Socio-economic monitoring by Caribbean Challenge MPA Managers

Report No. 2

Report of the St. Lucia

SocMon Caribbean Training Workshop

Juliette's Lodge Hotel, St. Lucia

16-20 January 2012

Centre for Resource Management and Environmental Studies (CERMES)
University of the West Indies, Faculty of Pure and Applied Sciences
Cave Hill Campus, Barbados
2012

CONTENT

1 WORKSHOP WELCOME

Following the agenda (Appendix 1), Maria Pena welcomed participants (Appendix 2) to the second of three site-specific socio-economic monitoring (SocMon) workshops for the US-NFWF funded project on *Socio-economic monitoring by Caribbean Challenge MPA Managers (Caribbean Challenge SocMon)*. She indicated that it was an informal workshop session involving group work and three field trips. She highlighted that CERMES is partnering with the Saint Lucia National Trust (SLNT) and Department of Fisheries to conduct the workshop in St. Lucia. She further provided information on the work of CERMES and its practical experience in building capacity of fisheries departments, MPA authorities, a wide range of NGOs and private stakeholders through training and several projects in SocMon Caribbean, MPA management effectiveness and evaluation, and local area management. Reference was made to the 2005 regional UNEP SocMon training workshop held in St. Lucia and the demonstration exercises at Soufriere and Canaries. Ms. Pena mentioned that the objectives of the workshop were to build capacity in socio-economic monitoring for the site and to develop sustainable SocMon site monitoring plans for the Pointe Sable Environmental Protection Area (PSEPA), the Soufriere Marine Management Area (SMMA) and Pitons Management Area (PMA). Each MPA site would receive a sub-grant of USD 2,500 to initiate monitoring.

She introduced two CERMES colleagues, Ms. Katherine Blackman, CERMES Research Assistant and Assistant SocMon Trainer for the project and Dr. Patrick McConney, CERMES Senior Lecturer and Technical Advisor to the Caribbean Challenge SocMon project. Ms. Pena noted that Ms. Blackman has experience in SocMon and also conducted a MSc project using the SocMon Caribbean methodology in the Negril Marine Park, Jamaica. She told participants that Dr. McConney was first SocMon Coordinator for English-speaking Caribbean. She mentioned that in addition to the Caribbean Challenge SocMon project he was currently the Prinicipal Investigator and Project manager of the Marine Resource Governance in the Eastern Caribbean (MarGov) project and NOAA- funded MPA governance project. Ms. Pena invited Dr. McConney to give a brief description of the latter which is of particular relevance to MPAs in St. Lucia. Dr. McConney told participants that the aim of the project was to develop adaptive capacity for MPA governance. There is focus on governance and he stated that the human dimension was the main reason for failure of MPAs. The project is expected to end in October 2012.

Mr. Anthony Sammie, Programme Officer (South) gave brief opening welcoming remarks on behalf of Mr. Bishnu Tulsie, Director, Saint Lucia National Trust. Ms. Allena Joseph, Fisheries Biologist, St. Lucia Department of Fisheries welcomed the workshop facilitators and participants on behalf of Ms. Sarah George, Chief Fisheries Officer. In her opening she indicated the importance of marine protected areas (MPAs) as tools for conservation of biodiversity and contributors to the ecosystem management of fisheries. She noted that St. Lucia's two marine protected areas – PSEPA and SMMA – encompass marine and wildlife reserves and a number of different ecosystems, and collectively provide a number of socio-economic opportunities including fishing, charcoal production and dive tourism. As such

she stated that socio-economic information on marine protected areas is essential in identifying potential problems and solving or preventing negative impacts. She went on to note that training in socio-economic monitoring, specially adapted to the Caribbean region will provide fisheries/MPA management authorities with a tool to conduct sustainable monitoring of socio-economic conditions at the project MPA sites. Ms. Joseph expressed her hope for the promotion of the use of social and economic data in management decision-making among Caribbean Challenge countries. Finally, she thanked CERMES for facilitating the workshop and the Saint Lucia National Trust for their role in hosting the workshop. She wished participants a productive five days.

At this point, each participant gave brief introductions about themselves and associated agencies.

2   INTRODUCTION TO PROJECT

Maria Pena gave participants an overview of the Caribbean Challenge SocMon project providing a background on funding, duration, project management and the overall goal of the project and its objectives (Appendix 3). She noted that the first objective of the project was being realised with the initiation of the St. Lucia training workshop and would continue with the implementation of the final training workshop in Grenada in early February. Participants were reminded of the workshop goal and objectives. This was followed by an overview of the project's study sites.

3   TRAINING

Maria Pena introduced participants to the SocMon Caribbean methodology for collecting and analysing basic socio-economic data useful for coastal management (Appendix 4). During this session, participants were encouraged to refer to the SocMon Caribbean guidelines and accompanying Socio-economic Manual for Coral Reef Management. It was emphasised that these references were important resource materials for SocMon Caribbean. Examples of SocMon projects in the wider Caribbean region were given to illustrate the wide applicability of SocMon, ranging from fisheries management planning and fisheries profiling to efforts at strengthening MPA management.

Each of the four phases of the SocMon Caribbean methodology (preparatory activities; planning and reconnaissance; field data collection and data analysis) was described using lessons from previous studies to explain components of each phase. Emphasis was placed on the use of a variety of non-survey methods useful for collecting and presenting data. Participants were encouraged to use these techniques in their monitoring. A case study was presented to illustrate the application of SocMon Caribbean in Canaries, St. Lucia.

A description of the workshop demonstration study site, the PSEPA; importance of the area for conservation; activities and uses within the area; issues and concerns relevant to the site; projects and studies undertaken or being conducted within the area; and the linkage of SocMon to interests or activities in the site were discussed with participants (Appendix 5). Key points about the PSEPA added by participants included:

- Tourism and charcoal production aren't the only livelihood opportunities in the area
- There is a hiking trail at Moule-a-Chique
- Illegal and unsustainable harvesting of mangroves

- Numerous studies have been conducted on the area since the 1980s
- Bio-physical monitoring (Reef Check) occurs regularly around the Maria Islands
- PSEPA is the only environmental protection area in St. Lucia. Designated in 1986.

On the first day of the workshop participants initiated preparatory activities for the practical workshop socio-economic assessment of the demonstration site. This included developing the goal and objectives for the assessment exercise, assigning boundaries to the study area and noting available secondary data. In this session, participants worked in two groups. During the afternoon, participants went on a field trip to the PSEPA for preliminary reconnaissance. The field trip was lead by Mr. Sammie.

On the second day, participants were guided in refining the goal and objectives for the study area and were assisted in completing the team work plans and task responsibilities. Participants were introduced to methods for data collection including secondary sources, observation, key informant interviews and household/individual surveys. During this session, the two groups formulated semi-structured interview guides for key informant interviews (Appendix 6) conducted during the second field trip. Each group conducted three key informant interviews.

On Day 3 of the training workshop, an overview of questionnaire design and data analysis of questionnaires was provided. This included an introduction to data coding and the use of Excel and SPSS for data analysis presented by Ms. Katherine Blackman. Since data analysis in SocMon is meant to be simple, instruction focused on the use of pivot tables for generating frequency distributions. The range of visualisation techniques recommended by the SocMon Caribbean methodology (see pages 113 to 144 in the GCRMN manual) were again emphasised as useful options for displaying data collected. The groups then designed individual/household interview surveys (Appenidx 7) comprising approximately ten questions to administer to between 5-10 persons during the final field trip for the workshop. Questions designed were to be relevant to the goals and objectives and socio-economic variables chosen for assessment and were to utilise different layouts, i.e. open-ended, dichotomous, close-ended, tick one that applies, tick all that apply, likert scale questions etc. Before finalising the surveys, each group pre-tested their survey on the other group to identify leading, ambiguous or otherwise difficult-to-understand questions.

On Day 4 participants were introduced to validating SocMon results, communication products and pathways for conveying such results to various audiences as well as how to use SocMon outputs. The majority of the day was spent analysing the data from the individual surveys and key informant interviews. Each group was expected to produce a PowerPoint presentation of their SocMon assessment (Appendix 8). Participants completed the preparatory activities worksheets (Appendix 9).

On the final day of the training workshop, each team presented their assessment findings. In the remaining time, participants began to discuss proposals for site monitoring at their respective sites. Participants were given two weeks to complete these proposals for submission to be reviewed by CERMES.

Throughout the duration of the workshop the facilitators video recorded aspects of the training and fieldwork and group exercises. These video clips were used to produce a short

video of the SocMon training and was shown to participants on the final day of the workshop.

4   WORKSHOP EVALUATION

At the end of the workshop, all participants completed a workshop evaluation form in order to provide feedback to the facilitators. See Figures 1-7 for the results.

Generally the workshop was successful with 100% of participants either strongly agreeing or agreeing that:

- The workshop goal had been achieved (Figure 1).
- The first objective of the workshop, introduction to SocMon Caribbean methods, had been achieved (Figure 2).
- The workshop was well organised and facilitated (Figures 3 and 4).
- They would recommend a similar workshop to colleagues (Figure 5).
- Their abilities as MPA professionals or stakeholders had been improved as a result of the workshop (Figure 6).
- They enjoyed participating in the workshop (Figure 7).
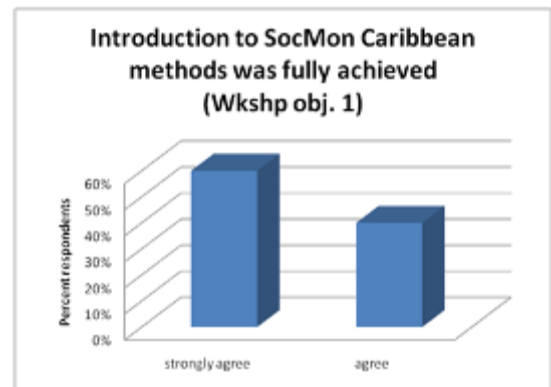

Figure 1: Workshop goal was fully achieved

Figure 2: The first objective of the workshop was fully achieved

Figure 3: Workshop organisation

Figure 4: Workshop facilitation

Figure 5: Workshop recommendation

Figure 6: Improvement in professional or stakeholder abilities as a result of the workshop

Figure7: Personal enjoyment of workshop

Greater than half (63%) of the workshop participants believed that the second workshop objective, development of a feasible SocMon site monitoring plan and timeline for the study sites for implementation, was fully achieved. Thirty-eight percent of trainees neither agreed nor disagreed with the evaluation statement. This uncertainty is valid since the development of a thorough and finalised monitoring plan is not achievable in the half-day session provided in workshop. Instead preparations for drafting the plan and in-workshop discussions among participants about proposals for SocMon assessments/monitoring programmes are facilitated.

The majority of the participants (80%) identified things they liked the most about the workshop with sixty percent of responses pertaining to the practical component of the workshop:
- The analysis of the data and preparation of the questionnaire.
- Practical approach to learn by doing; learnt a little bit more about SocMon data analysis.
- The practical aspect.

- The practical sessions and group work activities gave the opportunity to share ideas.
- Practical exercise.
- Well organised; fully participatory; easily understood at level.
- Participants were well catered for.

Sixty percent of workshop participants identified things they liked least about the workshop, half of which pertained to what participants felt was short fieldwork experience:
- The field visits were too brief.
- The [field trips] length of time(though lengthy otherwise), it limited interaction with interviewees, site, etc.
- Time was a bit too limited.
- Poor attendance by persons who were invited.
- The location of the workshop (commuting).
- Nothing.

Four participants were unable to identify the things they least liked about the workshop.

Forty percent of participants recommended the following changes to the workshop:
- More and longer hours in the field.
- Greater participation.
- [Workshop] should be a bit longer.
- Bring more countries to learn from each other.

One participant noted that nothing should be changed and the remaining 50% of participants were unable to provide recommendations for changes.

Seventy percent of the SocMon trainees provided additional thoughts, comments or suggestions about the workshop, the majority of which called for follow-up training and the opportunity to present project results to a wider audience:
- There should be follow-up to this workshop at some point in the near future. Also links and networking should be created to share information and update on new course areas and material.
- This training should be done at least every two years for continued capacity building in SocMon throughout the region.
- Follow-up regional workshop to present on all MPAs. Require all MPAs to have a standard set of questions (base) that would allow comparison.
- I think that this is a very useful and beneficial exercise and I would recommend it to my colleagues.
- The workshop met its objectives; it was well presented and was engaging. It would be nice for there to be follow-up.
- Well done.
- Great job, thank you!

APPENDICES

Appendix 1: Agenda

Caribbean Challenge SocMon Training Workshop
16-20 January 2012
Juliette's Lodge, Vieux Fort,
St. Lucia

PROGRAMME

Day and time	Activity
Sunday [15 January]	
Morning	Trainers arrive
Afternoon	Pre-workshop site reconnaissance (trainers)
	Meet with local organiser to finalise workshop preparations
Monday [16 January]	
8:30 – 9:00	Arrivals and check-in (for local participants outside of Vieux Fort) Registration and document distribution
9:00 – 9:20	Opening remarks
9:20 – 9:30	Welcome and introduction of trainers and participants
9:30 – 9:40	Introduction to Caribbean Challenge SocMon Project
9:40 – 9:50	Overview of workshop goals and objectives
9:50 -10:00	Discussion of workshop schedule
10:00 – 10:30	*BREAK*
10:30 -10:40	What is SocMon? Why do this? Where has SocMon been applied in the Caribbean and globally? Overview of the SocMon process
10:40 – 11:00	SocMon case study presentations
11:00 – 12:00	**SocMon Preparatory Activities & Planning and Reconnaissance for socio-economic assessment & monitoring**
12:00 – 1:00	*LUNCH*
1:00 – 3:00	Group discussion: 1. Introduction to demonstration study site [Pointe Sable Environmental Protection Area (PSEPA)] with situation analysis; issues of concern; and review of available secondary data 2. Preparatory activities for PSEPA field scoping in two teams
3:00 – 5:00	1st field trip to PSEPA for field scoping and de-brief on site. *Homework: Prepare 5-10 slides of interesting field scoping photos (per team)*
Tuesday [17 January]	
8:30 – 9:00	Slide show and discussion of PSEPA demonstration study site by teams
9:00 – 10:00	Group work: Review and refine study site goals and objectives; boundaries for monitoring; and secondary data
10:00 – 10:30	*BREAK*
10:30 – 11:00	Develop team work plans and assign responsibility for tasks
11:00 – 12:00	**Field Data Collection** Data collection methods: secondary sources, key informant interviews, surveys and observation

1

St. Lucia SocMon Caribbean training workshop

Day and time	Activity
12:00 – 1:00	*LUNCH*
1:00 – 3:00	**Field Data Collection cont.** Group work: Review available secondary sources of data Formulate semi-structured interview guides for key informants
3:00 – 5:00	2nd field trip to study site for each team to implement work plan: key informant interviews, observation data, photos, transects etc. Team meetings on return to analyse data **Homework: Gap analysis**
Wednesday [18 January]	
8:30 – 9:00	Review results and experiences of 2nd field trip in plenary
9:00 – 10:00	**Field Data Collection** Survey design re-cap: types of questions **Data Analysis** Developing coding sheet and data table, use of pivot tables Visualisation techniques
10:00 – 10:30	*BREAK*
10:30 – 12:00	Group work: Teams develop household interview survey, coding sheet and data table
12:00 – 1:00	*LUNCH*
1:00 – 2:00	Group work: Teams develop household interview survey, coding sheet and data table Pre-test survey in teams
2:00 – 2:30	Print surveys
2:30 – 5:00	3rd field trip to study site for each team to implement work plan Administer household survey, fill in any gaps from previous site visit Team meetings on return to analyse data **Homework: Data entry!**
Thursday [19 January]	
8:30 – 9:00	Review results and experiences of 3rd field trip in plenary
9:30 – 10:00	**Post Data Analysis: Validation, Communicating Results and Using SocMon Outputs** Group work: Complete data entry Conduct data analysis Discuss interpretation, conclusions, key lessons learned and adaptive management
10:00 – 10:30	*BREAK*
10:30 – 12:00	Data analysis and interpretation cont. Prepare team presentations
12:00 – 1:00	*LUNCH*
1:00 – 3:00	Prepare team presentations
3:00 – 4:00	Teams present SocMon findings (key informants and study site representatives invited to participate, validate)
4:00 – 5:00	General discussion, key lessons learned by participants about SocMon **Homework: Begin thinking about follow-up studies at PSEPA, PMA and**

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Day and time	Activity
	SMMA
Friday [20 January]	
8:30 – 10:00	Group discussion of ideas for MPA SocMon site assessment and monitoring programmes
10:00 – 10:30	*BREAK*
10:30 – 12:00	Participants prepare monitoring plans for their MPA SocMon follow-up studies
12:00 – 1:00	*LUNCH*
1:00 – 1:30	Presentations of monitoring objectives/plans for MPA follow-up studies Peer review of proposals
1:30 – 2:00	Final discussions, evaluation of workshop and wrap-up
All afternoon	Departures

Appendix 2: Participants

Name	Title	Agency	Email
Nadia Cazaubon	Project Officer	Soufriere Marine Management Area	cazaubon@smma.org.lc
Kaygiana Charlery		Goodwill Fishermen's Co-operative	kaygi362@hotmail.com
Bethia Daniel	SDES Officer	Sustainable Development and Environment Section	bdaniel@sde.gov.lc
Faustinus Faisal	Community Development Officer (South)		faisalfac@yahoo.com
Allena Joseph	Fisheries Biologist	Department of Fisheries	allenajoseph@hotmail.com
Henix Joseph	General Manager	PMA	pmawhs@candw.lc henixj@gmail.com
Shephard Joseph	Fisheries Officer	Department of Fisheries	legaljoe6@hotmail.com
Clinton Labadie	Manager	Southern Tourism Development Corporation	stdc_slu@hotmail.com
Malcolm Mathurin	Projects Officer	Soufriere Regional Development Foundation	mathurin.malcolm@gmail.com
Petronila Polius	Fisheries Officer	Department of Fisheries	ppolius@hotmail.com
Anthony Sammie	Programme Officer	Saint Lucia National Trust	mariaisland@candw.lc
Shirlene Simmons	Conservation Manager	Saint Lucia National Trust	conservationmgr@slunatrust.org
CERMES staff			
Patrick McConney	Senior Lecturer	CERMES, UWI	patrick.mcconney@cavehill.uwi.edu
Maria Pena	Project Assistant	CERMES, UWI	maria.pena@cavehill.uwi.edu
Katherine Blackman	Research Assistant	CERMES, UWI	katherine.blackman@cavehill.uwi.edu

Appendix 3: Caribbean Challenge SocMon project overview

SLU CC SocMon who's who –
Local network

- SLNT – Anthony Sammie, Shirlene Simmons & Cyril Saltibus
- Department of Fisheries – Allena Joseph, Shepard Joseph, Petronilla Polius
- SMMA – Newton Eristhee, Nadia Cazaubon
- PMA – Henix Joseph
- SDES – Berthia Daniel
- STDC – Clinton Labadie
- Community development officer (South) – Faustinus Faisal
- NCA
- SRDF
- Fisherman's Cooperative
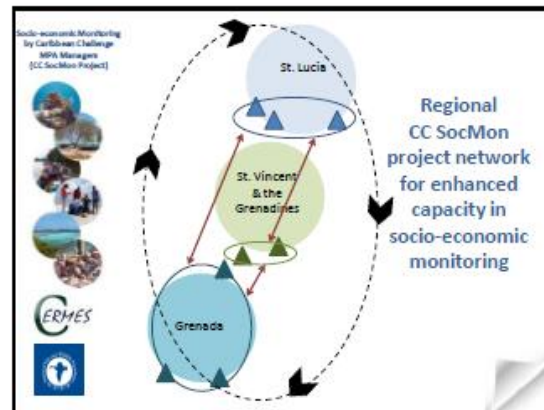
Regional
CC SocMon
project network
for enhanced
capacity in
socio-economic
monitoring

Workshop goal and objectives

Goal:

For MPA managers and field staff to learn how to develop and implement socio-economic monitoring programs for strategically selected sites using SocMon Caribbean methods

Objectives:

1. To introduce socio-economic monitoring using SocMon Caribbean methods

2. To develop a feasible SocMon site monitoring plan and timeline for each study site for implementation

SVG workshop outcomes

- Video of training
- TCMP site monitoring plans developed
  - Goal for monitoring: *Development of a core set of socio-economic indicators to assist with decision-making and the effective adaptive management of the TCMP*
- SCMCA site monitoring plan under review
  - Proposed goal for monitoring: *Collection of socio-economic data to inform management planning*

Socio-economic Monitoring for Coastal Management in the Caribbean (SocMon)

Maria Pena and Katherine Blackman
CERMES, UWI, Cave Hill Campus
Caribbean Challenge SocMon training workshop
Juliette's Lodge Hotel, St. Lucia
16-20 January 2012

Purpose of this workshop

1. To introduce socio-economic monitoring using SocMon Caribbean methods
2. To develop a feasible SocMon site monitoring plan and timeline for each study site for implementation

What is SocMon?

- Guidelines on how to do socio-economic monitoring useful for fisheries and coastal management at the site level
- SocMon is used with the "Socio-economic Manual for Coral Reef Management" that contains field methods
- CERMES: Regional SocMon centre for English-speaking C'bbean
- Globally six regions are successfully conducting SocMon:

Caribbean
Central America
Pacific Islands
South Asia
South East Asia
Western Indian Ocean

Region-specific, standardised guidelines for socio-economic monitoring

SocMon Caribbean guidelines: TOC

1. What is this all about?
2. Why should I do this?
3. What's involved?
4. What data do I collect?
5. What do I do with these data?
Appendix A: The variables
Appendix B: Key informant interviews/ secondary sources guide
Appendix C: Survey guide
Appendix D: Key informant interviews/ secondary sources analysis sheet
Appendix E: Survey analysis sheet

SocMon manual: TOC

Introduction
Chapter 1: Preparatory activities
Chapter 2: Reconnaissance and planning
Chapter 3: Field data collection
Chapter 4: Final data analysis
Appendix A: Socio-economic parameters
Appendix B: Sampling approaches
Glossary
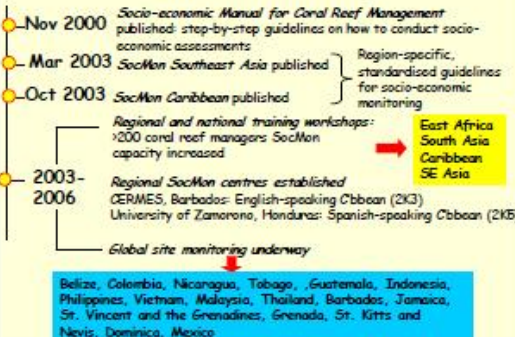Suggested readings
References
Worksheets

SocMon history

- Nov 2000 *Socio-economic Manual for Coral Reef Management* published: step-by-step guidelines on how to conduct socio-economic assessments
- Mar 2003 *SocMon Southeast Asia* published
- Oct 2003 *SocMon Caribbean* published

Region-specific, standardised guidelines for socio-economic monitoring

Regional and national training workshops:
>200 coral reef managers SocMon capacity increased

East Africa
South Asia
Caribbean
SE Asia

- 2003-2006 *Regional SocMon centres established*
CERMES, Barbados: English-speaking C'bbean (2K3)
University of Zamorano, Honduras: Spanish-speaking C'bbean (2K5)

Global site monitoring underway

Belize, Colombia, Nicaragua, Tobago, ,Guatemala, Indonesia, Philippines, Vietnam, Malaysia, Thailand, Barbados, Jamaica, St. Vincent and the Grenadines, Grenada, St. Kitts and Nevis, Dominica, Mexico

Why do this? (The Benefits)

- SocMon can help us to understand the socio-economic contexts of coastal resource use by various stakeholders
- This is essential for assessing, predicting and managing coastal resource use over time
- National and regional fisheries, MPA and other management plans call for socio-economic data

Who is SocMon for?

- Coastal managers (Govt. and NGOs)
- Resource user groups
- Community organisations
- Donors / technical assistance
- Academic and research institutions
- Environmental news media / public

SocMon in the Caribbean

Finding SocMon data: www.socmon.org

The SocMon database provides data and information on ~ 80 coastal monitoring sites
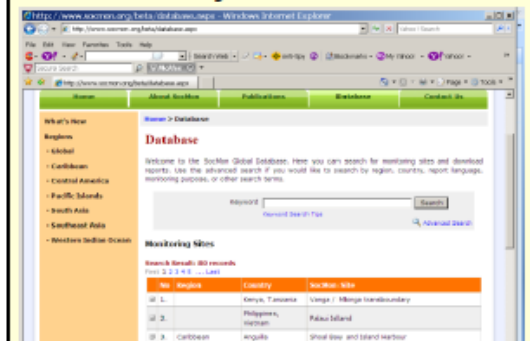
Where are the studies?

- Barbados
  - Graeme Hall Swamp
  - Oistins
- Belize
  - Glovers Reef Marine Reserve
  - Laughing Bird Caye National Park
  - Gladden Spit and Silk Cayes Marine Reserve
- Grenadines Islands
  - Several locations across two countries
- Nicaragua
  - Corn Island lobster fishery
- Trinidad and Tobago
  - Speyside proposed MPA in Tobago
- Nevis
  - The Narrows
- Grenada
  - East coast (La Poterie to La Tante
- Grenadines Islands
  - Several locations across two countries
- St. Vincent
  - Rose Place
- Dominica
  - West coast fishing villages (Colihaut, Bioche, Dublanc)
- Jamaica
  - Negril Marine Park

SocMon project objectives in Caribbean

- Baseline data gathering on coastal communities
- Marine park/protected area management
- Fisheries management planning
- Socio-economic profiles of fisheries
- Enhancing management capacity of stakeholders
- Promoting use of socio-economic data in fisheries management

Typical SocMon project cycle

- Project announcement
  - project description, purpose, duration, expected outputs
- Site selection
  - via application or prior interest or research need
- Multi-stakeholder inception workshop
  - Informs stakeholders about project, project workplan developed/confirmed, buy-in to project

Typical SocMon project cycle

- SocMon training*
- Initiation of site monitoring
  - Data collection
- Validation
  - Provide feedback to stakeholders
- Project reporting
  - Progress reports to funder
  - Site monitoring report
- Data sharing
  - Reef Base

SocMon training

- 3 to 5-day workshop
- Approx. 20 participants
  - Wide stakeholder participation
- Introduction to SocMon Caribbean
  - Guidelines for monitoring
  - Survey and non-survey methods for data collection
  - Field trip to study area/monitoring site (field scoping)
- Planning for monitoring
  - Preparatory activities worksheets
- Monitoring methods
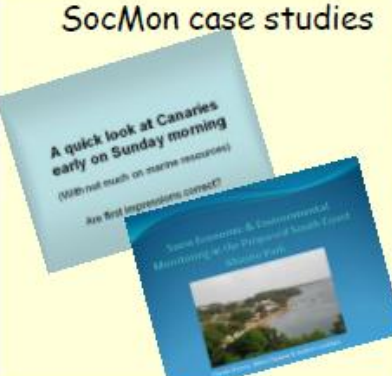
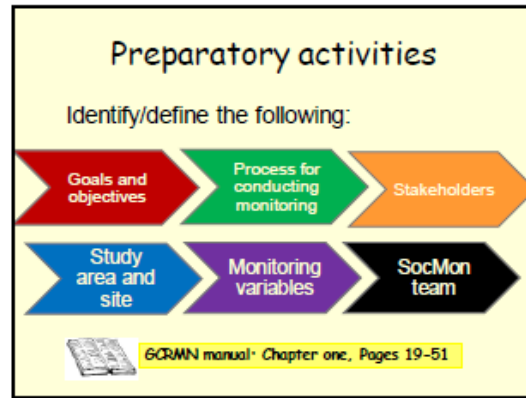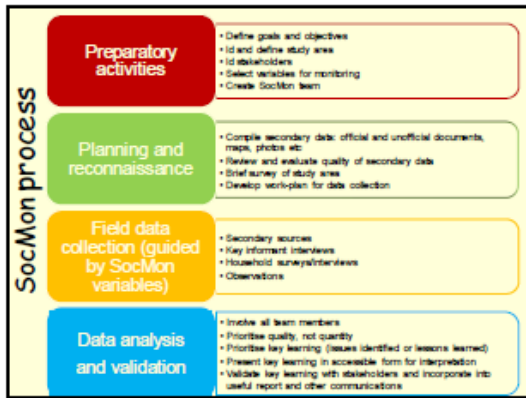*Longer workshops allow for sample data collection and analysis

SocMon process

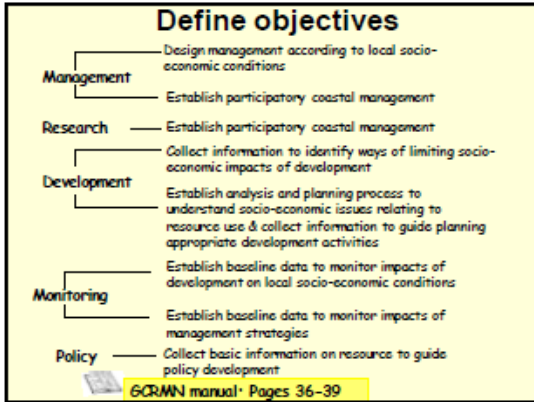| Preparatory activities	• Define goals and objectives • Id and define study area • Id stakeholders • Select variables for monitoring • Create SocMon team
Planning and reconnaissance	• Compile secondary data: official and unofficial documents, maps, photos etc • Review and evaluate quality of secondary data • Brief survey of study area • Develop work-plan for data collection
Field data collection (guided by SocMon variables)	• Secondary sources • Key informant interviews • Household surveys/interviews • Observations
Data analysis and validation	• Involve all team members • Prioritise quality, not quantity • Prioritise key learning (issues identified or lessons learned) • Present key learning in accessible form for interpretation • Validate key learning with stakeholders and incorporate into useful report and other communications

SocMon case studies

A quick look at Canaries early on Sunday morning
(With not much on marine resources)
Are first impressions correct?

SocMon process

Preparatory activities	• Define goals and objectives • Id and define study area • Id stakeholders • Select variables for monitoring • Create SocMon team
Planning and reconnaissance	• Compile secondary data: official and unofficial documents, maps, photos etc. • Review and evaluate quality of secondary data • Brief survey of study area • Develop work-plan for data collection
Field data collection (guided by SocMon variables)	• Secondary sources • Key informant interviews • Household surveys/interviews • Observations
Data analysis and validation	• Involve all team members • Prioritise quality, not quantity • Prioritise key learning (issues identified or lessons learned) • Present key learning in accessible form for interpretation • Validate key learning with stakeholders and incorporate into useful report and other communications

Preparatory activities

Identify/define the following:

Goals and objectives → Process for conducting monitoring → Stakeholders

Study area and site → Monitoring variables → SocMon team

GCRMN manual· Chapter one, Pages 19-51

Goal (Purpose of SocMon)	Objectives (Issues of interest)
To collect socio-economic data to inform marine conservation and development decision-making	Determine trends in socio-economic benefits from resource use
	Determine how coastal and marine ecosystems provide benefits
	Enhance awareness of ecosystem services provided
	Involve resource users in monitoring

Plans with socio-economic aspects provide rationale for using SocMon

- MPA management plans
- Fisheries management plans
- Coastal zone management plans
- Tourism development plans
- Physical development plans
- Poverty alleviation plans

Identify the study area
Stakeholders ⇔ Study area(s)

- Stakeholder analysis
  - Primary
  - Secondary
  - Interests
  - Organisations
- MPA and watershed management plans
- Core coastal area
- Watershed area
- Satellite study areas

GCRMN manual· Pages 21-27

Consult with stakeholders

- Explain purpose, process and outcomes so that stakeholders can participate if they wish

- Ensure the concerns and priorities of as many stakeholders as is feasible are included in the planning of SocMon

- Ensure the cooperation of stakeholders, and particularly their organizations, in SocMon

GCRMN manual· Pages 29-36

Define objectives

Management
- Design management according to local socio-economic conditions
- Establish participatory coastal management

Research — Establish participatory coastal management

Development
- Collect information to identify ways of limiting socio-economic impacts of development
- Establish analysis and planning process to understand socio-economic issues relating to resource use & collect information to guide planning appropriate development activities

Monitoring
- Establish baseline data to monitor impacts of development on local socio-economic conditions
- Establish baseline data to monitor impacts of management strategies

Policy — Collect basic information on resource to guide policy development

GCRMN manual· Pages 36-39

Identify SocMon variables

- 60 socio-economic variables
  - Community-level demographics
  - Coastal and marine activities
  - Governance
  - Attitudes and perceptions
  - Material style of life
- Prioritise SocMon variables
  - Goals of socio-economic assessment/monitoring
  - Importance of data collection
  - Site-specific conditions

SocMon Caribbean guidelines· Pages 17-24

The SocMon team

- ✓ Coastal manager
- ✓ Social scientist
- ✓ Local advisors
- ✓ Field researchers
- Interdisciplinary
- About 5-7 people
- Meets regularly

SocMon process

Preparatory activities
- Define goals and objectives
- Id and define study area
- Id stakeholders
- Select variables for monitoring
- Create SocMon team

Planning and reconnaissance
- Compile secondary data: official and unofficial documents, maps, photos etc.
- Review and evaluate quality of secondary data
- Brief survey of study area
- Develop work-plan for data collection

Field data collection (guided by SocMon variables)
- Secondary sources
- Key informant interviews
- Household surveys/interviews
- Observations

Data analysis and validation
- Involve all team members
- Prioritise quality, not quantity
- Prioritise key learning (issues identified or lessons learned)
- Present key learning in accessible form for interpretation
- Validate key learning with stakeholders and incorporate into useful report and other communications

Secondary data

- Compile relevant data
  - official and unofficial documents (including newspapers)
  - statistical reports (e.g. census reports)
  - research reports
  - maps
  - aerial photos & satellite images
  - previous/ongoing project reports
  - historical documents and accounts
  - websites
- Review the data
- Evaluate the quality of the data
- * More in Data Collection

GCRMN manual· Pages 53-57

Reconnaissance survey

- Brief survey of study area
  - Finalise study site selection for data collection
  - Preliminary information on the # and location of stakeholders
  - ID logistics and arrange field data collection
  - Refine SocMon study objectives & variables (if necessary), study area and sites

GCRMN manual· Pages 57-61

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Slide 1: Planning field data collection: Work-plan

The work-plan defines the:

- SocMon activities;
- methods & visualisation techniques to be used;
- resources required;
- timing and target dates;
- team responsibilities;
- data processing, reporting

GCRMN manual: Pages 62-82

Slide 2: SocMon process

Preparatory activities	• Define goals and objectives • Id and define study area • Id stakeholders • Select variables for monitoring • Create SocMon team
Planning and reconnaissance	• Compile secondary data: official and unofficial documents, maps, photos etc • Review and evaluate quality of secondary data • Brief survey of study area • Develop work-plan for data collection
Field data collection (guided by SocMon variables)	• Secondary sources • Key informant interviews • Household surveys/interviews • Observations
Data analysis and validation	• Involve all team members • Prioritise quality, not quantity • Prioritise key learning (issues identified or lessons learned) • Present key learning in accessible form for interpretation • Validate key learning with stakeholders and incorporate into useful report and other communications

Slide 3: What Data Do I Collect ?

So many socioeconomic variables to choose from!

*See SocMon Caribbean Guidelines

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Slide 4: Sources of data

- Secondary sources
  - Existing documents, maps, data, etc.
  - Compiling a bibliography, keep it updated
- Key informants
  - People knowledgeable on particular topics
  - Use to fill in gaps, profile places, activities
- Household interviews
  - Survey questions for specific standard info
  - Interview households in selected settlements
- Observations
  - Notes and records, often now done by photos
  - Develop a digital image library, link to GIS

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Slide 5: Secondary data and data from key informants is used to:

- refine the lists of objectives, stakeholder groups, study sites and parameters [planning]
- identify gaps in existing knowledge in preparation for field data collection [questions]
- ensure the field data collection does not collect information that has already been collected [efficiency]
- provide a basis for cross-checking information collected during the field data collection [validation]

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Slide 6: Socio-economic variables

*See Appendix A in SocMon Caribbean Guidelines

- Variables set out according to:
- What it is
- How to collect the data
- How to analyse the data
- How the information can be useful to managers

SocMon Caribbean guidelines: Appendix A 45-52

What Data Do I Collect?
Community Level Demographics

K1. Study area	K7. Education
K2. Population	K8. Literacy
K3. Number of households	K9. Ethnicity
	K10. Religion
	K11. Language
K4. Migration rate	K12. Occupation
K5. Age	K 13. Community infrastructure and business development
K6. Gender	

SocMon Caribbean guidelines·
Pages 18, 20 & Appendix A 29-35

What Data Do I Collect?
Coastal and Marine Activities

K14. Activities	K19. Use patterns
K15. Goods and services	K20. Levels and types of impact
K16. Types of use	K21. Level of use by outsiders
K17. Value of goods and services	K 22. Household use
K18. Goods and services market orientation	K23. Stakeholders
	K24. Tourist profile

SocMon Caribbean guidelines·
Pages 18, 21 & Appendix A 36-45

What Data Do I Collect?
Governance

K25. Management body
K26. Management plan
K27. Enabling legislation
K28. Management resources
K29. Formal tenure and rules
K30. Informal tenure and rules, customs and traditions
K31. Stakeholder participation
K32. Community and stakeholder groups

SocMon Caribbean guidelines·
Pages 18, 21 & Appendix A 45-52

What (Survey) Data Do I Collect ?
Household demographics

S1. Age	S9. Household income
S2. Gender	S10. Household activities
S3. Ethnicity	S11. Household goods and services
S4. Education	
S5. Religion	S12. Types of household uses
S6. Language	S13. Household market orientation
S7. Occupation	
S8. Household size	S14. Household uses

SocMon Caribbean guidelines·
Pages 19, 22 & Appendix A 53-59

What (Survey) Data Do I Collect ?
Attitudes and Perceptions

S15. Non-market and non-use values
S16. Perceptions of resource conditions
S17. Perceived threats
S18. Awareness of rules and regulations
S19. Compliance
S20. Enforcement
S21. Participation in decision-making
S22. Membership in stakeholder groups

SocMon Caribbean guidelines·
Pages 19, 23 & Appendix A 59-68

What (Survey) Data Do I Collect ?
Attitudes and Perceptions

S23. Perceived coastal management problems
S24. Perceived coastal management solutions
S25. Perceived community problems
S26. Successes in coastal management
S27. Challenges in coastal management
S28. Material style of life

SocMon Caribbean guidelines·
Pages 19, 23 & Appendix A 59-68

How do I collect the data?

- Observation
- Semi-structured interviews
- Group interviews
- Oral histories
- Surveys
- *Visualisation techniques
  - maps
  - transects
  - timelines
  - seasonal calendars
  - historical transects
  - decision trees
  - venn diagrams
  - flow charts
  - ranking
  - field analysis

GCRMN manual - Chapter 3, Pages 92-148

Mapping, photos, (maybe GIS)

Resource features

Resource uses

Infrastructure

Areas of conflict

Demographics

Reference sites

Boundaries, zones

Etc., etc., etc.
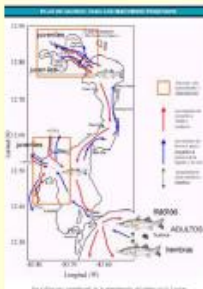
Combine local knowledge with science information

- Climatic conditions
- Life histories, cycles
- Species harvested
- Fishing vessels used
- Fishing methods used
- Processing of catch
- Trade and income
- Fish consumption
- Alternative livelihoods
- Culture and religion

SocMon results /analysis tables

SocMon Caribbean guidelines - Page 54

SocMon results /analysis tables

Major occupations in community	Percent of working population conducting this occupation as primary occupation	Number of people conducting this occupation as primary occupation	Percent of working population conducting this occupation as secondary occupation	Percent of working population conducting this occupation as tertiary occupation
1. Fishers	20%	200	20%	10%
2. Watersports operators	30%	300	0%	0%
3. Aquaculture workers	20%	200	5%	15%
4. Hotel workers	5%	50	0%	0%
5. Farmers	5%	50	30%	45%

SocMon Caribbean guidelines· Page 34

SocMon results /analysis tables

Coastal and Marine Activities	Coastal and Marine Goods and Services	Types of Use (primary)	Coastal and Marine Activities	Coastal and Marine Goods and Services	Value of Goods and Services
Fisheries	Lobster	Trap	Fisheries	Lobster	High
	Grouper	Handline		Grouper	High
Tourism	Hotel	Guest houses (1-7 rooms)	Tourism	Hotel	Medium
	Diving	SCUBA		Diving	Low
Aqua-culture	Oyster	Line	Aqua-culture	Oyster	Medium

SocMon Caribbean guidelines· Pages 37 & 38

Distribution of boat type by island

Source: Gill 2007, Socio-economic profile of fisheries in the Grenadines

Chart organisational and institutional relationships
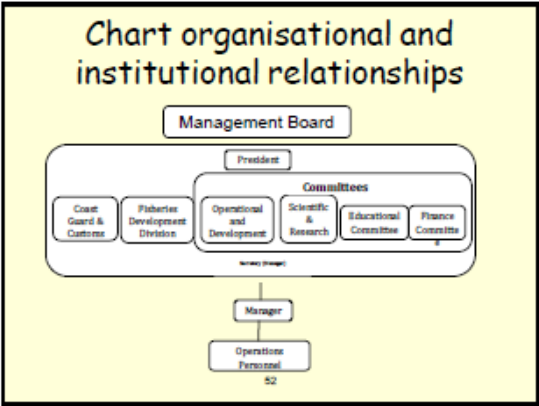
Local knowledge and classification

Description/ English name	Species	Relative abundance	Changes in conditions	Habitat	Name in local language
Clam (very large, almost smooth)	unknown		+	mud / mangrove	kai
Big spider shell	Lambis lambis		0	reef	spider
Clam (large, white, vertical ridges)	unknown		0	reef	kai
Clam (large, brown, cross ridges)	Anadara spp		+	mud	kai nalepa
Pearl oyster	Pinctada margaritifer		0	sand / mud	vilavila tiki
Limpet	Colisella strata		+	coral islands	kai nai
Sunset shell	Asaphis violacens?		+	beach / mud	kai ai
Small top shell	Trochus maculatus		0	reef edge	pere
Clam (tiny, grey, smooth)	unknown		0	sand beach, near rocks	siba
Cone shell	unknown		0	reef	baskatica
Pen shell	Pinca bicolour		0	sand / mud	mangali
Clam	unknown		0	sand	vilavila

GCRMN manual· Chapter 3, Page 143

Timelines of key events

Year	Event
1750	Mombuka settled, primarily by fishermen
1900	Plantation farms settled nearby
1950	Mombuka recognized for coral reef resources by NFA
	Severe droughts
1970 1975	Most plantation farmers moved away or became fishermen
1980 1982	Kela fisherman (townies) began to fish Mombuka reefs / Mombuka Fisheries Division established
1998	Mombuka Marine Park established / Blast fishing banned from Park

GCRMN manual· Chapter 3, Page 123

Historical mapping of changes — GCRMN manual· Chapter 3, Page 117

Historical transect matrix — GCRMN manual· Chapter 3, Page 130

Ranking e.g. of impact factors — GCRMN manual· Chapter 3, Page 142

Seasonal calendar — GCRMN manual· Chapter 3, Page 127

Daily and seasonal time use patterns — GCRMN manual· Chapter 3, Page 128

Venn diagram of resource uses and resource users — GCRMN manual· Chapter 3, Page 135

Flow charts of various types

Tourism Continues to expand in Mombuka

More Tourists visit Mombuka

Increased Profits → Expansion of Watersports Operation

Coral Reef degradation → Decrease in profits due to coral reef exploitation and devastation

SHORT-TERM IMPACTS   LONG-TERM IMPACTS

GCRMN manual· Chapter 3, Page 137

Demersals

1-10%
10-20%
20-40%
40-60%
60-100%
Unknown

Local fishers

Shore (locals & vendors)   Trading vessels

Export market

Hotels

Restaurants

Tourists/ Yachters

Source: Gill 2005. Soio-economic profile of fisheries in the Grenadines

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Decision diagramming

GCRMN manual· Chapter 3, Page 132

How to Analyze: Secondary Data, Key Informant info, Household Interviews, Observations

Basic principles for analysis:
- involve all team members
- prioritize quality, not quantity
- prioritize key learning, rather than just getting information

- **Key learning** refers to issues identified or lessons learned that are essential to the objectives of the monitoring, or are needed to understand the socioeconomic context of the stakeholders

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How to Analyze: Secondary Data, Key Informant info, Household Interviews, Observations

Final data analysis involves:
1) refining the key learning
2) using data to illustrate key learning
3) presenting the key learning in an accessible form for interpretation
4) validating the key learning with stakeholders
5) incorporating the key learning into a useful report and other communications

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Validation workshop

- Verification of data analysis
- Feedback to participants
- Encourage decision-making
- Foster trust and respect
- Accountability, transparency
- Pave way for follow-up
- Community empowerment

Communication choices

- written material *(report, GCFI paper)*
- visual material *(posters, pictures)*
- oral presentations *(area meetings)*
- one-on-one discussion *(animators)*
- mass media *(newspaper, radio, TV)*
- internet group discussion *(CAMPAM)*
- electronic bulletin boards *(NCRPS?)*

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Using SocMon outputs

- MPA management decision-making
- Stakeholder strategies (fishers, hotels)
- Designing sustainable monitoring
- Prioritising future research
- Preparing project proposals
- Area development planning
- Social improvement plans
- External agency guidance

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Thank You

CERMES

Centre for Resource Management
and Environmental Studies
The University of the West Indies
Cave Hill Campus
Barbados

SocMon demonstration study site: Pointe Sable Environmental Protection Area

POINTE SABLE MANAGEMENT AREA

(Espeut 2006)

SocMon Training Workshop
16–20 January 2012
Juliette's Lodge Hotel, St. Lucia

About the PSEPA

- Environmental Protection Area comprising:
  - 1 wildlife reserve: Maria Islands (1982)
  - 2 marine reserves: Mankote mangrove area (1986) & Savannes Bay and Scorpion Island (1984). Both designated RAMSAR sites (2002)
  - Nature reserve (Maria Islands)
  - National landmark (upper Moule-a-Chique)
  - Historical sites
- Legally declared in 2007
- 1,038 hectares, 688 of which is marine
- 1 of 2 EPAs designated in St. Lucia
- Management agency:
  - Ministry of Physical Development, Environment and Housing
- Marine reserves management responsibility:
  - Department of Fisheries

Importance of area for conservation

- Composed of many types of ecosystems:
  - Seagrass beds, mangroves, coral reefs and nearshore islands
- Coastal ecosystems in "relatively good state of preservation" (Espeut 2006)
- Supports
  - locally important fisheries
  - community livelihoods
- Negligible human habitation within the area but...
  - surrounding inland and coastal communities of the eastern and southern areas of Vieux Fort (2nd largest town) can impact and be impacted by the PSEPA

Activities/uses within the PSEPA

- Fishing: pot, spear, seine
  - 2 small fish landing sites (Savannes Bay and Bois Chadon)
- Sea moss farms:
  - decreased activity in recent years
- Charcoal production
- Tourism: hotels
- Turtle nesting – Bois Chadon beach
- Historical sites
- Recreational: *inter alia* beach-going (Bois Chadon & Anse de Sable), windsurfing, horseback riding, kayak tours etc.

Issues/concerns

- Anse de Sable use and user conflicts
  - Jet skis vs. motor boats in nearshore
- Overfishing
- Inappropriate/destructive fishing practices
- Land-based sources of pollution
- Loss of mangroves & seagrass beds
- Incompatible developments
- Poor enforcement capacity
- Sand-mining?
- Anything else?

PSEPA plans, projects & research

- PSEPA management plan 2009-2014
- Interpretation and Education Plan (Satney & Chase 2008)
- Management capacity assessment of MPAs in the Caribbean (Gombos et al. 2011)
- OPAAL Project
- Any others?

The SocMon fit

Linkage to PSEPA Management Plan actions and activities or is there something else?

- Strategic Area 2: Effective management of important ecosystems and resources
  - *Action 5: Management of critical ecosystems*
    - Activity 5: Develop and implement management plans for existing protected areas within the PSEPA (Page 39)

- Strategic Area 2: Effective management of important ecosystems and resources
  - *Action 6: Promotion of sustainable resource use*
    - Activity 4: Develop new/alternative livelihood initiatives to replace detrimental practices (Page 40)

- Data management
  "In developing the data management system, the MCE will ensure that, in addition to the biophysical data, more information will be gathered on types of resource use, user groups, origin of users, patterns and levels of use, use/user conflicts, impact of uses on resources, and benefits to the community." (Page 43)

Appendix 6: Key informant interview guides

<u>Group 1</u>

Savannes Bay Key Informant Interview

This interview is part of a training exercise. We would like to ask you a few questions about Savannes Bay and the Pointe Sable Environmental Protection Area.

The Pointe Sable Environmental Protection Area is…[provide brief explanation and background to the area].

1. Prior to today, have you heard about the PSEPA?
2. How did you learn about the PSEPA?
3. Can you show me on this map where the PSEPA starts and ends, i.e. the extent of the area?
4. Do you agree with the designation/implementation of the PSEPA? If yes, why?
5. Were you involved in the setting up or establishment of the PSEPA? If yes, in what way?
6. What are some of the activities conducted within Savannes Bay?
7. In terms of fishing activities, please complete the following table:
   For catch indicate whether it is increasing (+), decreasing (-) or stable (0).
   For # of fishers, indicate the number.

Type of gear used		J	F	M	A	M	J	J	A	S	O	N	D
Pots	Catch												
	# fishers												
Trolling lines	Catch												
	# fishers												
Handlines	Catch												
	# fishers												

8. Who do you think is responsible for managing the PSEPA?
9. Do you think you have a role to play in the further development and management of the EPA? What do you think your contribution is or could be to the development and effective management of the PSEPA?

Key Informant Interview Guide

Hotel manager

1. Tell me what you know about the PSEPA.
2. What areas are protected?
3. What touristic activities take place in the PSEPA?
4. What tourism products/activities does this particular hotel offer?
5. What else could you see yourself offering to become more viable?
6. What type of accommodation do you provide?
7. What type of clientele comes to this hotel?

Savannes Bay fisherman (James Daniel) and Charcoal producer (Magdalene Nelson)

1. Tell me what you know about the PSEPA.
2. What areas are protected?
3. What activities take place in the PSEPA? (map)
4. Are there any illegal activities taking place? Specify.
5. How do you make a living from activities within the PSEPA?
6. What other ways can you earn a living within the PSEPA?
7. What techniques do you use to harvest the resource? (timeline)
8. How much do you charge for the products you sell?
    a. Who are the customers?
    b. How often?
9. How valuable is it to you?

Appendix 7: Household/individual surveys
<u>Group 1</u>

ID #_____/Q#_____/____

HOUSEHOLD SURVEY

THIS QUESTIONNAIRE IS CONDUCTED AS PART OF A TRAINING EXERCISE THROUGH THE UNIVERSITY OF THE WEST INDIES AND LOCAL COUNTERPARTS TO DETERMINE THE LEVEL OF AWARENESS AND ECONOMIC IMPACT OF MARINE PROTECTED AREAS IN ST. LUCIA.

(POINTE SABLE ENVIRONMENTAL PROTECTION AREA)

<u>PLEASE CIRCLE THE APPROPRIATE ANSWER</u>

1. PLEASE INDICATE YOUR AGE RANGE
   A. 12-18   B. 19-35   C. 36 AND OVER

2. PLEASE INDICATE YOUR GENDER
   A. MALE   B. FEMALE

THE PSEPA IS A PROTECTED AREA WHICH RUNS FROM POINTE DE CALLE TO MOULE-A-CHIQUE. THIS ALSO INCLUDES SAVANNES BAY AND POINTE SABLE.

3. HAVE YOU HEARD ABOUT THE PSEPA? IF YES, GIVE A BRIEF DESCRIPTION.

4. DO YOU KNOW WHAT AN ENVIRONMENTAL PROTECTION AREA (EPA) IS?
   A. YES   B. NO

5. IF YES, WHAT DOES IT MEAN TO YOU?
   A. RESTRICTED ACCESS
   B. PROTECTION OF RESOURCES
   C. RECREATION
   D. NO TAKE ZONE
   E. NO SWIMMING
   F. OTHER (PLEASE SPECIFY)_____

6. ARE YOU FAMILIAR WITH THE RULES AND REGULATIONS PERTAINING TO THE EPA?
   A. FISHING
   B. MANKOTE MANGROVE
   C. SAVANNES MANGROVE
   D. NATURE RESERVE
   E. MARIA ISLET NATURE RESERVE
   F. MARIA ISLET MARINE RESERVE
   G. OTHER (PLEASE SPECIFY)_____

7. DO YOU KNOW OF ANY THREATS TO THE COASTAL RESOURCES?
    A. YES   B. NO

    IF YES, WHAT ARE THEY?

    _____

8. ON A SCALE OF 1-5, HOW INVOLVED WERE YOU IN THE ESTABLISHMENT OF THE PSEPA?
    1 – BEING NO PARTICIPATION
    5- BEING FULL PARTICIPATION

                    1   2   3   4   5

9. ARE YOU A MEMBER OF ANY COMMUNITY ORGANISATION?
    A. YES B. NO

    IF YES, PLEASE SPECIFY_____

10. HOW DO YOU AND THE MEMBERS OF YOUR HOUSEHOLD UTILISE THE COASTAL AND MARINE
    RESOURCES IN THE PSPEA?
    _____

11. IDENTIFY THE ACTIVITIES THAT YOU ENGAGE IN WITHIN THE EPA
    A. VENDING
    B. DAY BOAT TOURS
    C. FISHING
    D. SWIMMING
    E. BIRD WATCHING
    F. SEAMOSS FARMER
    G. OTHER_____

12. WHICH OF THESE BEST DESCRIBES YOUR AVERAGE MONTHLY INCOME?
    A. LESS THAN $1,000
    B. 1,000 – 1,499
    C. 1,500 – 5, 999
    D. 6,000 – 9, 999
    E. 10,000 AND OVER

<u>Group 2</u>

ID#_____/_____Q#____/_____

Participants of a training workshop organized by the University of the West Indies are conducting a survey to determine the awareness, uses and benefits of the Pointe Sable Environmental Protection Area

Date_____   Settlement _____

(1) What is your age range:

0-19 ☐   20-39 ☐   40-59 ☐   60 onwards

(2) Sex of the respondent.

Male ☐   Female ☐

(3) What is the highest level of education you have attained?

No Formal Education ☐

Pre-primary ☐

Primary ☐

Secondary ☐

Tertiary ☐

(4) State the number of persons in your household? _____

(5) What is your primary occupation?

(b) Do you have a secondary form of income?

Yes ☐   No ☐

(6) What is your household's most important source of income?

1

(7) (a) Do you know about the Pointe Sable Environmental Protection Area?

Yes [ ]   No [ ]

(b) If yes, what can you tell me about the PSEPA?

(8) (a) Do you know whether there are regulations governing the PSEPA?

Yes [ ]   No [ ]

(b) If yes, what are some of the regulations?

(9) Do you think that there should be regulations governing the following areas:

Mankote Mangrove	Yes [ ]	No [ ]
Savannes Bay	Yes [ ]	No [ ]
Maria Island	Yes [ ]	No [ ]

(10)   What activities do you and other members of your household do in the PSEPA do for work and for fun? (*tick all that apply*)

Sea bathing	[ ]	bird watching	[ ]	seamoss farming	[ ]
horse-back riding	[ ]	free diving	[ ]	wind surfing	[ ]
picnic/beach party	[ ]	scuba diving	[ ]	kite surfing	[ ]
cricket, volleyball	[ ]	boat rides	[ ]	kayaking	[ ]
fishing	[ ]	hiking	[ ]	tour guiding	[ ]
charcoal production	[ ]				

Other _____

2

(11)   Using the scale, strongly agree (1) , agree (2) , neither agree nor disagree (3), disagree (4), strongly disagree (5), indicate how strongly you feel about the following statements:

(a) Maria Island should be protected because of the St. Lucia Whiptail Lizard.

1 ☐   2 ☐   3 ☐   4 ☐   5 ☐

(b) The Mankote Mangrove should be managed because of its importance to various forms of livelihood.

1 ☐   2 ☐   3 ☐   4 ☐   5 ☐

(c) Fishermen should be allowed to fish anywhere in the PSEPA.

1 ☐   2 ☐   3 ☐   4 ☐   5 ☐

(d) We should encourage hotel development along Sandy Beach.

1 ☐   2 ☐   3 ☐   4 ☐   5 ☐

12) Is there any other activity that you think should be started in the PSEPA?

_____

_____

_____

Thank you for your time!

Group 1
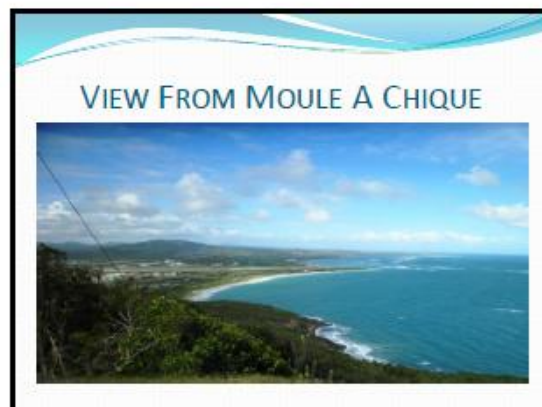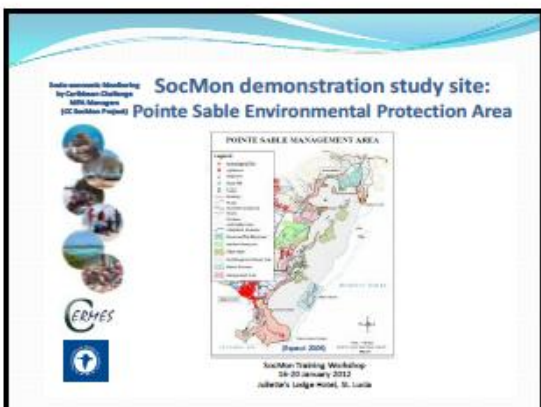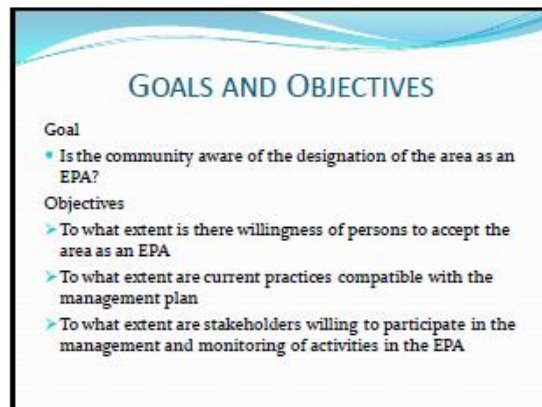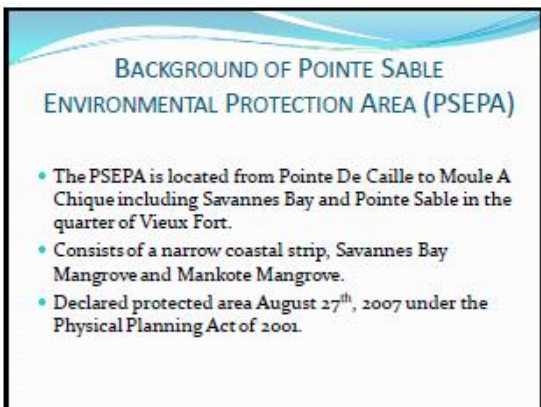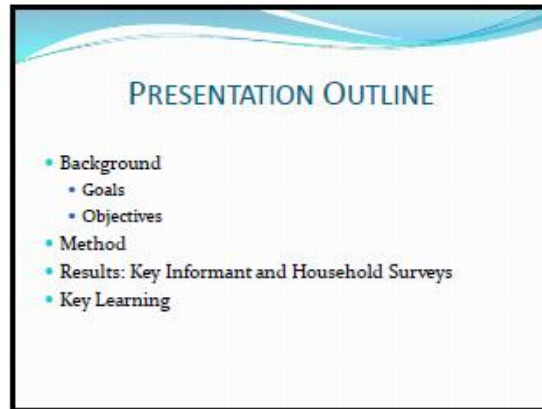
METHODOLOGY

- Survey area was identified
- 3 Key Informants (KIs) were identified and households randomly chosen
- Questionnaires were developed and pre-tested using the SocMon monitoring guidelines
- Questionnaires were administered within the study area, data was collated and analyzed.

TEAM UTILIZING SocMon GUIDELINES

KEY INFORMANT RESULTS

- KIs aware of the PSEPA prior to interview.

- KIs learnt about PSEPA from
  - colleagues
  - St. Lucia National Trust
- 2 of 3 KIs identified the extent of the area and one had a fair idea.

- KIs agreed with designation for the following reasons
  - Sustainability of flora and fauna
  - Touristic opportunities
- KIs were involved in establishment either through work, community personnel or as fishers.
- KIs indentified the following activities at Savannes Bay
  - Tours to Scorpion and Maria Island
  - Fishing (Seine, Trolling and Pot)
  - Savannes Bay Day/Feasts

SEASONAL CALENDAR FOR SAVANNES BAY

Type of gear used		J	F	M	A	M	J	J	A	S	O	N	D
Pots	Season Catch						−	−	−	−	−−	−	−
	# fishers						✖	✖	✖	✖	✖	✖	✖
Trolling lines	Season Catch	−	−−	−−	−−	−							
	# fishers	✖	✖	✖	✖	✖							
Handlines	Season Catch	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	# fishers	●	●	●	●	●	●	●	●	●	●	●	●

Key
Catch: increasing (+), decreasing (−) or stable (o)
(−−) represents the fishing season   ● 10 fishers

ECONOMIC ACTIVITY WITHIN PSEPA

FISHING   VENDING   CHARCOAL PRODUCTION

- KIs thought that the Saint Lucia National Trust, Government and other users of the resources earning a livelihood should manage the PSEPA.

- The respondents believe that their role could be to
  - report illegal activities to relevant authorities.
  - work with authorities to further develop the area in a sustainable manner.
  - collaborate with other agencies in public and private sectors, NGO's, quasi government, local groups and the users of the resource
  - minimise pollution in and around the protected area
  - be part of any organisation/group set up to oversee the management of the area

HOUSEHOLD SURVEY RESULTS

AGE OF RESPONDENTS

HOUSEHOLD SURVEY

GENDER DISTRIBUTION

Household Survey

PSEPA AWARENESS

Household Survey

EPA AWARENESS

Household Survey

Meaning of EPA to Respondents

Household Survey — EPA RULES AND REGULATIONS

Household Survey — Respondents Involvement in PSEPA Establishment

Household Survey — Percenatge
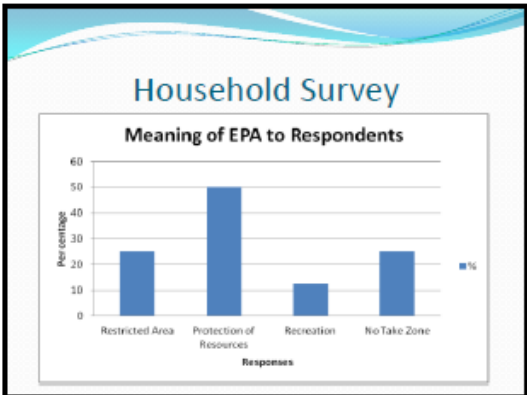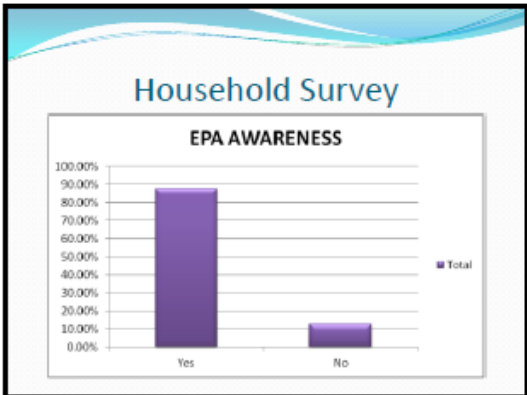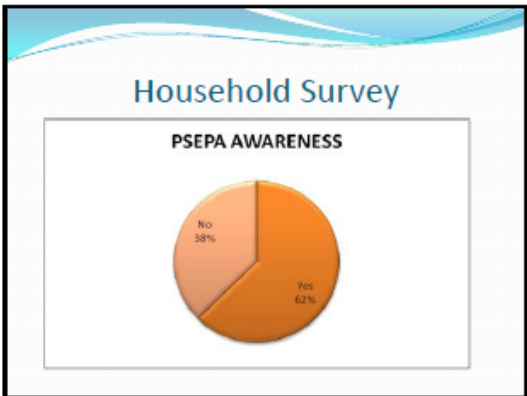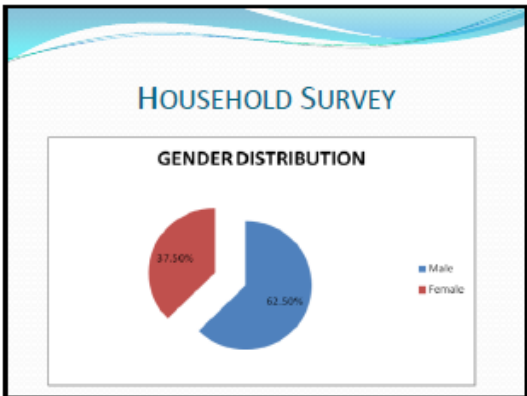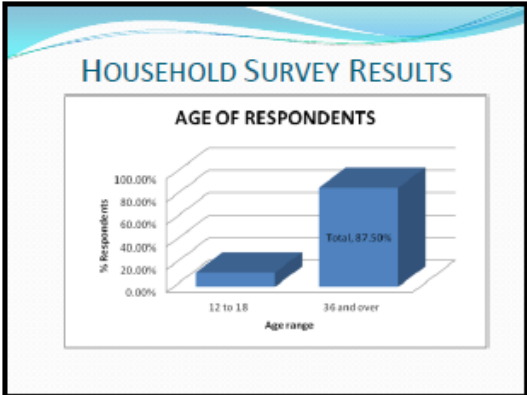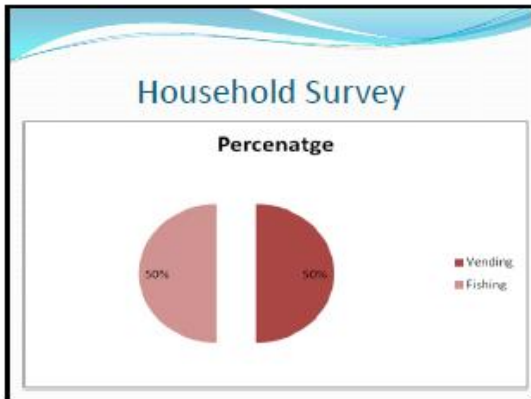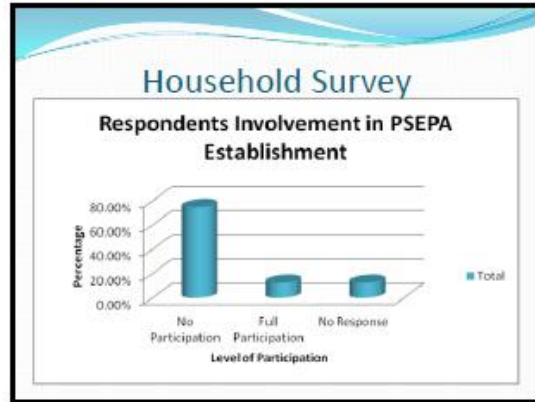
KEY LEARNING

- Respondents are willing to accept the areas designation as an EPA
- Fishers within the Savannes Bay area are quite knowledgeable of the EPA
- To some extent, fishers and the community at large practices, are in keeping with the management plan as it relates to fishing.
- Results indicate that they are participating in the management of the EPA.

Thank You

The End

Socio-Economic Monitoring of the Point Sable Environmental Protection Area

Anthony Sammie, Allena Joseph, Bethia Daniel, Faustinus Faisal, Nadia Cazaubon
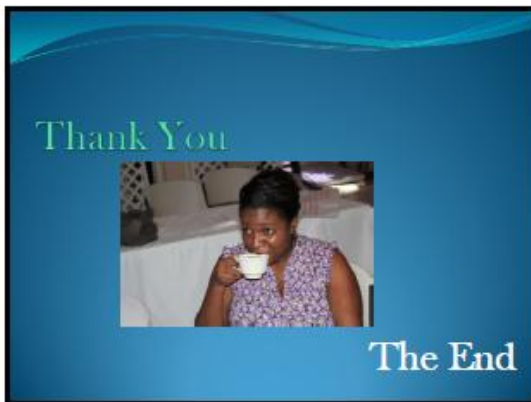
GOAL

To determine the extent to which people are aware of and benefit from touristic opportunities in the PSEPA.

OBJECTIVES

- To determine the level of awareness of the PSEPA.

- To determine the existing and potential livelihood opportunities within the PSEPA

- To determine the number of households currently benefiting (economically) from the PSEPA

Pointe Sable Environmental Protection Area

- Environmental Protection Area comprising:
  - 1 wildlife reserve: Maria Islands (1982)
  - 3 marine reserves: Maria Island Marine Reserve, Mankote mangrove area (1986) & Savannes Bay both designated RAMSAR sites (2002)
  - Nature reserve (Maria Islands)
  - National landmark (upper Moule-a-Chique)
  - Historical sites
- Legally declared in 2007
- 1,038 hectares, 688 of which is marine
- 1 of 2 EPAs designated in St. Lucia
- Management agency:
  - Ministry of Physical Development, Environment and Housing
- Marine reserves management responsibility:
  - Department of Fisheries

Pointe Sable Environmental Protection Area

- Fishing: pot, spear, seine
  - 2 small fish landing sites (Savannes Bay and Bois Chadon)
- Sea moss farms:
  - decreased activity in recent years
- Charcoal production
- Tourism: hotels
- Turtle nesting – Bois Chadon beach
- Historical sites
- Recreational: inter alia beach-going (Bois Chadon & Anse de Sable), windsurfing, horseback riding, kayak tours etc.

Method

- Preparatory Activities

Data Collection
- Secondary
- Key Informant
- Household interviews

Data Analysis

KEY INFORMANT INTERVIEWS

Savannes Bay- James Daniel

Mankote Mangrove- Magdaline Nelson

Hotel Proprietor- Andrew Paul

Key Informant Responses

Issue	Fisherman	Charcoal Producer	Guest House Manager
Knowledge of PSEPA	Protected area	Mankote Mangroves is a part of PSEPA	not very knowledgeable
Area protected	Entire area from Moule a Chique to Savannes Bay	Only Mangroves	Savannes Bay, Maria Islands
Existing touristic activities			wind and kite surfing, scuba diving, Maria Island tours, sight seeing at Moule a chique
Tourism product from hotel			accommodation, events and advises guests on tours. Would like to explore becoming a tour operator for bird watching
Tourist clientele profile			north american stay over visitors, airport workers, airline crew and bird watchers
Existing activities	commercial fishing, near shore island tours, fishing tours, diving, sea moss production, charcoal production, horse back riding	Fishing, Sea moss production, charcoal production, horseback riding, mangrove tours, bird watching tours, kite surfing, recreational beach use, moule a chique tours	
Illegal activities	sand mining, drug trade	Illegal mangrove harvesting, sand mining, illegal fishing in mangroves	
Economic activity within PSEPA	commercial fishing, subsistence farming, offshore island tours, fishing tours	charcoal, almond, tour guide (mangrove and birds), subsistence farming	

Key Informant Responses

Coastal and Marine Activity	Goods & Services	Techniques	Value of goods and services	Market Orientation
Fisheries	Lobster	Pots	High ($15/lb)	local
	Reef Fish	Spears, Pots	Medium	
	Pelagic migratory species	FAD Trolling	Low to medium ($5/lb - $7/lb)	
		Seine		
		Fillet		
		Hand (mangrove)	subsistence	
Tourism	Eco-tours	Bird watching, island tours, mangrove tours	low ($250 per tour but only 4 tours per year)	local, regional and international
	Recreational beach activities	sea bathing, kite surfing, keyaking	high recreational value	
	Fishing tours		low (high value per tour but very infrequent)	
	Hotel accommodation	guest houses, all inclusive hotel	medium (potential tourism $)	
Forestry	Charcoal production	sustainable harvest	low ($50/bag or $10/bucket). Although value is high, production is low	local

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Timeline

Jan	Feb	Mar	April	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

Pelagic Migratory Species

Lobster, Pot Fish

Charcoal Production
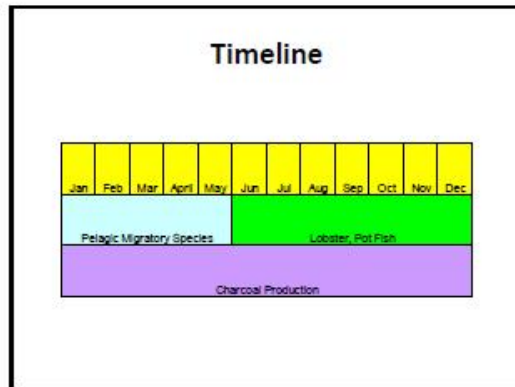
Household Interviews

- 10 households interviewed from the town of Vieux Fort.

Results and Data Analysis

Potential Activities for PSEPA

Need for Protection

Maria Islands should be protected because of the St. Lucia Whiptail Lizard

Mankote Mangrove should be managed because of its importance to various forms of livelihood

Fishermen should be allowed to fish anywhere in the PSEPA

We should encourage hotel development along Sandy Beach
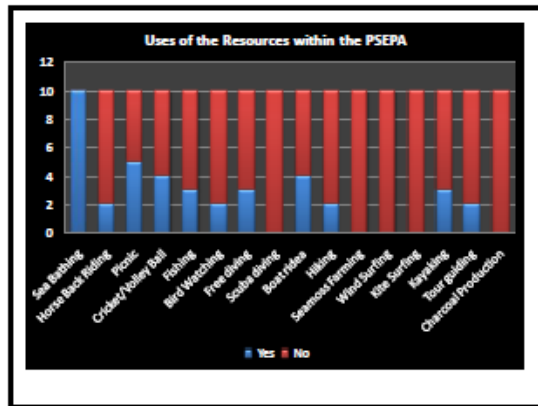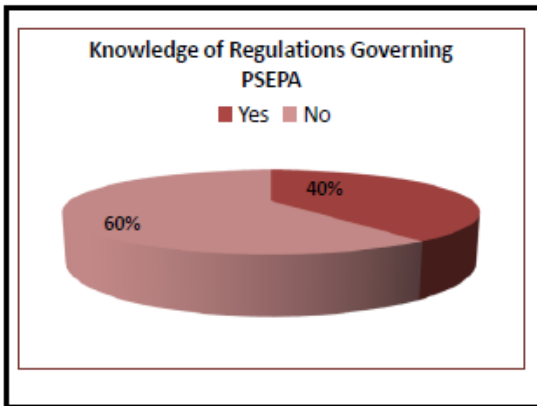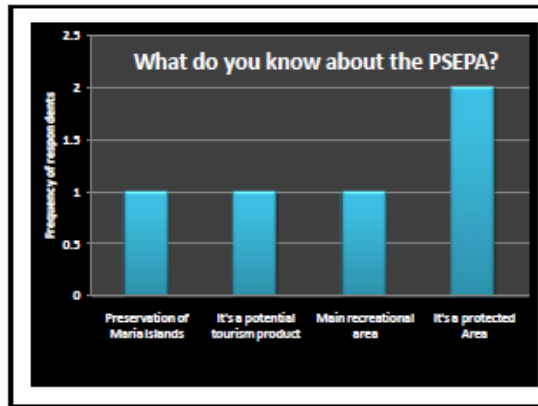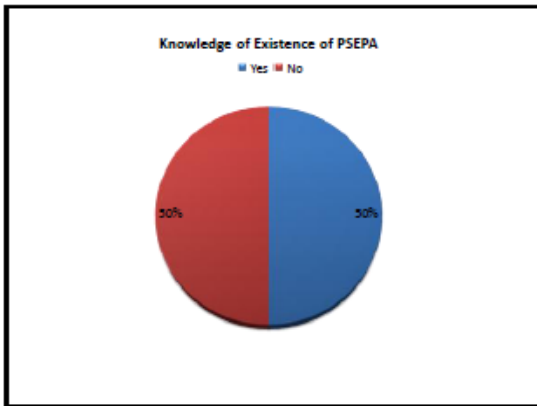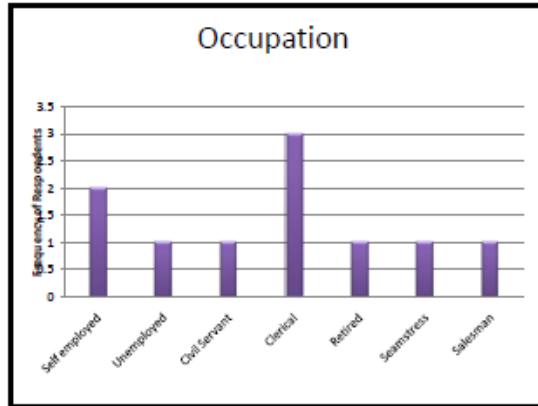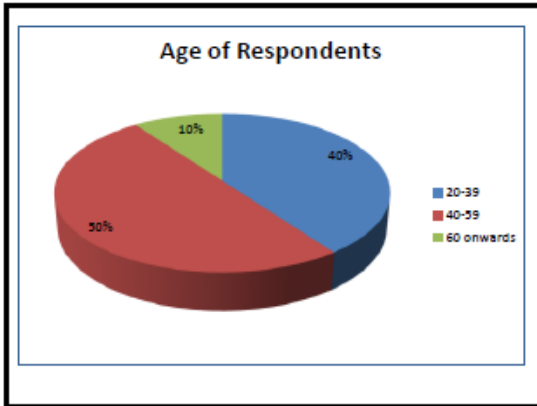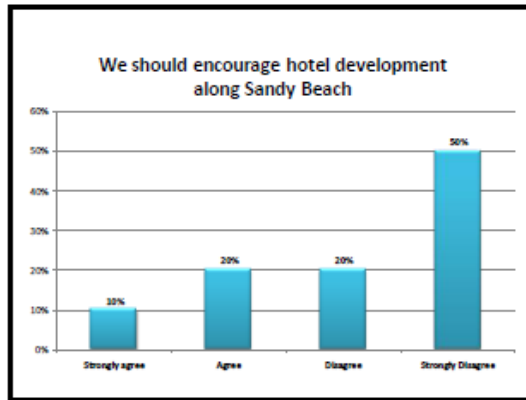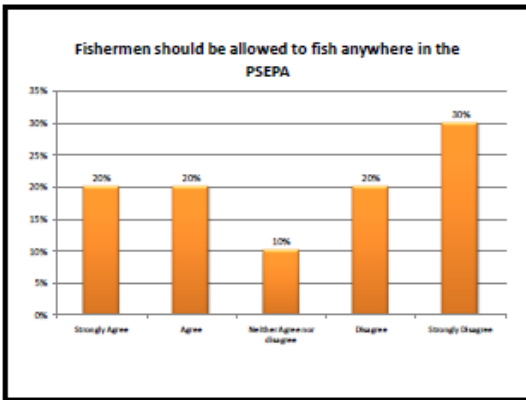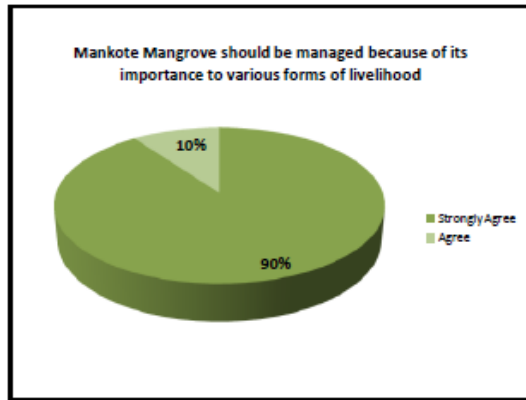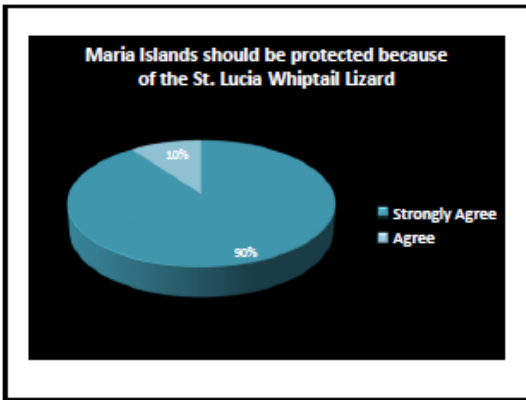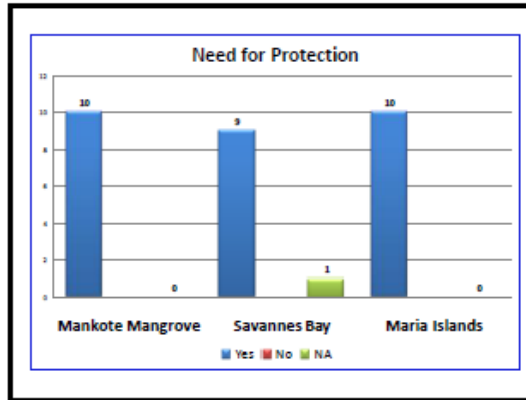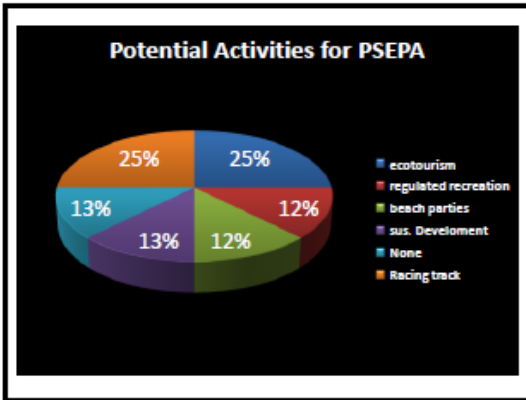
Key Lessons

- There is a greater knowledge of the resources within PSEPA than there is knowledge on the existence of the PA
- There is a great value placed on the resources within the PSEPA
- There is much potential for livelihood opportunities within the area
- Persons recognise the need for its protection

Questions

Thank You!

<u>Group 1</u>

Socio-economic Monitoring by Caribbean Challenge MPA Managers (Caribbean Challenge SocMon)
16-20 January 2012, St. Lucia

Preparatory activities worksheets used to plan monitoring

These worksheets are *guides* to organising the preparatory activities. They can be modified in any way you find useful. Other worksheets are in the socio-economic manual. Spreadsheets are often more convenient than word processing applications for working with tables of all types.

1. Goals and objectives guiding socio-economic monitoring

Monitoring goal	Monitoring objectives (three SMART ones)
To determine the awareness of the Savannes Bay community of the designation of the area as an EPA	1. To what extent is there willingness of persons to accept the area as an EPA
	2. To determine to what extent the current practices are compatible with the management plan
	3. To what extent are stakeholders willing to participate in management of the EPA or activities

2. Defining the study area

| Study area selection criteria	Study area description (or attach area map)
Savannes Bay	• Fish landing site • Community • Recreational site (social)

3. Stakeholder identification

Study area activity or issue	Primary stakeholder [and organisation]	Secondary stakeholder [and organisation]
Fish landing site	Fishers	
Recreational sites	Residents/restaurantees	
Vending (fish, shop)	Vendors	

4. Stakeholder locations and key informants

Stakeholders (1° and 2°)	Location of stakeholder	Key informants for stakeholders
Fishers	Savannes Bay	Mr. James Daniel
Fishers	Savannes Bay	Mr. John Roberts

5. SocMon leader and team

Skill requirement or role on team	Names and affiliations of team leader and members

6. Work plan schedule

Activity / task Day →	1	2	3	4	5
Preparatory activities					
Site visit and determination of study boundaries	X				
Develop proposed topic, goals and objectives	X				
Inform community of project	X				
Secondary data collection					
Review existing management plan for PSEPA		X			
Primary data collection and observation					
Develop key informant interview guide		X			
Design household survey			X		
Pre-test survey			X		
Administer survey			X		
Data analysis and interpretation					
Data coding and entry				X	
Data analysis				X	
Data reporting			X	X	
Validation, communication, adaptation					
Create presentation (present findings)					X

St. Lucia SocMon Caribbean training workshop

7. Key variables to be monitored

	Key informant interview/secondary sources variables		
Var. No.	Variable to monitor	Obj. 1, 2, 3...	
K1.	Study area		
K2.	Population	**1, 2, 3**	
K3.	Number of households		
K 4.	Migration rate		
K5.	Age		
K6.	Gender		
K7.	Education		
K8.	Literacy		
K9.	Ethnicity		
K10.	Religion		

3

	Key informant interview/secondary sources variables		
Var. No.	Variable to monitor	Obj. 1, 2, 3...	
K11.	Language		
K12.	Occupation	1, 2, 3	
K13.	Community infrastructure and business development		
K14.	Activities	2	
K15.	Goods and services	2	
K16.	Types of use	1, 2, 3	
K17.	Value of goods and services		
K18.	Goods and services market orientation		
K19.	Use patterns	1, 2, 3	
K20.	Levels and types of impact	1, 2, 3	
K21.	Level of use by outsiders		

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St. Lucia SocMon Caribbean training workshop

	Key informant interview/secondary sources variables		
Var. No.	Variable to monitor	Obj. 1, 2, 3...	
K22.	Household use		
K23.	Stakeholders		
K24.	Tourist profile		
K25.	Management body		
K26.	Management plan		
K27.	Enabling legislation		
K28.	Management resources		
K29.	Formal tenure and rules		
K30.	Informal tenure and rules, customs and traditions		
K31.	Stakeholder participation	1, 3	

5

Key informant interview/secondary sources variables			
Var. No.	Variable to monitor	Obj. 1, 2, 3...	
K32.	Community and stakeholder organisations	1, 3	
[New]	Awareness	1,2,3	
[New]			

Survey variables			
Var. No.	Variable to be monitored	Obj. 1, 2, 3...	
S1.	Age	✔	
S2.	Gender	✔	
S3.	Ethnicity		
S4.	Education	✔	
S5.	Religion		
S6.	Language		

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St. Lucia SocMon Caribbean training workshop

	Survey variables		
Var. No.	Variable to be monitored	Obj. 1, 2, 3...	
S7.	Occupation	✔	
S8.	Household size	✔	
S9.	Household income	1	
S10.	Household activities	2	
S11.	Household goods and services	2	
S12.	Types of household uses	2, 3	
S13.	Household market orientation		
S14.	Household uses	2	
S15.	Non-market and non-use values	2	
S16.	Perceptions of resource conditions	1, 2	
S17.	Perceived threats	2, 3	

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	Survey variables		
Var. No.	Variable to be monitored	Obj. 1, 2, 3...	
S18.	Awareness of rules and regulations	1, 2, 3	
S19.	Compliance	1, 2, 3	
S20.	Enforcement		
S21.	Participation in decision-making	3	
S22.	Membership in stakeholder organizations	3	
S23.	Perceived coastal management problems		
S24.	Perceived coastal management community solutions		
S25.	Perceived community problems		
S26.	Successes in coastal management		
S27.	Challenges in coastal management		

8

	Survey variables		
Var. No.	Variable to be monitored	Obj. 1, 2, 3...	
S28.	Material style of life		
S29	Study area		

8. Interview sample design

Depending on many factors ranging from the objectives of monitoring to area demographics, you need to determine 'how' and 'how many' for selection of key informants and households.

a. Key informants	b. Households
Critical information areas Fishing	Estimated number of households in study area and means of obtaining estimate Uncertain
No. of informants: 3	Approx. sample size: 5
Selection process: Knowledge of priority areas/activities	Sample selection method: Random

9. Draft interview (key informant and household) questions

	Key informant questions/interview guide (open-ended questions to encourage discussion)
Var. No.	Question
	See attached

9

Household survey questions/questionnaire (craft questions with different layouts)	
Var. No.	Question
	See attached

10. Visualisation techniques

Technique and page in manual	Variable and objective nos.	Notes on application of the technique to the variable and objectives (e.g. for all or some stakeholders? Issues?)
Maps – 113		
Transects – 119		
Timelines – 121		
Seasonal calendars – 125		
Historical transects – 129		
Decision trees – 131		
Venn diagrams – 133		
Flow charts – 136		
Ranking – 138		

11. Key points to consider in data analysis and interpretation

1   Time was not set according to the availability of respondents but rather due to the training schedule
2 There may not be true representation of survey area

12. Communication plan and issues in arrangements for communication and validation

Communication and validation of results and key learning is often done in workshops, but other means are used to supplement this and ensure that various audiences receive the outputs. However done, there will always be some practical matters to address, i.e. issues in arrangements for communication and validation.

Target audience	Communication product(s)	Communication pathway(s)	Practical matters
Fishers	PSA Presentation	Meeting Face to face	Convenience (time)

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St. Lucia SocMon Caribbean training workshop

Target audience	Communication product(s)	Communication pathway(s)	Practical matters
Policy makers	Exec report	Cabinet	Convenience (time)
NGOs	Flyers Posters Letters (print media)	Consultation workshop	Financial constraint
Community leaders	Letters	Consultation workshop Media	Time of airing

13. Any other notes (optional)

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Socio-economic Monitoring by
Caribbean Challenge MPA Managers
(Caribbean Challenge SocMon)
16-20 January 2012, St. Lucia

Preparatory activities worksheets used to plan monitoring

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1. Goals and objectives guiding socio-economic monitoring

Monitoring must have a goal and specific objectives for being undertaken. These are often based on management plans (e.g. fisheries, MPA, tourism) or other expressions of policy.

Monitoring goal	Monitoring objectives (three SMART ones)
To determine the extent to which people are aware of and how they benefit from tourism opportunities in the Point Sable Environment Protection Area (PSEPA).	1. To determine the level of awareness of persons of the PSEPA.
	2. To determine the existing and potential livelihood opportunities within the PSEPA.
	3. To determine the number of households currently benefitting (economically) from the PSEPA.

2. Defining the study area

Using the information on issues and stakeholders, define the geographic area appropriate for the study site (contains all or most critical activities/issues and stakeholders). Document the specific selection criteria that you used. Clearly identifying the study area is important in identifying use patterns and potential threats to resources. The study area should include where the stakeholders live and work.

Study area selection criteria	Study area description (or attach area map)
Vieux Fort Town (proximity to PSEPA)	
Belle Vue (proximity to PSEPA)	
Pierrot (proximity to PSEPA)	
Aupicon (proximity to PSEPA)	
La Ressource (proximity to PSEPA)	

1

3. Stakeholder identification

Stakeholder identification and selecting the boundaries for the study site are iterative processes. Start by identifying the activities in the area and then determine who the likely stakeholders are. Name their organisation, if any.

Study area activity or issue	Primary stakeholder [and organisation]	Secondary stakeholder [and organisation]
Fishing	Fishermen	restaurant owners, residents, fish reseller
Charcoal production	Charcoal producers	bar-be-que vendors, residents, supermarkets.
Seamoss production	Seamoss producers	householders, supermarkets
Horse-back riding	Stable owners, horse owners, informal horse-back riders	Tourists
Water sports - Wind and kite surfing - Kayaking	Wind and kite surfers, kayakers	Tourists
Craft production	Craft producers	locals, tourists
Tourism	Hoteliers	Tourists
Recreational	Sea bathers, residents	

4. Stakeholder locations and key informants

The communities where SocMon will take place will depend primarily on the stakeholders involved in coastal management. Suggest key persons who can talk about the larger population.

Stakeholders (1° and 2°)	Location of stakeholder	Key informants for stakeholders
Charcoal Producer	Mankote Mangrove	Magdalene Nelson; leader of Charcoal Producers Group
Sea Moss Producer	Pierrot, Bois Chadon	Lina Francis; Sea moss farmer
Fishing	Savannes Bay Lobster Port Vieux Fort	Savannes Bay Key Fisher Lobster Port Key Fisher Vieux Fort Key Fisher
Recreational	Vieux Fort Town	Southern Tourism Development Co-operation

2

St. Lucia SocMon Caribbean training workshop

5. SocMon leader and team

Although an initial study or monitoring can be done by a single person (e.g. MSc student), the process is intended to be undertaken by an interdisciplinary team, the size and the required talents of which partly depend on the goal and objectives of the study or monitoring program. What types of expertise do you need and where from?

Skill requirement or role on team	Names and affiliations of team leader and members
Programme Officer South; knowledge of area	Anthony Sammie
Social Scientist	Nadia Cazaubon
Ecologist	Allena Joseph
Economist	Bethia Daniel
Community Development Officer	Faustinus Faisal

6. Work plan schedule

A SocMon study should take no more than one month however duration varies between 3-8 weeks, so you need to schedule your work accordingly, remembering the SocMon stages including validation. For the purposes of this training workshop, set out up to three tasks under each heading for your demonstration site study.

Activity / task Day →	1	2	3	4	5
Preparatory activities					
Preliminary site visit	X				
Develop proposed topic, goals and objectives	X				
Inform community of project	X				
Secondary data collection					
Determine what secondary data exists; literature review.	X	X			
Literature Review	X	X			
Gap Analysis	X	X			
Primary data collection and observation					
Determine and prepare data collection methods.		X			

3

St. Lucia SocMon Caribbean training workshop

Activity / task Day →	1	2	3	4	5
Interview key informants.		X			
Household surveys.		X			
Data analysis and interpretation					
Data Coding and entry			X	X	
Data analysis			X	X	
Data interpretation			X	X	
Data reporting			X	X	
Validation, communication, adaptation					
Validation exercises with key stakeholders					X
Completion of final report					X

7. Key variables to be monitored

Based on the goal and objectives of the monitoring, you need to determine which (if not all) of the SocMon Caribbean variables need to be measured, sources of secondary information to consult before interviewing (key informant or household), and practical considerations for each variable. The practical considerations include levels of difficulty in acquiring information, issues, error or uncertainty, challenges in implementing fieldwork, links to data sources that are desirable, etc.

Remember the two types of variables: Key informant interview/secondary sources variables (K) and survey variables (S).

Also remember that if a variable specific to your purposes of monitoring is not available among the 60 SocMon Caribbean variables, you can add new variables.

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	Key informant interview/secondary sources variables		
Var. No.	Variable to monitor	Obj. 1, 2, 3...	
K1.	Study area	1	
K2.	Population	3	Local Statistics Office
K3.	Number of households	3	Local Statistics Office
K 4.	Migration rate	2	
K5.	Age	1, 2, 3	
K6.	Gender	2, 3	
K7.	Education	1, 2,3	
K8.	Literacy	1, 2, 3	
K9.	Ethnicity		
K10.	Religion		
K11.	Language	1, 2	

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St. Lucia SocMon Caribbean training workshop

	Key informant interview/secondary sources variables		
Var. No.	Variable to monitor	Obj. 1, 2, 3...	
K12.	Occupation	2, 3	
K13.	Community infrastructure and business development	2, 3	
K14.	Activities	1,2,3	
K15.	Goods and services	2, 3	
K16.	Types of use	2	
K17.	Value of goods and services	2, 3	
K18.	Goods and services market orientation	2, 3	
K19.	Use patterns	2	
K20.	Levels and types of impact		
K21.	Level of use by outsiders	2	
K22.	Household use	2,3	

6

St. Lucia SocMon Caribbean training workshop

	Key informant interview/secondary sources variables		
Var. No.	Variable to monitor	Obj. 1, 2, 3...	
K23.	Stakeholders	1,2,3	
K24.	Tourist profile	2	
K25.	Management body		
K26.	Management plan		
K27.	Enabling legislation	1	
K28.	Management resources		
K29.	Formal tenure and rules		
K30.	Informal tenure and rules, customs and traditions		
K31.	Stakeholder participation		
K32.	Community and stakeholder organisations		

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St. Lucia SocMon Caribbean training workshop

Key informant interview/secondary sources variables			
Var. No.	Variable to monitor	Obj. 1, 2, 3...	
[New]			
[New]			

Survey variables			
Var. No.	Variable to be monitored	Obj. 1, 2, 3...	
S1.	Age	✔	
S2.	Gender	✔	
S3.	Ethnicity		
S4.	Education	✔	
S5.	Religion		
S6.	Language		
S7.	Occupation	✔	

8

	Survey variables		
Var. No.	**Variable to be monitored**	**Obj. 1, 2, 3...**	
S8.	Household size	✔	
S9.	Household income	✔	
S10.	Household activities	✔	
S11.	Household goods and services	✔	
S12.	Types of household uses		
S13.	Household market orientation		
S14.	Household uses	✔	
S15.	Non-market and non-use values	✔	
S16.	Perceptions of resource conditions	✔	
S17.	Perceived threats	✔	
S18.	Awareness of rules and regulations	✔	

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St. Lucia SocMon Caribbean training workshop

		Survey variables	
Var. No.	**Variable to be monitored**	**Obj. 1, 2, 3…**	
S19.	Compliance		
S20.	Enforcement		
S21.	Participation in decision-making		
S22.	Membership in stakeholder organizations		
S23.	Perceived coastal management problems		
S24.	Perceived coastal management community solutions		
S25.	Perceived community problems		
S26.	Successes in coastal management		
S27.	Challenges in coastal management		
S28.	Material style of life		

St. Lucia SocMon Caribbean training workshop

Survey variables			
Var. No.	Variable to be monitored	Obj. 1, 2, 3...	
S29	Study area	✓	

8. Interview sample design

Depending on many factors ranging from the objectives of monitoring to area demographics, you need to determine 'how' and 'how many' for selection of key informants and households.

a. Key informants	b. Households
Critical information areas Fishing Charcoal Production Hoteliers James Daniel Magdalene Nelson Andrew Paul	**Estimated number of households in study area and means of obtaining estimate** 1000 households
No. of informants: 3	**Approx. sample size:** 100
Selection process: Knowledge of priority areas/activities	**Sample selection method:** Stratified Random Sampling

9. Draft interview (key informant and household) questions

There are many ways of asking the same question (content) and many types of question layout (structure). Rules apply. Select about five variables in your study and draft at least two questions per variable to get information from respondents. For household survey questions demonstrate that you can craft questions well using a variety of layouts.

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– Juliette's Lodge Manager

<table>
<tr><td colspan="2" align="center">**Key informant questions/interview guide**
(open-ended questions to encourage discussion)</td></tr>
<tr><td>**Var. No.**</td><td>**Question**</td></tr>
<tr><td>**K1**

Study Area</td><td>Tell me what you know about the PSEPA.

What areas are protected?</td></tr>
<tr><td>**K14**

Activities</td><td>What touristic activities take place in the PSEPA?</td></tr>
<tr><td>**K15**

Goods and Services</td><td>What tourism products/activities does this particular hotel offer?

What else could you see yourself offering to become more viable?</td></tr>
<tr><td>**K16**

Types of Use</td><td>What type of accommodation do you provide?</td></tr>
<tr><td>**K17**

Touristic Profile</td><td>What type of clientele comes to this hotel?</td></tr>
</table>

James Daniel – Savannes Bay Fisherman

<table>
<tr><td colspan="2" align="center">**Key informant questions/interview guide**
(open-ended questions to encourage discussion)</td></tr>
<tr><td>**Var. No.**</td><td>**Question**</td></tr>
<tr><td>**K1**

Study Area</td><td>Tell me what you know about the PSEPA.

What areas are protected?</td></tr>
</table>

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Key informant questions/interview guide (open-ended questions to encourage discussion)	
Var. No.	**Question**
K14 **Activities**	What activities take place in the PSEPA? (map) Are there any illegal activities taking place? Specify
K15 **Goods and Services**	How do you make a living from activities within the PSEPA? What other ways can you earn a living within the PSEPA?
K16 **Types of Use**	What techniques do you use to harvest the resource? (timeline)
K17 **Value of Goods and Services**	How much do you charge for the products you sell? - Who are the customers? - How often? How valuable is it to you?

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Magdalene Nelson – Charcoal Producer, Mankote

	Key informant questions/interview guide (open-ended questions to encourage discussion)
Var. No.	**Question**
K1 **Study Area**	Tell me what you know about the PSEPA. What areas are protected?
K14 **Activities**	What activities take place in the PSEPA? (map) Are there any illegal activities taking place? Specify
K15 **Goods and Services**	How do you make a living from activities within the PSEPA? What other ways can you earn a living within the PSEPA?
K16 **Types of Use**	What techniques do you use to harvest the resource? (timeline)
K17 **Value of Goods and Services**	How much do you charge for the products you sell? - Who are the customers? - How often? How valuable is it to you?

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	Household survey questions/questionnaire (craft questions with different layouts)	
Var. No.	**Question**
S1 Age	What is your age range: 0-19 20-39 40-59 60 onwards
S2 Gender	Male Female
S4 Education	What is your level of education? No Formal Education, Pre-primary, Primary, Secondary, Tertiary
S7 Occupation	What is your primary occupation? Do you have a secondary form of income?
S8 Household Size	No. of persons in the household _____.
S9 Household Income	What is your household's most important source of income?
S10 Household Activities	What activities do you and other members of your household do in the PSEPA do for work and for fun? Sea bathing, horse-back riding, picnic/beach party, cricket, volleyball, port fishing, spear fishing, pelagic fishing, free diving, scuba diving, boat rides, hiker, tour guiding, bird watching, wind surfing, kite surfacing, kayaking, seamoss farming, charcoal production
S11 Household goods and services	
S14 Household Uses	
S 15 Non-market and non-use Values	Do you think that there should be regulations governing the following areas: Mankote Mangrove Yes No Savannes Bay Yes No Maria Island Yes No
S16 Perceptions of resource conditions	
S17 Perceived threats	
S18 Awareness of rules and regulations	Do you know whether there are regulations governing the PSEPA? If yes, what are some of the regulations? Using a scale of strongly agree, agree, neither agree nor disagree, disagree, strongly disagree, indicate how you feel about the following statements. Do you think that there should be regulations governing the following areas:

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Household survey questions/questionnaire (craft questions with different layouts)	
Var. No.	**Question**
	Mankote Mangrove Savannes Bay Maria Island
S29 Study Area	Do you know about the Pointe Sable Environmental Protection Area? If yes, what can you tell me about the PSEPA?

10. Visualisation techniques

The GCRMN manual describes several visualisation techniques that are useful for collecting, displaying and communicating socio-economic data informatively to document or assist decision-making. Many methods may be used simultaneously or sequentially. The means of presenting socio-economic monitoring results is critical in showing relationships among the data. Which methods will you use?

Technique and page in manual	Variable and objective nos.	Notes on application of the technique to the variable and objectives (e.g. for all or some stakeholders? Issues?)
Maps – 113		
Transects – 119		
Timelines – 121	2, 3	Used for only one stakeholder – The key fisher in the Savannes Bay area, to explain how techniques for harvesting fish changed over the years.
Seasonal calendars – 125		
Historical transects – 129		
Decision trees – 131		
Venn diagrams – 133		
Flow charts – 136		
Ranking – 138		

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11. Key points to consider in data analysis and interpretation

Depending on the nature of the study site and your monitoring process there are often special points to consider as you analyse and interpret data. These may be assumptions, constraints or expertise required. You will need to know these beforehand and to write them up with results.

1	Lack of financial resources to conduct and analyse data.
2	Field trips were conducted in an ad-hoc manner, in keeping with workshop schedule and not necessarily the most appropriate time for conducting interviews.
3	Time constraints; insufficient time to analyse and interpret data.

12. Communication plan and issues in arrangements for communication and validation

Communication and validation of results and key learning is often done in workshops, but other means are used to supplement this and ensure that various audiences receive the outputs. However done, there will always be some practical matters to address, i.e. issues in arrangements for communication and validation.

Target audience	Communication product(s)	Communication pathway(s)	Practical matters
Policy Makers	Policy Briefs, Presentations	Cabinet meeting, sub-committee meeting, documentation, familiarisation tours.	Availability of policy maker
NGOs and CBOs	Presentations, Videos, Pamphlets	Discussion forum, familiarisation tours.	Financial resources
Resource users of the PSEPA	Presentations, Videos, Posters and Leaflets	Town-hall meetings, one-on-one discussions, focus group sessions	Availability of resource users within working hours, Financial resources
Government Agencies	Reports, Executive Summary	Conferences, workshops, seminars	Financial resources
Civil Society	Posters, Leaflets, Pamphlets, Public Service Announcement	Town-hall meetings, Group discussions, Talk Shows, Electronic Media	Financial resources

13. Any other notes (optional)

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Appendix 10: Workshop evaluation

Participant Evaluation of the
"Socio-economic Monitoring by Caribbean Challenge MPA Managers" Workshop

_____

Directions: Please rate how much you agree or disagree with each of the statements listed below.

The goal of this workshop was for MPA managers and field staff (& MPA stakeholders) to learn how to develop and implement socio-economic monitoring programs for strategically selected sites using the methods outlined within the *Socioeconomic monitoring guidelines for coastal managers in the Caribbean (SocMon Caribbean)* and *Socioeconomic manual for coral reef management.*

1. The goal for this workshop was fully achieved.

___ strongly agree
___ agree
___ neither agree nor disagree
___ disagree
___ strongly disagree
___ I don't know

There were **two objectives** associated with this goal to be achieved by workshop participants:

- To introduce socio-economic monitoring using SocMon Caribbean methods.
- To develop a feasible SocMon site monitoring plan and timeline for the study site for implementation

2. The first objective of this workshop (introduction to SocMon Caribbean methods) was fully achieved.

___ strongly agree
___ agree
___ neither agree nor disagree
___ disagree
___ strongly disagree
___ I don't know

3. The second objective of this workshop (development of a SocMon monitoring plan and timeline) was fully achieved.

___ strongly agree
___ agree
___ neither agree nor disagree
___ disagree
___ strongly disagree
___ I don't know

4. My own (personal) expectations for why I attended this workshop were fully achieved.

___ strongly agree
___ agree
___ neither agree nor disagree
___ disagree
___ strongly disagree
___ I don't know

5. The workshop was well organised.

___ strongly agree
___ agree
___ neither agree nor disagree
___ disagree
___ strongly disagree
___ I don't know

6. The workshop was well facilitated.

___ strongly agree
___ agree
___ neither agree nor disagree
___ disagree
___ strongly disagree
___ I don't know

7. I would recommend my colleagues to attend a workshop similar to this one.

___ strongly agree
___ agree
___ neither agree nor disagree
___ disagree
___ strongly disagree
___ I don't know

8. My abilities as a MPA professional (or stakeholder) have been improved as a result of this workshop.

___ strongly agree
___ agree
___ neither agree nor disagree
___ disagree
___ strongly disagree
___ I don't know

9. I enjoyed participating in this workshop.

___ strongly agree
___ agree
___ neither agree nor disagree
___ disagree
___ strongly disagree
___ I don't know

10. The things I liked most about this workshop were: (list/write)

11. The things I liked least about this workshop were: (list/write)

12. If I had to recommend that some changes be made on the workshop, they would be: (list/write)

13. Other thoughts, comments, or suggestions?

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