and vision to meet your exchange goals. It is extremely helpful to include people who are familiar with the participants, locations, and cultural contexts at your destination. The 2022 Australia Exchange core planning team ultimately included 13 individuals, including several well-connected Australian team members. As an unexpected benefit, much of the relationship-building that flowed from the 2022 Australia Exchange came from the coordination efforts of hosts and core team members before the exchange took place.

Depending on the focus of the exchange, it may also be important to include core team members who have specific experience or backgrounds. For example, an exchange with a key theme of Indigenous stewardship practices would benefit from having several Indigenous core team members.

The core team's composition can change over time as plans evolve. Reaching out to other landscape stewardship organizations, partnerships, and networks is a good way to identify additional people you may want to include.

While each core team member will bring different strengths, at a minimum they should collectively be able to:

- establish shared goals for the exchange;
- take the time needed to plan and participate in the exchange;
- be flexible, adaptable, and collaborative;
- foster authentic relationships, manage conflict, and communicate across different cultural contexts;
- foster an accessible, inclusive, and joyful culture;
- fundraise or leverage organizational funds to support the exchange;
- build and responsibly manage an accurate budget;
- manage planning and logistics, including itinerary development, bookings, and travel; and
- create effective and engaging communications materials.

CONVENING A CONNECTED CORE TEAM

Several 2022 Australia Exchange core team members were invited because of their existing connections to local conservation efforts. For example, after identifying Indigenous stewardship as central to many conservation efforts in Australia, the core team grew to include two Indigenous practitioners, and the itinerary and planning process shifted to respond to their interests and needs. Many of the relationships and conversations that were fostered during the exchange would not have been possible without their participation.

Identifying core team member roles and responsibilities early on will help strengthen relationships, streamline planning, and provide accountability and coordination. The core team for the 2022 Australia Exchange met weekly/biweekly for one year, with two in-person planning workshops and several additional virtual planning sessions. It may also be helpful to establish subgroups within the core team that can meet separately to focus on details such as fundraising, logistics, outreach to potential participants, and overall coordination.

Step Two (12 months in advance): Identify and begin relationship-building with potential participants. As you are building your core team, it is also helpful to start reaching out to people and groups you may want to meet with during the exchange. This sometimes-lengthy process can lead to many new ideas for topics, people, and places to explore, so starting early is a good idea. As with core team members, these individuals should be well connected to the people, places, and themes that might be a part of the exchange. These conversations can also be a tool for gauging interest and identifying additional core team members, potential participants, and resources. As with forming a core team, outreach to prospective participants is also an opportunity to set clear expectations around shared goals, outputs, expected time and resource contributions, and roles and responsibilities.

GUIDING QUESTIONS: BUILDING A CORE TEAM

- **Who has the time and capacity as well as the key skills, experience, and connections to plan, facilitate, and participate in an exchange?**
- **What kind of team culture do you want to create? Who has the attributes and personality traits that support that culture?**
- **What resources or support do core team members need to enable them to participate?**
- **Are core team members connected to organizations, partnerships, networks, and local communities where the exchange is being held?**

Our core team interviewed dozens of Australian stewardship and conservation leaders, querying their interest in participating, potential themes, and people to include. Members of international conservation organizations, such as the International Land Conservation Network and the International Union for Conservation of Nature, were also on our initial outreach list. These outreach interviews helped identify many of the people and places that would eventually be included, as well as key partners willing to co-sponsor and host exchange events. Moreover, issues raised during these initial conversations and the evolving contact list provided topics that would be discussed during the exchange. Relevant background resources were also identified, enabling participants to read up on local and national issues, project case studies, upcoming events, and other opportunities for connection prior to the trip.

Tapping into our Australian colleagues' existing networks rather than trying to create one from scratch enabled quicker and better connections with local stewardship practitioners and support organizations. It also led to the expansion of the core team to include several Australian partners who agreed to serve a significant coordination role in both planning and facilitating the exchange.

Step Three (three to six months in advance): Invite additional participants. Once a core team is established, outreach interviews have been conducted, and the planning process is well underway, it is time to consider additional participants to invite. Base your choices, which should fill gaps in the core team's expertise, on your emerging understanding of the exchange's content, cultures, and needs. Ideally, exchange participants will bring diverse and relevant experience and perspectives. For example, Indigenous participants involved in the 2022 Australia Exchange found it particularly meaningful to meet and engage with other First Nations people and organizations.

Selecting who to invite also involves a consideration of their interests and availability, logistical constraints, and resources available to support their involvement. Some participants may need financial support, especially those who are not affiliated with a larger organization. We advise setting aside funds to underwrite the participant diversity that is inclusive of more perspectives and generates greater impacts, creating a richer exchange.

Participants may be invited to join for the entire exchange or for individual conversations and activities. Sharing a draft itinerary (see Appendix A) can help prospective participants identify the opportunities best for them. Being open to changing the itinerary will also allow them to make suggestions that enhance the overall experience.

GUIDING QUESTIONS: INVITING PARTICIPANTS

- **Who has the experience, knowledge, and interest to meaningfully engage in the exchange’s core themes?**
- **What perspectives and backgrounds are needed to have productive conversations around the topics you hope to explore?**
- **What kinds of events and conversations will add value for potential participants?**
- **Does the participant list include diverse perspectives, experiences, and skills? Is there variety in opinions, cultural contexts, and worldviews?**
- **Are prospective participants capable of respectful exchange across cultural differences?**
- **Will the exchange be beneficial, accessible, and culturally safe for participants from diverse backgrounds? What is needed to ensure these conditions?**

Select a Coordinator

Having a coordinator, a critical central point of contact for the core team and participants, smooths the overall planning process considerably. Ideally, this person is detail-oriented; skilled at facilitation; and can respectfully bring people together across differences in cultures, perspectives, and experiences. This function can be handled by a core team member or by someone brought on specifically for this purpose, but in either event, it is a role that should be filled as soon as possible in the planning process.

Depending on the location, scope, and duration of the exchange, it may be ideal to have two coordinators, one of whom is connected to the region(s) where the exchange is taking place. Core team members and partner organizations may also be able to offer capacity and expertise to support coordination. Consider hiring an assistant or co-coordinator to share the workload, which will allow the coordinator(s) to participate more fully alongside core team members.

Coordination needs for in-person stewardship exchanges may include:

- reaching out to partners and prospective exchange participants;
- researching locations, organizations, and people to include in the exchange;
- scheduling and facilitating regular planning meetings with the core team and partners;
- developing and confirming itineraries, including identifying and booking lodging, meals, transportation, and events;
- developing systems to manage logistics, budgets, and receipts throughout the exchange;
- facilitating team development and relationship building;
- managing logistics and group dynamics during the exchange;
- considering and managing health and safety concerns for core team members and participants;
- conducting ongoing coordination with core team members, partners, and exchange participants;
- establishing expectations around and responding to media inquiries;
- coordinating post-exchange activities, including summarizing learnings, hosting virtual forums, and advancing agreed-upon actions; and
- maintaining and strengthening connections made during the exchange.

Create an Itinerary

In addition to the basic organizational and tracking benefits it can provide, the process of creating an itinerary can help build agreement about what the exchange will include, who to invite, and how it will be facilitated. The work already done to determine your themes and goals as well as people and places you think you want to include (see Steps One and Two) will not only help you set an itinerary but also, prioritize options.

Taking an iterative approach enables the core team members most familiar with where you're going to confirm that what is being proposed is feasible and likely to provide the experiences you hope for. (We went through at least 10 revisions before landing on a final 2022 Australia Exchange itinerary.)

We also suggest creating two versions of the final itinerary. One version provides an overview of the entire exchange and can be shared with all participants as well as others who would benefit from a broad understanding of your plans. The second is a day-by-day version that captures important details, including event or meeting locations, lodging, transportation, and key contacts. This version (or relevant parts of it) can be shared with core team members and hosts who need those details. (A sample itinerary for the 2022 Australia Exchange can be found in Appendix A.)

The following considerations are shared here to help you create an experience that is both doable and rewarding. They also include ways to plan your exchange to meet the intentions set forth in the Guiding Principles section of this document.

- ***Construct the itinerary based on core themes and goals, local recommendations, and available time.*** You will likely have more great ideas for things to do and places to go than you can realistically accommodate. Ensuring that each activity is relevant to the themes and goals of the exchange will help you choose among your options. With clear goals in mind, local hosts and participants can more easily co-create an effective itinerary and help identify logistical constraints (e.g., travel times) that will affect how much you can do.
- ***Balance breadth with depth.*** Including many themes, participants, and places can add richness and dynamism to an exchange, but packing too much in can dilute the experience. Having more time in each place helps participants build longer-lasting connections, dive more deeply into individual topics, and learn about transferable tools and best practices. It is important to strike a balance between a diversity of activities that support participants' various learning styles, interests, and backgrounds and allowing enough time to reap these other benefits. After traveling to a new location every three days during the 2022 Australia Exchange, nearly everyone suggested that traveling less frequently and spending more time in each place would have been a more sustainable pace and would have allowed them to deepen connections.

- ***Allow space for participants to form groups, make informal connections, and rest.*** Unscheduled time allows core team members and participants to interact on a more personal level and can engender a culture of openness, learning, and mutual respect. Explicitly building downtime into your itinerary also helps manage expectations about when work needs to happen and create a sustainable pace that supports consistent engagement. Including several days at the beginning of the 2022 Australia Exchange for core team members to connect in a relaxed setting helped them gel as a cohort and get to know one another better, setting them up for success.
- ***Include time to debrief, write, and reflect.*** Core team members will likely engage with a wide range of people, data, and ideas throughout the course of an exchange. Including time to debrief, write, and reflect will help them make sense of new information, allow insights to emerge, and document ideas in a way that ensures that lessons from the exchange are carried forward.
- ***Match the itinerary to participants' needs and preferences.*** Polling core team members and participants to identify travel preferences, personal needs, preferred pacing, and shared interests can help ensure that the itinerary supports their sustained participation. Hosts and participants should be consulted when planning events scheduled for weekends, holidays, or otherwise outside of normal working hours.
- ***Build in flexibility.*** Creating an itinerary that includes multiple options for specific time slots allows participants to choose topics most relevant to their interests and experiences. It's okay to split up into smaller groups, engage in parallel events, and/or offer optional activities. Having alternatives in case plans change or people are suddenly unavailable is also wise.

GUIDING QUESTIONS: BUILDING AN ITINERARY

- **Is the itinerary grounded in the exchange's core themes and goals as well as participant interests?**
- **What is the balance of formal connection, informal connection, and free time? productive conversations around the topics you hope to explore?**
- **Is time to debrief, write, and reflect included?**
- **How much time will be spent traveling versus immersed in a place?**
- **How much time will be spent with each exchange participant and host?**
- **Do the activities support a shared exchange of knowledge as opposed to a one-way flow?**
- **Are the activities, conversations, and events accessible for the desired exchange participant (consider cultural contexts, experience, ability, and knowledge)?**

Budget and Book for Success

Concurrent with creating an itinerary and inviting additional participants, it's also important to start to create a budget and book lodging, transportation, and events. Rather than providing a basic primer on budgeting, the following tips from our 2022 Australia Exchange highlight specific insights we gained during this process.

Creating a Budget

We recommend an iterative process that refines an initial draft version over time, including during the exchange. Initially, the budget can simply include the main categories of anticipated costs (see Appendix B), with later versions going into more detail.

- Find out how people prefer to travel. For example, for the 2022 Australia Exchange, we made sure core team members had their own rooms for personal and health reasons. This increased the original budget, which had assumed that rooms would be shared.
- In-country hosts or those who travel frequently to the location(s) where the exchange is taking place are invaluable for ground-truthing cost estimates, identifying additional costs you may not have considered, and recommending places to go (or avoid) that are within your budget.

- It's wise to allocate an additional 5% to 10% of the budget for contingencies. Despite precautions, more than half of the 2022 Australia Exchange core team contracted COVID-19. This led to unanticipated transportation and lodging costs, only some of which were covered by travel insurance. We recommend purchasing travel insurance, but make sure your policy explicitly covers costs incurred for changes like this made *during* the trip, which not all of them do.
- Do not forget to include support for a coordinator's time planning and facilitating the exchange if that is not otherwise covered. We also recommend considering supporting hosts and in-country partners' time when possible.

It is imperative to create clear expectations about which costs are covered by the exchange and which need to be covered personally or by participants' organizations. We used participant agreements for the 2022 Australia Exchange core team (see Appendix C) that specifically addressed this detail.

Finally, it is also important to be clear with exchange partners about how payments will be made for shared costs. For example, our Australian colleagues booked our lodging, transportation, meals, etc., then sent us an invoice covering payments made on our behalf to help us account for costs we did not directly pay for. This not only assisted in budgetary tracking but also, ensured transparency regarding our mutually agreed-upon financial responsibilities with exchange partners. In our experience, this worked well and supported our goal to build and support relationships vital to the exchange's success.

Booking

Like any type of travel, when it comes to booking air fares, lodging, and transportation, timing is crucial and depends on several factors, including location, exchange-rate fluctuations, cultural norms, and group size. The tips that follow include things unique to making bookings for a group going on a trip of this type.

- In-country hosts and partners are your best sources of information regarding travel and accommodation options, the best times to book, and how to prioritize booking.

- Locations without solid internet or phone connections can be slow to respond, and some places do not take reservations. In those situations, allow extra time for booking and have alternatives in mind.
- Book directly with airlines and accommodations rather than through a third-party travel site; this makes it easier to change reservations or secure refunds if that becomes necessary.
- Because air fares and seat availability can fluctuate significantly, it's wise to purchase tickets well in advance, particularly for international flights. By booking five months ahead of time, we were able to get our full group on the same flight. For domestic flights, a two-month lead time worked well (30 days before the start of our trip, several flights were sold out).
- Hired buses, rental cars, and train and shuttle tickets on busy routes should also be secured well in advance, but less-busy options can be purchased during the exchange or even on the day of travel.
- Some venues—for example, individual conferences or parks—may require booking far in advance. Pay special attention to these kinds of restrictions as you make your plans.

Bookkeeping and Receipts

We recommend dedicating one or two core team members to tracking costs and receipts as well as keeping the budget current. During the 2022 Australia Exchange, we kept all paper and/or digital copies of receipts and updated the budget daily. Knowing where we were within our budget was especially helpful as we accrued unanticipated costs.



PHOTO: RICHARD SNASHALL

FACILITATING THE EXCHANGE

This section lays out some of the many factors to consider when facilitating a multi-day/-week international exchange, including how to:

- prepare participants for the experience and set expectations;
- facilitate effective events and activities, manage logistics, and address group dynamics;
- communicate about logistics;
- make adjustments during the trip; and
- follow up after the exchange to determine its impact, continue fostering new relationships, share key insights and tools, and invite feedback to improve future exchanges.

Before the Exchange

A variety of materials and virtual events can be used to help establish expectations and begin building relationships. Ideally, core team members and hosts work closely to develop these. A packet that included items listed below was very useful for the 2022 Australia Exchange. It was also distilled into a simpler version for participants who were only involved in certain parts of the trip.

A pre-trip information packet may include:

- an introductory letter with an overview of the exchange's origins, goals, and anticipated outcomes;
- the master itinerary, which provides a high-level overview of the exchange;
- day-by-day itineraries with detailed information about activities, transportation, and lodging;
- core-team-member and partner biographies;
- background information (e.g., briefings, presentations, publications, media, websites) on places, organizations, projects, and themes that will be explored during the exchange;

- a suggested packing list; and
- relevant health protocols (including COVID-19 risk mitigation if appropriate).

Arranging opportunities for participants, hosts, and core team members to connect virtually before the exchange goes a long way toward starting to build relationships and a sense of curiosity and excitement about meeting in person. These may include informal meet-and-greets, thematic discussions, or formal webinars. Direct connections based on shared interests and experiences also have an additive value. For example, Indigenous participants in the 2022 Australia Exchange suggested that they would have benefited from additional opportunities to connect with one another before meeting face to face.

The following list of additional pre-exchange considerations includes things we found to be important to the 2022 Australia Exchange's ultimate success.

- A balance of context-setting, information-sharing, formal conversation, and informal connection facilitated a true exchange of ideas, tools, and lessons.
- Given that the core team participates in the entire exchange, it was important to manage host and participant expectations regarding what that team had time or energy to sustain, given all the other commitments they had.
- Even if core team members already know one another well, they are unlikely to have traveled or worked together in such an intense, ongoing way. This makes it even more important to carve out time for them to connect through virtual or in-person meetings and one-on-one time before the exchange starts. For the 2022 Australia Exchange, the coordinator met individually with each U.S. core team member in a confidential and informal setting to understand their expectations and goals.
- During the 2022 Australia Exchange, ongoing concern about COVID-19 introduced specific health and safety considerations to day-to-day activities. While the issues created by this particular pandemic may change, planning should include how you want to handle illnesses in general. Make sure people know they can opt out if they are unwell or concerned for their safety.

We recommend scenario planning how to handle the needs of those who become ill and resulting changes to the group's plans.

- While not mandatory, small, easy-to-carry gifts such as organizational “swag,” crafts from local artists, or other items representative of your home area are a nice gesture to local hosts and others you meet along the way.

During the Exchange

While preparation is important, effectively facilitating logistics, relationship building, and healthy group dynamics during your time together is equally critical. While you should have already established overall team member roles and responsibilities, it is also very important to clearly identify all the tasks that will come up each day and to distribute them based on skills, experience, and capacity. These may include:

- tracking expenses,
- paying for things not booked ahead of time,
- choosing places to eat and making reservations,
- arranging taxis or other group transportation,
- facilitating or speaking at the day's events,
- communicating with co-hosts and/or partners, and
- responding to any emergencies and challenges that arise.

With so many things to do and track, we recommend identifying at least two people from the core team who will work together to manage them. Roles can be reassigned over the course of the exchange to even out the workload, or a team of three or four people could take turns. This also provides redundancy in case an individual can no longer fulfill their role. In the case of group health, safety, and morale, designating two core team members to specifically respond to unanticipated incidents or challenges can be critical.

Whatever the structure, individuals assigned these tasks should check in with one another daily. This includes reviewing the next day's itinerary to make sure the group is prepared for what's coming and identifying outstanding logistical needs (e.g., booking taxis, meals, communicating with partners, etc.). Taking time to regularly check in with each core team member, partners, and hosts also helps

maintain healthy group dynamics and adjust to challenges and opportunities as they arise.

Consistent communication among core team members and partners is essential. We found the following practices particularly helpful.

- Before meeting, contact each partner or host to identify and address any last-minute needs or changes.
- For informal communication among core-team members and to share time-sensitive information such as last-minute itinerary changes, establish a core-team group chat via text, WhatsApp, or another platform.
- Create a central online repository for materials, notes, pictures, and contacts as well for cataloging post-exchange follow-up actions.

The core team regularly took part in debriefing sessions to digest the day's events, troubleshoot any challenges, walk through the next day's itinerary and logistics, inform the team of any changes, and make adjustments based on how everyone was feeling. These meetings were also a great time to synthesize and capture key themes, lessons, or tools and to make sense of our experience as a group. Encouraging core-team members to regularly journal and take notes can help prime these conversations, though some will be more inclined than others to do this.

After the Exchange

If done well, an exchange will forge new relationships and strengthen those that already existed, catalyze mutually beneficial next steps, and proliferate best practices in ways that benefit its participants long after it is over.

The 2022 Australia Exchange core team identified more than 100 immediate follow-up actions, including connecting participants with people and organizations not involved in the exchange, sharing resources discussed, having additional conversations to dive deeper into specific topics, and identifying opportunities for upcoming events. A spreadsheet or document to track follow-up actions, communications, and contacts was a necessary tool for ensuring that these items were remembered and delivered upon. Because everyone returns to their busy lives after the exchange, it's important

COMMUNICATING OUTCOMES: A SAMPLE SUMMARY REPORT

The summary report from the 2022 Australia Exchange can be accessed on the Global Landscape Stewards webpage – <https://www.stewardshipnetwork.org/global-landscape-stewards/> – and serves as one example for how to share the learnings and outcomes of a stewardship exchange with exchange participants, stewardship practitioners, and a wider audience.

to provide easy opportunities to coordinate follow-up actions through ongoing meetings and debrief sessions, which also helps promote accountability and follow-through.

Debrief interviews with selected exchange participants helped us evaluate the 2022 Australia Exchange's impacts and identify opportunities to strengthen future events. These conversations explored highlights from the experience, what they felt had been created by the exchange, how we might improve future exchanges, and ideas for follow-up actions. Ways to maintain relationships created during the exchange may include informal conversations, webinars on specific topics and tools, piggybacking meetings onto other events, and planning additional in-person exchanges.

Telling the story of the exchange is one way to meet the goal to share lessons, insights, and inspiration from the experience with partners, organizations, and community members back home. This may include:

- a summary report,
- short articles in newsletters or annual reports,
- webinars and workshops,
- visual or written media (which may require photo releases),
- social media,
- virtual or in-person events, and
- contributions to this handbook's updates.

Finally, thank-you notes and/or gifts for co-hosts and participants to acknowledge their time, energy, and generosity are wonderful ways to end the exchange.



PHOTO: SHARON FARRELL

APPENDIX A

2022 AUSTRALIA EXCHANGE: SAMPLE ITINERARY

Example Day:
Thursday,
October 20, 2022
Arrive in Tasmania

Objectives for the day:

- Travel to Tasmania
- Explore the work of the Tasmanian Land Conservancy (TLC) at Tinderbox Hills Reserve

Themes explored:

- Private land conservation efforts in Australia
- Fire resilience
- Urban stewardship

Main partner contacts:

- Phillip Laroche, Tasmanian Land Conservancy (mobile phone number)
- Jessie Bodor, Tasmanian Land Conservancy (mobile phone number)

7:00 Breakfast

Bridgewater Apartments

8:00 Depart for Brisbane Airport

Travel via taxi to the Brisbane International Airport.

9:40 Fly to Tasmania

Virgin Australia VA702

Depart: Brisbane (BNE): 9:40am

Arrive Hobart (HBA): 1:30pm

14:30 Depart Hobart Airport for TLC's Tinderbox Hills Reserve

Travel via charter bus to Tinderbox Hills Reserve, ~45 minute drive.

Transfer details: Coal River Coaches, P: (03) 6272 2645.

15:00 Visit TLC Tinderbox Hills Reserve

Walk and talk about reserve management, community programs, and threatened species, starting with welcome talk and afternoon tea on arrival. Portaloo is onsite; 1 km gentle-moderate climb on uneven fire trail through forest.

What to bring / wear

- *day packs with water bottles; bottled water can be provided if required, please confirm*
- *sturdy walking boots with good grip*
- *rain jackets*
- *long sleeve clothes tops and bottoms suitable to conditions on the day – check forecast for Blackmans Bay beforehand*
- *sunglasses*
- *optional binoculars for birdwatching*
- *optional snacks*
- *TLC will supply afternoon tea, sunscreen, sanitizer*

17:00 Transfer 30-minute drive to ibis Styles Hotel and check in

Check in to ibis Styles Hotel.

18:30 Dinner, drinks, and conversation at TLC Office

TLC Office, 183 Macquarie St. Hobart, a short walk from our hotel. Enjoy an evening of socializing and exchange over food and drinks.

20:00 Parting words for the day/instructions for Friday

APPENDIX B

2022 AUSTRALIA EXCHANGE: BUDGET TEMPLATE & ESTIMATED COSTS

ITEM	USA \$ UNIT COST	AU \$ COST (1:1.44)	NUMBER OF PEOPLE	NUMBER OF DAYS (ASSUMES 4 WKS; 2.5-3 AU, 1 TAS)	US \$ TOTAL
Flights (international)	\$1,350	\$1,944	10		\$13,500
Flights (within AUS); anticipate 5	\$1,095	\$1,576	10		\$10,950
Van/bus travel	\$15,000	\$21,600		15	\$15,000
Rental car & gas	\$600	\$864		8	\$4,800
Lodging	\$150	\$216	10	30	\$45,000
Food	\$85	\$122	10	30	\$25,500
Visas, permits, entry fees, equipment	\$450	\$648	10		\$4,500
Convening support & trip gear	\$3,250	\$4,680			\$3,250
Gifts for hosts	\$1,500	\$2,160			\$1,500
Special event/ conference invitations/in-country comms	\$4,000	\$5,760			\$4,000
Branding, pre-trip communications	\$3,000	\$4,320			\$3,000
Misc (recreation, COVID testing, events)	\$1,000	\$1,440	10		\$10,000
Travel insurance	\$500	\$720	10		\$5,000
				Subtotal	\$146,000
				5% Contingency	\$7,300
				TOTAL	\$153,300

APPENDIX C

2022 AUSTRALIA EXCHANGE: CORE TEAM PARTICIPANT AGREEMENT

Global Stewardship Exchange Participant Agreement

(Note: The focus of this agreement is on logistics, funding/ expenses, liability, and accountability. A second agreement focused on shared intentions and values will be co-created with all the Exchange participants by April 30, 2022)

Background: The Global Stewardship Exchange (Exchange) concept was created through a partnership of the [California Landscape Stewardship Network](#), the [Center for Large Landscape Conservation](#), and [The Stewardship Network](#). The Exchange's anticipated goals, desired outcomes, approach, and geographic focus is summarized in the draft [project overview](#). The first phase of the Exchange will be in Australia, Tasmania, and New Zealand. This phase will be divided over two 3–4-week trips in fall 2022 and spring 2023.

Funding for the first phase is through a grant between the Gordon and Betty Moore Foundation and The Stewardship Network and funds provided through the Golden Gate National Parks Conservancy to the League to Save Lake Tahoe by two philanthropists. Continued fundraising is being undertaken by Exchange participants, to include Phases Two (South America) and Three (Europe).

Terms of the Agreement: This Agreement is for the fall 2022 Exchange (October 13th, 2022–November 8th, 2022).

Approved Expenses: The funding received through the above grants and donations will provide the following to the undersigned participant:

- Air, rail, bus, and vehicle transportation for all travel from the participant's residence to Australia (and return), and subsequent in-country travel. [Note: These will either be booked through a travel management service or coordinated directly through either The Stewardship Network or the League to Save Lake Tahoe. The one booking exception may be the international airline ticket, which may be purchased by the participant through the issuance of a travel stipend; the ticket must be purchased by no later than 14 days prior to the departure date.]
- Visas, travel permits, entrance fees, and all COVID risk-reduction requirements, including required testing.
- Hotel and other accommodations, to include room cost and taxes. (Note: Unless otherwise agreed upon, room service will not be compensated through the Exchange.)

- Breakfast, lunch, and dinner meals as a part of the Exchange activities.
- Pre-approved materials and equipment required for active participation during the Exchange.

Excluded Expenses:

- Personal expenses incurred during the trip (e.g., souvenirs, recreational activities, etc.)
- Family member air, rail, and vehicle transportation other than in-country bus travel.*
- Family member accommodations if other than in rooms reserved for the participant (i.e., family members are welcome to stay in the same room as their respective kin).*

Liability: In committing to participate in the Global Stewardship Exchange, the participant assumes the associated risk, such as loss or injury in related travel, as well as any expenses not specified above. By signing below, the participant agrees to hold harmless The Stewardship Network, the League to Save Lake Tahoe, and any funders of and other participants in the Exchange.

Attendance & Contributions: The participant will attend and actively participate in the Exchange as described in the final itinerary ([link to current draft, here](#)). This includes engaging in and, at times, helping lead or facilitate hosted convenings, contributing to and cultivating relationships, joining field trips, speaking at events, delivering presentations, providing pre-trip materials and resources, supporting trip logistics, and preparing/reviewing post-trip materials (these will be emergent, and could include podcasts, presentations, white papers, or other ways to share learnings).

Agreed:

I acknowledge and accept the terms of the Global Exchange Policy Agreement, as described above.

Name & Organization

Signature & Date

*Family members are welcome to participate in the Exchange and will be accommodated/integrated in activities and meals to the greatest degree feasible. If considering bringing family member(s), please notify the team by no later than May 1, 2022, to discuss logistics and feasibility.



**GLOBAL
LANDSCAPE
STEWARDS**

This handbook was created by Global Landscape Stewards with contributions from the Australian Land Conservation Alliance, Great Eastern Ranges Initiative, and the Lincoln Institute for Land Policy. It was made possible with generous support from of The Gordon and Betty Moore Foundation and The Stewardship Network.

www.stewardshipnetwork.org/global-landscape-stewards



PHOTO: MICHELLE O'HERRON