Socio-economic monitoring by Caribbean Challenge MPA Managers

Report No. 3

Report of the Grenada SocMon Caribbean Training Workshop Fisheries Division, Grenada 6-10 February 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

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Disclaimer

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1 WORKSHOP WELCOME

Following the agenda (Appendix 1), Maria Pena welcomed participants (Appendix 2) to the final 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, but noted that the originally planned 5-day workshop would have to be condensed into four days due to the Independence Public Holiday on 7 February. She highlighted that CERMES is partnering with the Grenada Fisheries Division to conduct the workshop in Grenada. 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 2007 *Socio-economic monitoring by Caribbean fisheries authorities* project and the socio-economic assessment conducted on the east coast of Grenada. 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 Woburn Clarke's Court Bay (WCCB), Molinere Beausejour and Sandy Island Oyster Bed (SIOB) MPAs. Each MPA site would receive a sub-grant of USD 2,500 to initiate monitoring.

She introduced her CERMES colleague, Ms. Katherine Blackman, CERMES Research Assistant and Assistant SocMon Trainer for the 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.

Mr. Johnson Louis, Chief Fisheries Officer (Ag.), gave opening remarks on behalf of Mr. Justin Rennie, Chief Fisheries Officer, who was unable to attend the workshop. He stated the MPA work being conducted in Grenada has been complementing the work of the Fisheries Division. He listed the MPAs in Grenada and stated that the WCCB MPA would soon be launched. Mr. Louis suggested that training in SocMon Caribbean should help organise activities and strengthen public education in the conservation of the area and also help with enhancing marine biodiversity and protecting biodiversity.

Mr. Louis stated that Grenada is known for their work on MPAs. He provided a brief overview of other recent and upcoming MPA activities including Reef Check surveys of the MPAs and the participation of MPA wardens and staff in training sessions in Colombia and St. Croix. He stated that the SocMon workshop included a number of persons with a wealth of experience.

Mr. Roland Baldeo, MPA Coordinator, expressed his hope that the participants of the workshop would learn a lot over the four-day session. Emphasis was placed on the work that has been conducted on MPAs in Grenada and also the many opportunities and funding mechanisms available. Mr. Baldeo stated that the sessions would be his first exposure to the SocMon methodology and everyone would be learning together.

Mr. Baldeo indicated that worldwide there has been talk about socio-economic monitoring and lots of work has been conducted in various regions. He expressed his anticipation for the results and benefits of the training to enhance Grenada's MPA programme. He

highlighted that later in the year, two MPAs will be launched: Grande Anse MPA and the WCCB.

Mr. Baldeo further noted that Grenada made a pledge to protect 25% of its coast by 2020. With only 100 months left to achieve this, a plan must be implemented. He also highlighted the Conservation Trust Fund which is expected to be implemented later in the year to allow funds to be available to run the MPA programme (including salaries for wardens etc.). He stated that support is needed to run such programmes as the Government cannot always be depended on as a source of support.

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 Grenada training workshop. 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 by Ms. Blackman to illustrate the application of SocMon Caribbean in Canaries, St. Lucia. Additionally, she showed participants one of the group presentations prepared at the recently concluded St. Lucia SocMon training workshop as an example of expectations for the Grenada training group.

A description of the workshop demonstration study site, the WCCB MPA; 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). Participants were urged to think of linkages of SocMon with other projects for the WCCB MPA to ensure beneficial and effective monitoring. Key points about the WCCB MPA added by participants included:

- The area is a bird sanctuary for the Grenada Dove; Woburn is an area important for birdwatching
- Sailing is an important activity in June/October
- Le Phare Bleu is a designated anchorage
- Hog Island is important for recreation daily and especially on Sundays
- Many villas in the area as well as Le Phare Bleu important for tourist accommodation
- Elite tourism - Calivigny Island (private resort)
- Small-scale agriculture occurs within the area, mainly small crops such as melons
- Boat building important within in the area
- Issues include garbage disposal; anchoring; pollution from the rum factory; too many yachts; lack of holding tanks on yachts; heavily impacted area from watershed at Richmond Hill; unlicensed water taxis in the area; landfill encroaching on the mangrove.
- Projects and research relevant to the area – management plan drafting; TNC At the Water's Edge (AWE) project using Woburn as the demonstration site; Woburn is also the demonstration site for the Caribbean Large Marine Ecosystem (CLME) project (focal activities being determined, funds approved for the project)

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 WCCB MPA for preliminary reconnaissance. The field trip was lead by Mr. Christopher Alleyne, Woburn Woodlands Development Organisation (WWDO).

No workshop activities were held on 7 February since it was Grenada's Independence Day. Due to numerous competing projects and accompanying workshops in Grenada, it was not possible to re-schedule the SocMon training workshop around this Public Holiday. Therefore the training had to be condensed into four days.

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 the final day 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). Each team presented their assessment findings. In the remaining time, Ms. Zaidy Khan, Project Manager and Technical Advisor of the CERMES implemented NOAA-funded *Adaptive Capacity for MPA governance in the eastern Caribbean* project, assisted Ms. Pena in guiding participants in a discussion and determination of focal points for site monitoring at their respective sites. SocMon team leaders for each MPA project site were also determined (Table 1). Participants were given two weeks to complete these proposals for submission to be reviewed by CERMES.

Table 1 SocMon focal points by MPA project site

MPA project site	SocMon focus	SocMon site leader
Woburn Clarke's Court Bay	Baseline socio-economic data exist but needs to be increased by: increasing sample size; including wider range of stakeholders; targeting management stakeholders	Shawnaly Pascal
Molinere-Beausejour	Assessment/monitoring to (1) capture community perceptions of MPA and management (MPA management effectiveness) and (2) baseline data collection.	Coddington Jeffrey
Sandy Island Oyster Bed	(1) Identification of trends and changes in fishing communities' perceptions and ownership. (2) Management effectiveness evaluation with focus on livelihood changes and 2006 baseline socio-economic data	Davon Baker

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, eleven of the twelve 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).
- They enjoyed participating in the workshop (Figure 6).

Figure 1: Workshop goal was fully achieved

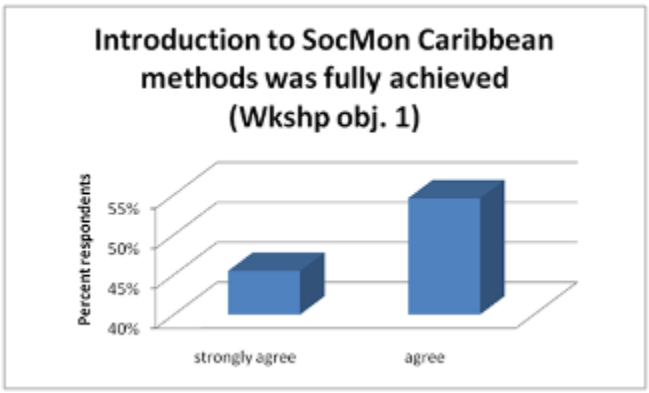


Figure 2: The first objective of the workshop was fully achieved

Figure 3: Workshop organisation

Figure 4: Workshop facilitation

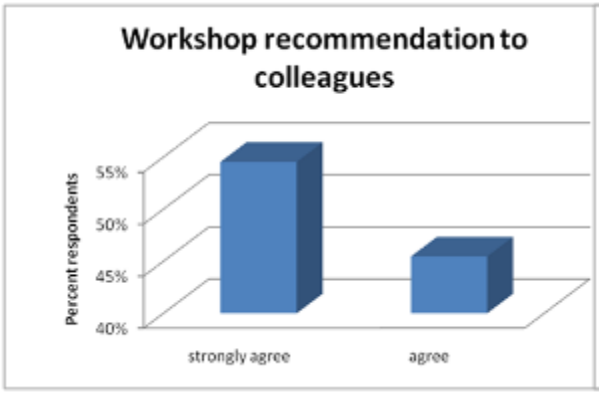


Figure 5: Workshop recommendation

Figure 6: Personal enjoyment of workshop

The majority of the workshop participants (91%) believed that the second workshop objective, preparations for development of a SocMon monitoring plan and timeline, was fully achieved. A small minority (9%) disagreed with this statement.

When asked about whether their personal expectations for attending the workshop had been fully achieved, and if their abilities as MPA professionals/stakeholders had been improved as a result of the workshop, 91% (in each case) either strongly agreed or agreed with these statements, with only 9% neither agreeing or disagreeing with them.

The majority of the participants (64%) identified things they liked the most about the workshop:

- The methodology for presentation, materials used and their quality.
- Openness, networking, sharing and simplicity.
- The field trip component of the training and willingness of facilitators to assist.
- The data collection and analysis components.

Seventy-three percent of workshop participants identified things they liked least about the workshop, approximately one-third which pertained to what participants felt was short workshop duration:

- The workshop pace.
- Short/rushed activities.
- It didn't have enough time allocated for this workshop.
- Time keeping of team members.
- The location of the workshop (commuting).
- Nothing.
- Everything was perfect.

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

Eighty-two percent of participants recommended the following changes to the workshop, the majority of which pertained to increasing the duration of the workshop and field visits.

One participant noted that nothing should be changed and two participants provided no response.

Eighty-two percent of the SocMon trainees provided additional thoughts, comments or suggestions about the workshop:

- Great and timely workshop.
- SocMon should be conducted every year and more funds provided for MPA developmet.
- More time for workshop surveys.
- Follow-up with participants via email.
- Always strive for ways to improve and enhance this methodology.
- Make drinking water available and provide access to printer for printing questionnaires.
- This workshop should be done in every MPA in the Caribbean to engage more interest among persons.

Two participants noted "nothing" and two more provided no response to this question.

APPENDICES

Appendix 1: Agenda

Caribbean Challenge SocMon Training Workshop
Grenada, 6-10 February 2012

PROGRAMME

Day and time	Activity
Sunday [5 February]	
Morning	Trainers arrive
Afternoon	Pre-workshop site reconnaissance (trainers)
	Meet with local organiser to finalise workshop preparations
	Carriacou participants check-in to Denya's Inn
Monday [6 February]	
8:30 – 9:00	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 [Woburn Clarke's Court Bay (WCCB)] with situation analysis; issues of concern; and review of available secondary data 2. Preparatory activities for WCCB field scoping in two teams
3:00 – 5:00	1st field trip to WCCB for field scoping and de-brief on site. ***Homework: Prepare 5-10 slides of interesting field scoping photos (per team)***
Tuesday [7 February]	**HAPPY INDEPENDENCE DAY!**
Wednesday [8 February]	
8:30 – 9:00	Slide show and discussion of WCCB 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
12:00 – 1:00	***LUNCH***
1:00 – 3:00	**Field Data Collection cont.** Group work: Review available secondary sources of data

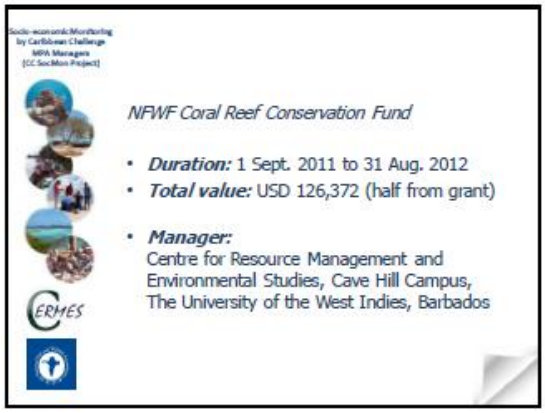
1

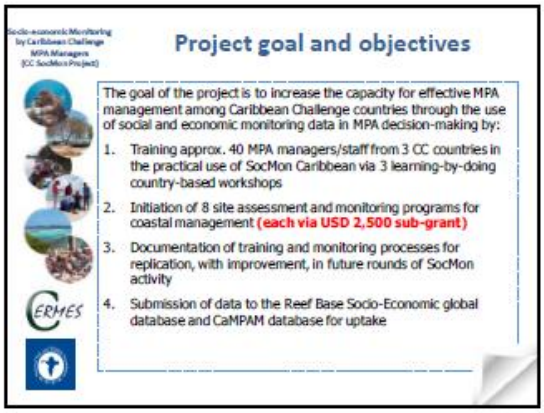
Day and time	Activity
	Formulate semi-structured interview guides for key informants
3:00 – 5:00	2nd field trip to study site for each team to implement work plan: key informant interviews, observation data, photos, transects etc. Team meetings on return to analyse data **Homework: Gap analysis**
Thursday [9 February]	
8:30 – 9:00	Review results and experiences of 2nd field trip in plenary
9:00 – 10:00	**Field Data Collection** Survey design: Survey structure and 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 – 2:30	Group work: Teams develop household interview survey, coding sheet and data table Pre-test survey in teams
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!**
Friday [10 February]	
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	Teams present SocMon findings (key informants and study site representatives invited to participate, validate) General discussion, key lessons learned by participants about SocMon
3:00 – 4:00	Group discussion of ideas for MPA SocMon site assessment and monitoring programmes Participants prepare monitoring plans for their MPA SocMon follow-up studies
4:00 – 5:00	Participants prepare monitoring plans for their MPA SocMon follow-up studies Final discussions, evaluation of workshop and wrap-up
After 5pm	Departures

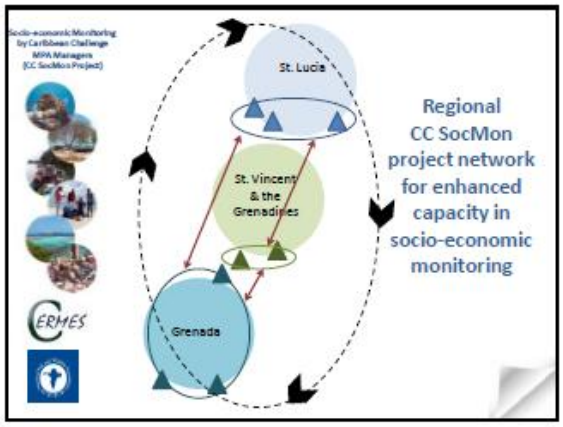
Appendix 2: Participants

Name	Position	Agency	Email
GDN participants			
Christopher Alleyne	AWE Leader	WWDO	crissalleyne@gmail.com
Davon Baker	Chairman	SIOBMPA	dkmbaker@gmail.com
Roland Baldeo	MPA Coordinator	Fisheries Division	rolandbaldeo@hotmail.com
Norland Cox	Agriculture Instructor	MOCAPA	nyoshacox@gmail.com
Finbar Gibbs	Director	NWDAI	nwdai@hotmail.com
Natasha Howard	Extension Officer	Min. Agriculture	n2000how@yahoo.com
Coddington Jeffrey	MPA Warden	MBMPA	cjcoral21@gmail.com
Shawnaly Pascal	Woburn community		shawnaly25@hotmail.com
Jody Placid	Warden	SIOBMPA	jp7_193@hotmail.com
Desmond Nicholas	Police Officer	RGPF	desmond1@hotmail.com
Anne Marie Taitt	MPA Warden	MBMPA	annmarietaitt07@hotmail.com
Brian Whyte	Secretary	SIOBMPA	brianwhyte@hotmail.com
CERMES staff			
Katherine Blackman	Research Assistant	CERMES	katherine.blackman@cavehill.uwi.edu
Maria Pena	Project Assistant	CERMES	maria.pena@cavehill.uwi.edu

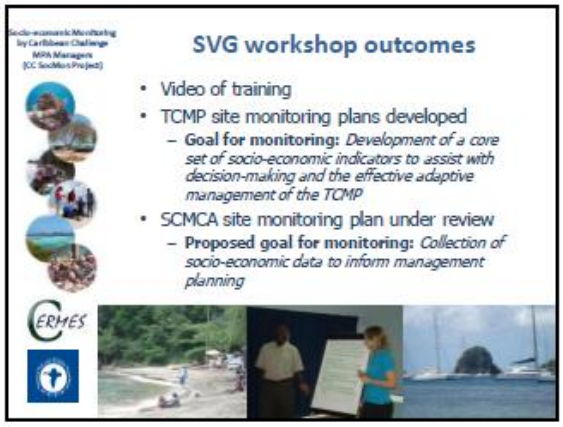
Appendix 3: Caribbean Challenge SocMon project overview





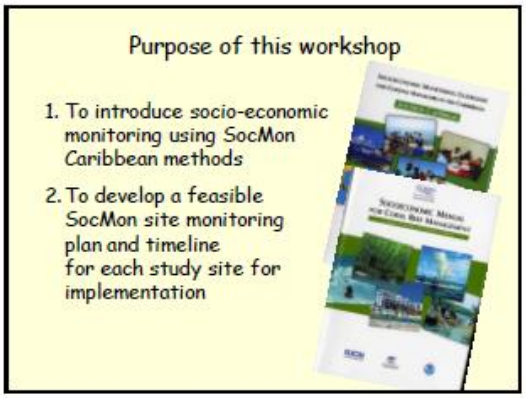

St. Lucia
St. Vincent & the Grenadines
Grenada
Regional CC SocMon project network for enhanced capacity in socio-economic monitoring

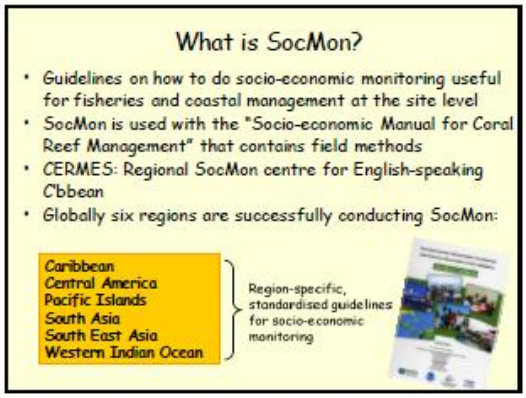
Workshop goal and objectives
Goal:
For MPA managers and field staff to learn how to develop and implement socio-economic monitoring programs for strategically selected sites using SocMon Caribbean methods
Objectives:
1. To introduce socio-economic monitoring using SocMon Caribbean methods
2. To develop a feasible SocMon site monitoring plan and timeline for each study site for implementation

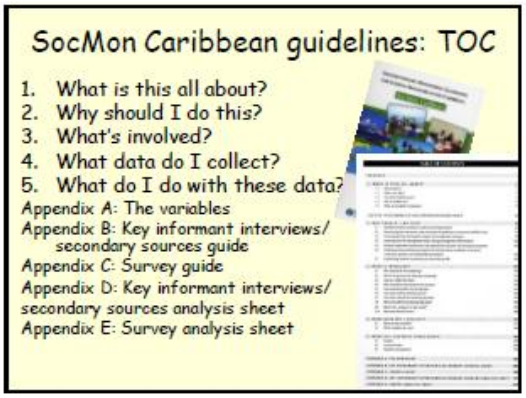

SVG workshop outcomes
• Video of training
• TCMP site monitoring plans developed
– Goal for monitoring: Development of a core set of socio-economic indicators to assist with decision-making and the effective adaptive management of the TCMP
• SCMCA site monitoring plan under review
– Proposed goal for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

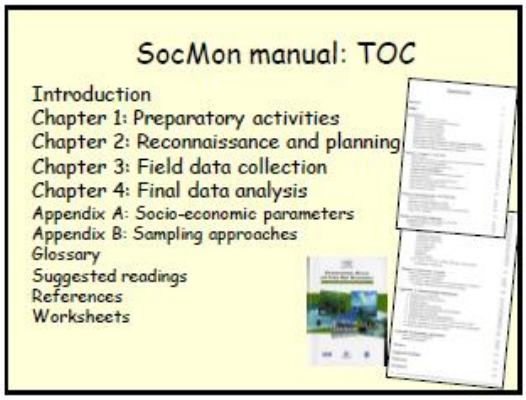
SLU workshop outcomes
• Video of training
• Draft site monitoring plans submission deadline: 15 February 2012
• PSEPA
• PMA
• SMMA

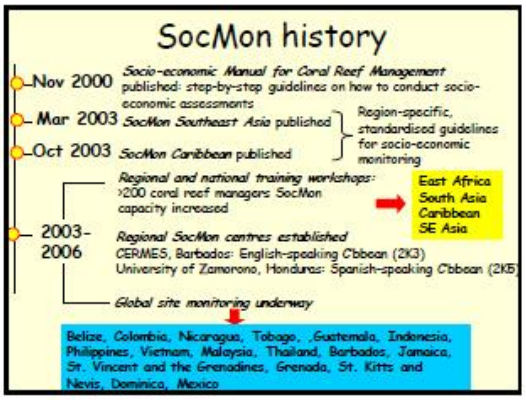
Appendix 4: SocMon training slides











Why do this? (The Benefits)

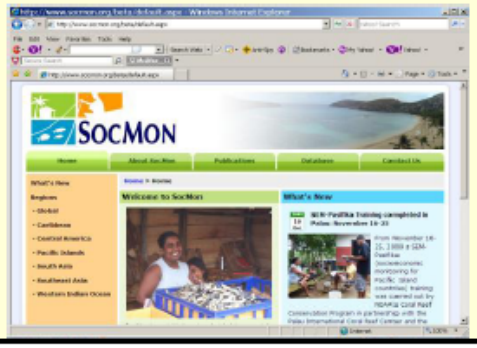
- SocMon can help us to understand the socio-economic contexts of coastal resource use by various stakeholders
- This is essential for assessing, predicting and managing coastal resource use over time
- National and regional fisheries, MPA and other management plans call for socio-economic data

Who is SocMon for?

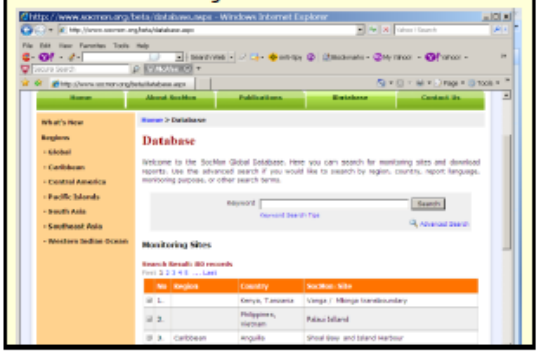
- Coastal managers (Govt. and NGOs)
- Resource user groups
- Community organisations
- Donors / technical assistance
- Academic and research institutions
- Environmental news media / public

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

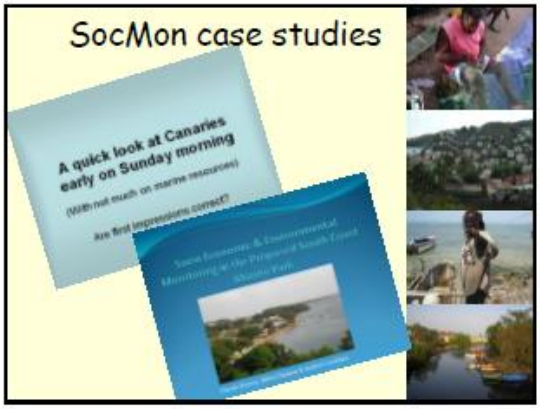
- 3 to 5-day workshop
- Approx. 20 participants
  - Wide stakeholder participation
- Introduction to SocMon Caribbean
  - Guidelines for monitoring
  - Survey and non-survey methods for data collection
  - Field trip to study area/monitoring site (field scoping)
- Planning for monitoring
  - Preparatory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

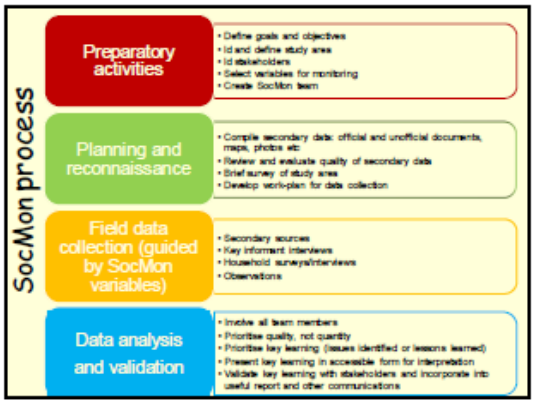
Longer workshops allow for sample data collection and analysis

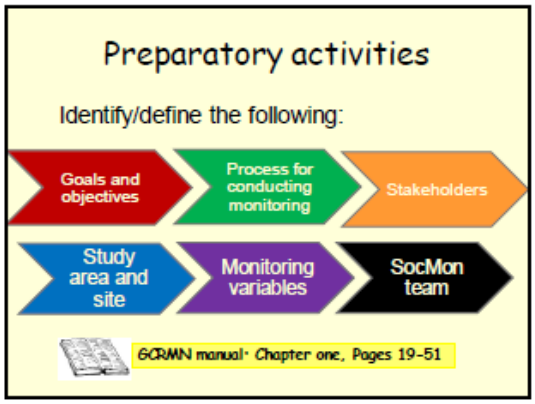
SocMon process

- **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







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
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  - Develop work-plan for data collection
- **Field data collection (guided by SocMon variables)**
  - Secondary sources
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  - 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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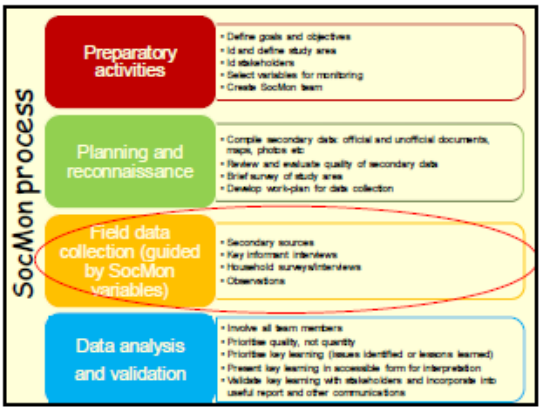
Planning field data collection: Work-plan

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



What Data Do I Collect ?

So many socioeconomic variables to choose from!

*See SocMon Caribbean Guidelines

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

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

What Data Do I Collect?
Coastal and Marine Activities

- K14. Activities
- K15. Goods and services
- K16. Types of use
- K17. Value of goods and services
- K18. Goods and services market orientation
- K19. Use patterns
- K20. Levels and types of impact
- K21. Level of use by outsiders
- K 22. Household use
- 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
- S2. Gender
- S3. Ethnicity
- S4. Education
- S5. Religion
- S6. Language
- S7. Occupation
- 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

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

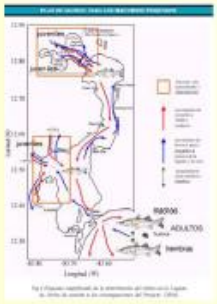
GCRMN manual · Chapter 3, Pages 92-148

Mapping, photos, (maybe GIS)

- Resource features
- Resource uses
- Infrastructure
- Areas of conflict
- Demographics
- Reference sites
- Boundaries, zones
- Etc., etc., etc.

44

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

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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 results /analysis tables

Occupation	PRIMARY		SECONDARY		Total percent of community members dependent on this occupation (primary and secondary)
	Number of household members listed as primary occupation	Percent household members that listed as primary occupation	Number listed as secondary occupation	Percent household members that listed each occupation as secondary	
Fishing	45	32.5%	50	22%	57.5%
Hotel development	50	23%	20	10%	35%
Aquaculture	30	15%	60	30%	45%
Hotel* (good manage farming)	5	2.5%	30	25%	27.5%
Nonoccupation**	50	25%	0	0%	25%
TOTAL	100	100%	100	40%	140%

* record together all occupations that were listed for <5% of the household members
** for example, unemployed, students, retired

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	60%	600	20%	10%
2. Hotel/sports operators	30%	300	0%	0%
3. Aquaculture workers	20%	200	5%	1%
4. Hotel workers	5%	50	0%	0%
5. Farmers	5%	50	30%	4%

SocMon Caribbean guidelines· Page 34

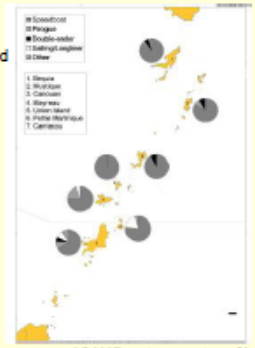
SocMon results /analysis tables

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

Coastal and Marine Activities	Coastal and Marine Goods and Services	Value of Goods and Services
Fisheries	Lobster	High
	Grouper	High
Tourism	Hotel	Medium
	Diving	Low
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

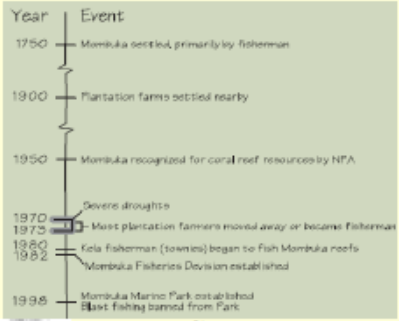
Chart organisational and institutional relationships

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	*Lambia lambia*		0	reef	spider
Clam (large, white, vertical ridges)	unknown		0	reef	kai
Clam (large, brown, cross ridges)	*Anadara spp*		+	mud	kai nalepa
Pearl oyster	*Pectada margaritifer*		0	sand / mud	vilavila iki
Limpet	*Collisella strata*		+	coral islands	kai rai
Sunset shell	*Asaphis violascens?*		+	beach / mud	kai wi
Small top shell	*Trochus maculatus*		0	reef edge	pere
Clam (tiny, gray, smooth)	unknown		0	sand beach, near rocks	sisa
Cone shell	unknown		0	reef	baskatua
Pen shell	*Pinna bicolour*		0	sand / mud	mangali
Clam	unknown		0	sand	vilavila

GCRMN manual· Chapter 3, Page 143

Timelines of key events



GCRMN manual· Chapter 3, Page 123

Historical mapping of changes

GCRMN manual· Chapter 3, Page 117

Historical transect matrix

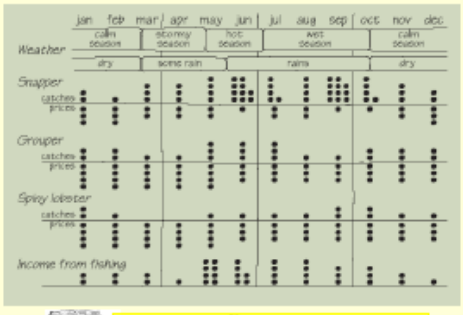
GCRMN manual· Chapter 3, Page 130

Ranking e.g. of impact factors

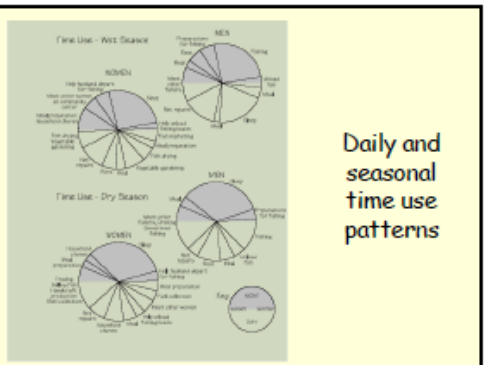
Reef Stakeholders	Number of people	% Men	% Women	% Children	Damage caused to reef
Traditional Fishers	75	95%	0%	5%	Least
Ex-Plantation Fishers	40	80%	0%	10%	Medium
Townie Fishers	65	75%	0%	25%	Highest
Women Gleaners	30	0%	60%	40%	Medium to Least

GCRMN manual· Chapter 3, Page 142

Seasonal calendar



GCRMN manual· Chapter 3, Page 127



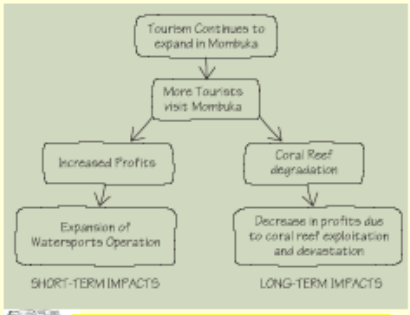
Daily and seasonal time use patterns

GCRMN manual· Chapter 3, Page 128

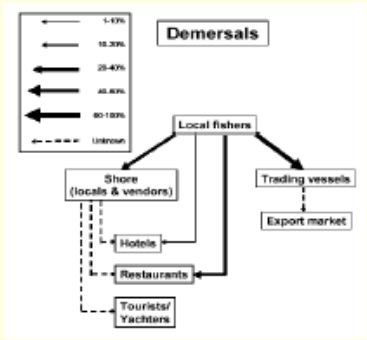
Venn diagram of resource uses and resource users

GCRMN manual· Chapter 3, Page 135

Flow charts of various types

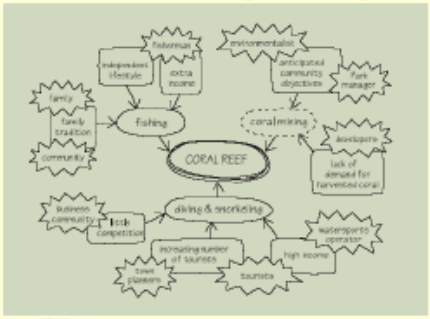


GCRMN manual· Chapter 3, Page 137



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

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

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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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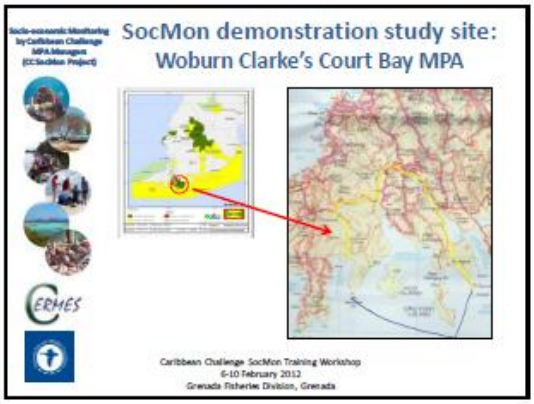
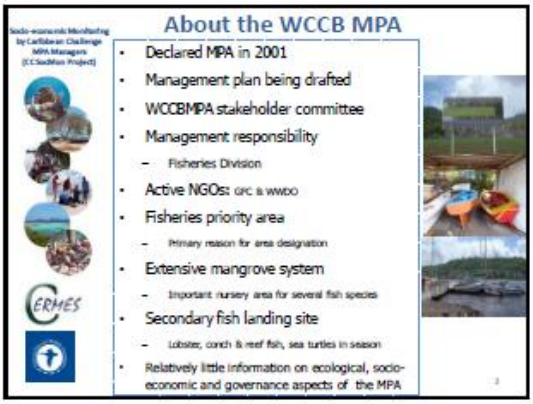
Thank You

CERMES

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

Appendix 5: Demonstration study site overview





Appendix 6: Key informant interview guides

Group 1

WCCB Key Informant Interview Guide

Community resident

1. What does the community use the area for?(K1,14,16)

Use	Location

2. What livelihood activities are people involved in the community? (K14)
3. What are the benefits / impacts on the Yachtees to the community? (K20)
4. How important is the fishing industry to the community?

Business owners/operators

1. How long have you been doing business in the area? (K12)
2. What is the general nature of your business? (K15)
3.
   a) Do the other resource users of the area affect your business in any way? (K20)
   b) If yes, how? (K20)
4. Are there areas within the WCCBMPA that are critical to your business? (K13)

Group 2

Key Informant Interview

Service Provider (Henri Safari), fisherman (Banga) and marina (Blanco)

1. What type of services do you provide to the yachts? (K 15 & 16)
2. What is the regularity of these types of services offered?(15 & 16)
3. Of these services offered, how would you rate them in terms of income generated?(K 17)

   Services High Medium Low $

4. What kind of relationship exists between your company and the yachting community?(K 20)
5. What are the general perceptions of the community to the yachting sector in the area? (K20)

Appendix 7: Household/individual surveys

Group 1

ID#...../.....Q#...../.....

Socio-economic monitoring by Fisheries Division individual for the Woburn Clarke's Court Bay Marine Protected Area (WCCBMPA).

This survey is being conducted as part of a training exercise by WCCBMPA to aid in the planning and development of the marine protected area. Any information given will not be traced back to you. Your identity will not be revealed.

1. Do you part take in any fishing activities ?
   Yes ( ) No ( )

   If yes, what species are caught?
   Reef fish ( )
   lobsters ( )
   conchs ( )
   tunas ( )
   kingfish ( )
   bonita ( )

2. What tourism services does the community provide? (Tick ALL that apply)

water taxi ( )
restaurant ( )
diving ( )
tour guiding ( )
sailing ( )
other ( )

3. On a scale of 1-5 how would you rate the conditions of your environment today as compared to the early 2000s?

•Very Good
•Good
•Neither good nor Bad
•Bad
•Very bad

Resources	Ten years ago	Today
Fish Catch		
Reefs		
Beaches		
Mangroves		

1

4. List three threats most commonly affecting the marine protected area? (in order of importance)

1.....
2.....
3.....

5. What do you think may be possible solutions to those threats?

1.....
2.....
3.....

6.

a) Have you been involved in the development of the Woburn Clarke's Court Bay Marine Protected Area (WCCB MPA)
Yes ( ) No ( )

b) If yes on a scale of 1-3 how would you rate your participation in the development of the Woburn Clarke's Court Bay Marine Protected Area (WCCBMPA)?

1- little participation ( )
2- some participation ( )
3- full Participation ( )

c) If no, why not? .....

7.

a) Do you think that certain areas within the marine protected area should be zoned for any particular use or reason ?
Yes ( ) No ( )

b) If yes, which of the following activities should be zoned and provide possible zoning location for each.

Uses	Location
Fishing	
Anchoring	
Diving	
Watersports	
Other	

ID#...../.....Q#...../.....

8. What is the size of your household ?

9. How old are you?

( )16-25 ( ) 26-35 ( ) 36-45 ( ) 46-55 ( ) over 55

10. Gender: ( ) Male ( ) Female

11. What is your household's main source of income?

12. What is your relationship to the head of the household?

Group 2

QUESTIONNAIRE ID# ___/___ Q# __/___

Socio-economic Monitoring (SocMon)

Individual and Household Survey for WCCBMPA

This Survey is being conducted as part of a SocMon training workshop facilitated by the University of the West Indies (UWI) so as to assist the current management in improving the management of the WCCBMPA. Any information you give cannot be traced back to you and you will not be identified in any reports.

Date _____ Area _____

yyyy – mm – dd

1. Gender [ ] Male [ ] Female (S 2)
2. What is your age range? (S 1)
   [ ] 15 – 25 [ ] 26 – 35[ ] 36 – 45[ ] 46 – 55[ ] 60 and over
3. What is your religion? (S 5)
   [ ] SDA
   [ ] Catholic
   [ ] Baptist
   [ ] Pentecostal
   [ ] Other
4. What is your highest level of education? (S 4)
   [ ] Primary
   [ ] Secondary
   [ ] Vocational
   [ ] University
   [ ] None
5. What is your main source of income? _____ (S 7)
6. Do you have any additional sources of income in the household? (S 9)
   _____
7. How many persons are there in your house hold? _____ (S 8)
8. Is there anyone in your household involved in these goods and services related to the yachting sector? (S 11)

1

[ ] Fishing
[ ] Restaurant & bar
[ ] Accommodation
[ ] Water taxi operator
[ ] Laundry
[ ] Boat cleaning
[ ] Other _____

B) Of these services, which generate the most income? _____ (S 11)

9. Estimate the range of income generated by this activity.
$200 - $ 400 weekly
$401 - $ 600 weekly
$601 – 800 weekly
$801 - $1000 weekly
$1,000 and over

10. How important is the yachting sector to your community? (S 14)
[ ] Very important
[ ] Important
[ ] Not so important
[ ] Not important

11. How would describe the current condition of the marine ecosystem in the area? (S 16)
[ ] Very good
[ ] Good
[ ] Not good/not bad
[ ] Bad
[ ] Very bad
[ ] Don't know

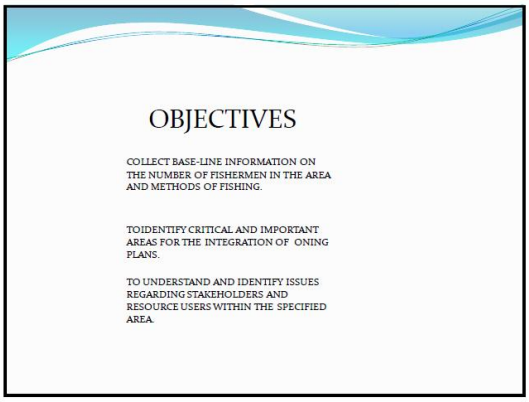
12. What do you think are the main threats to the coastal resources in the area? (tick ALL that apply) (S 17)
[ ] Sewerage
[ ] Commercial (factory)
[ ] Anchor damages
[ ] Other _____

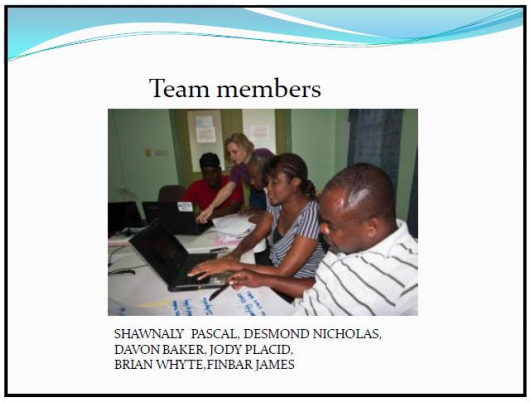
13. What do you think can be done about these identified threats?
_____
_____

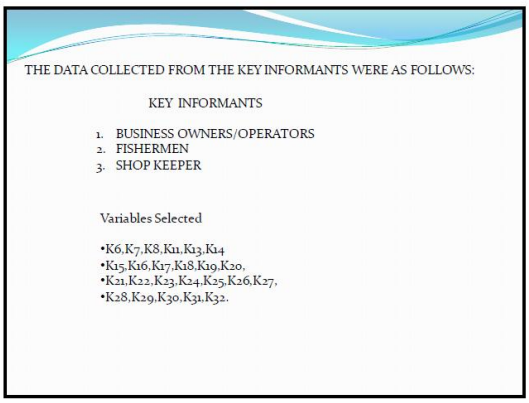
14. Are you a member of any community organization in the area? (S 22)
[ ] Yes [ ] No
15. If yes which is it? _____

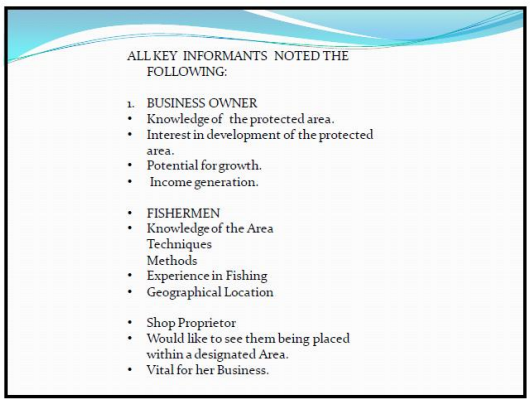
Appendix 8: Group presentation slides

Group 1









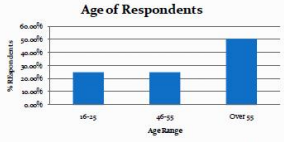
Participation in MPA Development

100% of the respondents interviewed in the area had no participation.

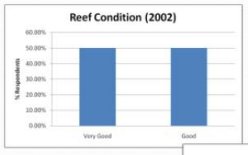
Zoning

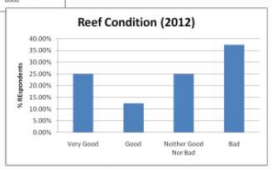
75% of the respondents interviewed in the area said the area should be soned for different uses.

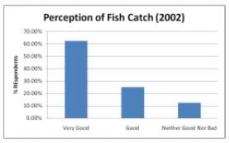
Population Demographics



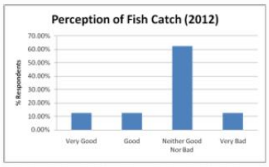
Condition of Marine Resources



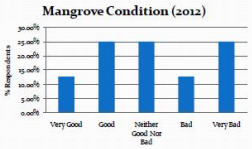


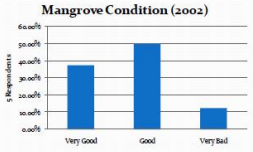


Perception of Fish Catch



Condition of Mangrove





Group 2

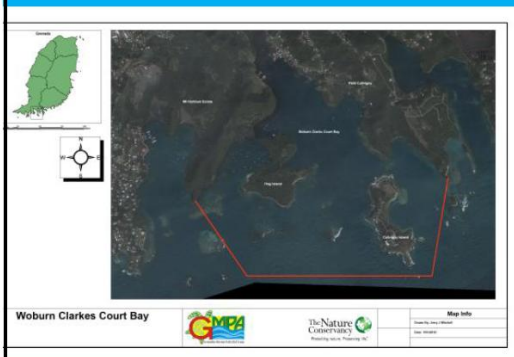
Socio-Economic Assessment Woburn Clarke's Court Bay

INTRODUCTION

- The WCCBMPA was designated as a protected area since 2001,for the protection of fishes and their breeding habitat.
- However the rich eco-system in mangroves, sea grass beds, coral reefs and bio-diversity the government made it fit to protect and conserve the entire area .
- The WCCBMPA is located on the south coast between Egmont Point and MtHartman Point ,which include Caliviny and Hog islands

Background

- To ensure that the WCCBMPA is effective, the Fisheries Division in collaboration with the Grenada Fund For Conservation and with the involvement of the community users of the WCCB including [local residents ,Fishermen, Mariners and private anchorage ,yachts at public anchorage, land development etc] are actively involve in the holistic develop of the MPA.



WCCB a mixture of local fishing and yachting Tourism

Small open sailing boats for participation in local regattas

Local restaurant may have been built in the 80's and with little activity

Local bar for recreation, and some indication of traditional gambling

Indication that fishing is done in deep waters, lambi (conch) harvesting

Tradition of fishing is sustained

Few houses, area not heavily populated

Conservation and mangrove restoration within the area

More modern a expensive homes and restaurant on the east side of park

Ongoing development on land, potential land degradation

More developed and cleaner on east side of park

GOAL

- To acquire socio-economic data to determine the impact of the yachting community ,for the Woburn Clarke's Court Bay Marine Protected Area to inform decision making.

OBJECTIVES

- To indentify the socio-economic benefits of the yachting sector in the community .
- To determine the impact of the yachting community on the WCCBMPA.
- To obtain stakeholders suggestion and recommendations to address issues and concern within the WCCBMPA.

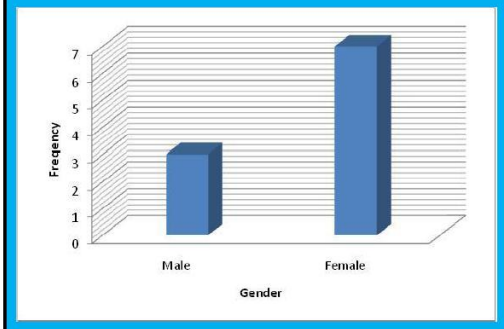
Methodology

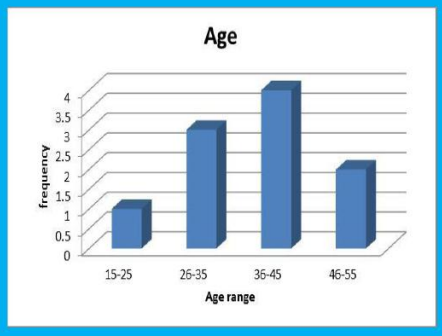
- Conducted key informant interviews – key stakeholders in the area.
- 10 household surveys – using random samples
- Analysis of data using Excel

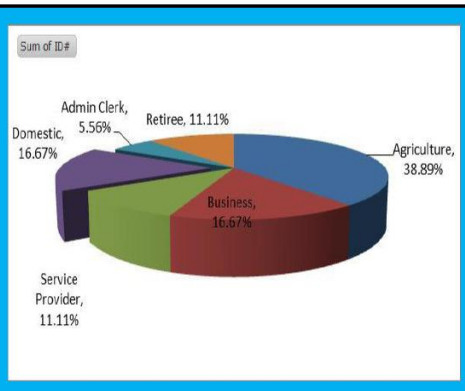
KEY INFORMANT

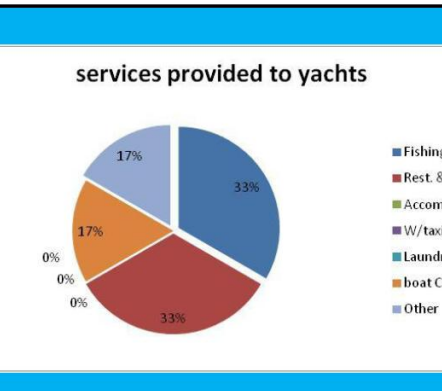
Key informant	Service provided	variable
Cletus Pascal	restaurant	K15,k17,k16,k20
Mr Philbert	fisherman	K15,k17,k16,k20
Mrs jean	marina	K15,k16,k17,k20

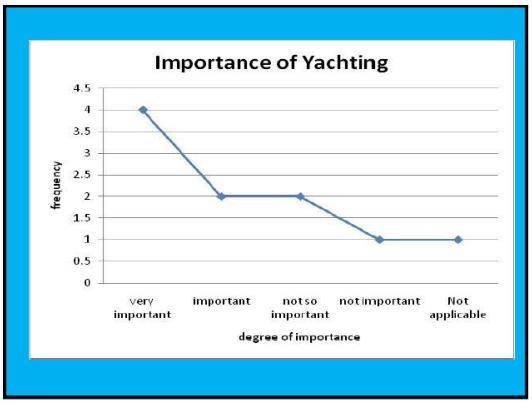
Question #	Marina	Fisherman	Restaurant Owner
Services	Docking, laundary,shower ,water/ice, internet	Shop owner	Restaurant, ice/water, accommodation, internet
Regularity	daily	daily	daily
Income	high	DK	Medium
Relationship	Very good	Very Good	Good
Perception	Very important	Pollution	Mixed

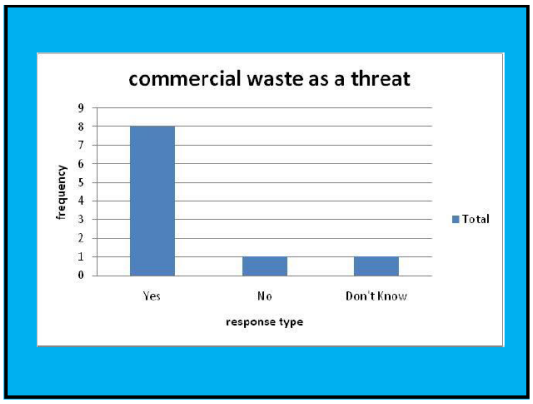


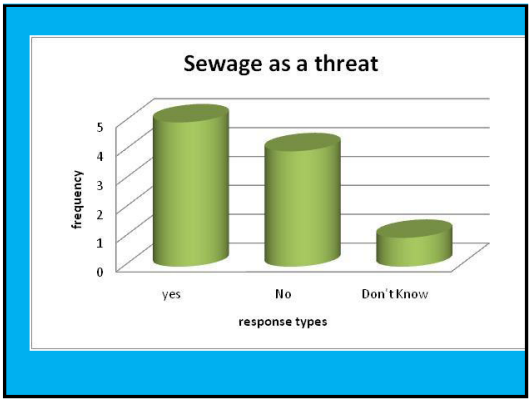


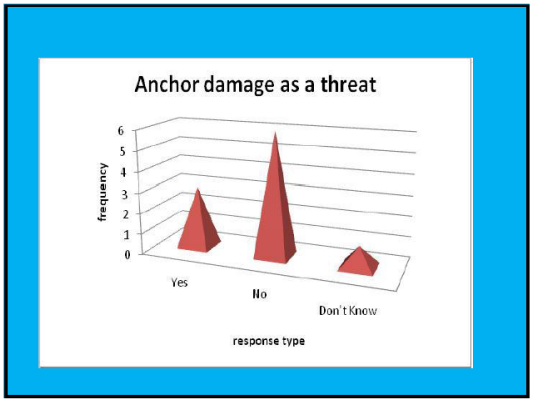


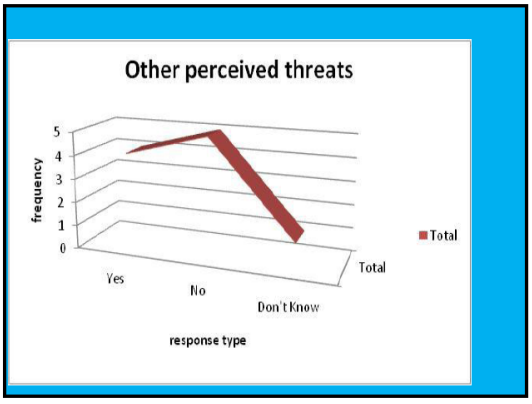






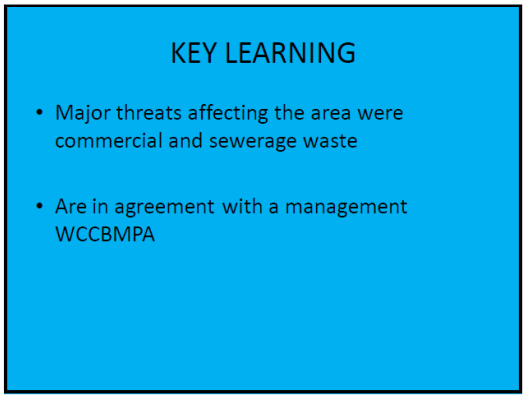






KEY LEARNING

- Yachting is very important to the community
- Services provided daily included laundry, internet, water, food and ice
- Most common types of services provided to yachts were fish, restaurant & Bar


KEY LEARNING
• Major threats affecting the area were commercial and sewerage waste
• Are in agreement with a management WCCBMPA

Appendix 9: Preparatory activities worksheets

Group 1

Socio-economic Monitoring by Caribbean Challenge MPA Managers (Caribbean Challenge SocMon)

6-10 February 2012, Grenada

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 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 access and collect baseline socio-economic information to inform policy and decision-making for the Woburn Clarke's Court Bay Marine Protected Area.	1. Collect baseline information on the number of fishermen in the area, the methods of fishing used and the areas in which it's done.
	2. To identify critical and important areas for integration in the zoning plans.
	3. To identify and understand issues regarding stakeholders and resource users within the specified area.

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)
Has the highest concentration of fishermen and yachters.	From the mangrove restoration site to the Woburn fish landing site (the Bay) lower Woburn Village.
The area would be critical for zoning.	
It has the highest concentration of human activity.	

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]
Anchoring	Yachters	Marinas
Recreation (sailing, Night Life)	Worburn Development Organisation	Island View's owner, restaurants and bars
Landing and vending	Fishers and venders	
Tourism	Water Taxis	Hotels, villas, marinas, restaurant's, sports etc.
Pollution	Yachters, community members	Sugar factory, community members

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
Fishermen	Woburn village	Mr. Nigel Mylan
Marina	Woburn village	Mr. George Blanko
Farmer	Woburn village	Mr. Harris Strachan
Business Owner	Woburn village	Mrs. Bernadette Nimrod

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
Has knowledge of the area	Shawnaly Pascal- resident
Good communication skills	tbd
Reliable and dependable	tbd
Positive Attitude	tbd
Basic computer skills	tbd

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					
Scoping visit to Woburn - Clarke's Court Bay	x				
Secondary data collection					
Photographs taken	x	x	x		
Identify and collect secondary sources of data		x			
Review secondary sources of data	x	x			
Primary data collection and observation					
Design key informant interview guide		x			
Conduct key informant interviews		x			
Design and pretest survey			x		
Data analysis and interpretation					
Survey coding & data entry				x	
Preparation of presentation				x	
Validation, communication, adaptation					
Presentation				x	

3

Activity / task Day →	1	2	3	4	5
Preparation of monitoring plans				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.

Key informant interview/secondary sources variables

Var. No.	Variable to monitor	Obj. 1, 2, 3…	Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork
K1.	Study area	1,2,3	
K2.	Population	1,3	
K3.	Number of households	1,3	
K 4.	Migration rate	1	
K5.	Age	1,3	

4

Key informant interview/secondary sources variables			
Var. No.	**Variable to monitor**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
K6.	Gender	1,3	
K7.	Education	1,3	
K8.	Literacy	1,3	
K9.	Ethnicity		
K10.	Religion		
K11.	Language	1,3	
K12.	Occupation	1,3	
K13.	Community infrastructure and business development	1,2,3	
K14.	Activities	1,2,3	
K15.	Goods and services	1,2,3	

5

Key informant interview/secondary sources variables			
Var. No.	**Variable to monitor**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
K16.	Types of use	1,2,3	
K17.	Value of goods and services	1,2,3	
K18.	Goods and services market orientation	1,2,3	
K19.	Use patterns	1,2,3	
K20.	Levels and types of impact	2,3	
K21.	Level of use by outsiders	2,3	
K22.	Household use	1,2,3	
K23.	Stakeholders	1,2,3	
K24.	Tourist profile	2,3	
K25.	Management body	1,2,3	
K26.	Management plan	1,2,3	

6

Key informant interview/secondary sources variables			
Var. No.	**Variable to monitor**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
K27.	Enabling legislation	1,2,3	
K28.	Management resources	1,2,3	
K29.	Formal tenure and rules	1	
K30.	Informal tenure and rules, customs and traditions	1,2,3	
K31.	Stakeholder participation	1,2,3	
K32.	Community and stakeholder organisations		
[New]			
[New]			

7

Survey variables			
Var. No.	**Variable to be monitored**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
S1.	Age	1,3	
S2.	Gender	1,3	
S3.	Ethnicity	1,3	
S4.	Education	1,3	
S5.	Religion	1	
S6.	Language		
S7.	Occupation	1,3	
S8.	Household size	1,3	
S9.	Household income	1,3	
S10.	Household activities	1,3	
S11.	Household goods and services	1,2,3	

8

Survey variables			
Var. No.	**Variable to be monitored**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
S12.	Types of household uses	1,2,3	
S13.	Household market orientation	1,2,3	
S14.	Household uses	1,3	
S15.	Non-market and non-use values	1,2,3	
S16.	Perceptions of resource conditions	1,2,3	
S17.	Perceived threats	1,2,3	
S18.	Awareness of rules and regulations	1,2,3	
S19.	Compliance	1,2,3	
S20.	Enforcement	1,2,3	
S21.	Participation in decision-making	1,2,3	
S22.	Membership in stakeholder organizations	1,2,3	

9

Survey variables			
Var. No.	**Variable to be monitored**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
S23.	Perceived coastal management problems	1,2,3	
S24.	Perceived coastal management community solutions	1,2,3	
S25.	Perceived community problems	1,2,3	
S26.	Successes in coastal management	1,2,3	
S27.	Challenges in coastal management	1,2,3	
S28.	Material style of life	1,2,3	

10

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 They were a wealth of local knowledge, pertinent to the MPA. Because they lived and worked in the area, they would not only be familiar with the resources, but would also be among the first to be affected.	Estimated number of households in study area and means of obtaining estimate Approx. 90
No. of informants: 3	Approx. sample size: 10
Selection process:	Sample selection method: Random

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.

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

11

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

12

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		
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

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 This being merely a demonstrative effort, it is not statistically representative of the population in the area.
2 Respondent fatigue was a factor, with several respondents complaining about having been subjected to repeat interviews.
3 Schedule timing is also key – many persons were at work and not available to be interviewed.

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

14

Group 2

Socio-economic Monitoring by Caribbean Challenge MPA Managers (Caribbean Challenge SocMon)

6-10 February 2012, Grenada

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 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)
1. To acquire socio-economic data to determine the impacts of the yachting community for the WCCBMPA to inform decision-making.	1. To identify the socio-economic benefits of the yachting sector in the community of the WCCBMPA.
	2. To determine the negative impacts of the yachting sector on livelihoods of persons in the adjacent communities of the WCCBMPA.
	3. To obtain stakeholders suggestions and recommendations to address issues and concerns related to the yachting sector within the WCCBMPA.

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)
Commonly used yacht anchorage	Within the seaward boundaries of the WCCBMPA and terrestrial boundaries from Woodlands Junction to The Cliff onto Lower Woburn.
Marinas	
Specific demarcated area in the community	

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]
Yachting	Fishermen, restaurant owners, service providers (waste disposals) mini-marts, marinas, yacht owners and operators	MAYAG, marinas, WCCBMPA stakeholder committee, Fisheries Division

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
Marina	Clarke's Court Bay	Blanco
Fisherman	Woburn	Philbert (Banga)
Restaurant	Woburn	Cletus Pascal

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
Team Leader	Chris Alleyne - WWDO
Data Analyst	Knorland Cox – Ministry of Agriculture
MPA Coordinator -	Roland Baldeo - Fisheries Division
Community liaison person	Natasha Howard – Community Representative
Economist	Ann-Marie Taitt -WCCBMPA
Social Scientist	CJ - WCCBMPA

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					
Site visit (Reconnaissance Survey)					
Project Launch					
Secondary data collection					
Collecting and compiling data					
Reviewing of data collected					
Primary data collection and observation					
Interview KI					
Designing questionnaires					
Conducting household surveys					
Data analysis and interpretation					
Data entry					
Data analysis					
Interpret and report data					
Validation, communication, adaptation					
Presentation of results to stakeholders					

Activity / task Day →	1	2	3	4	5

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.

Key informant interview/secondary sources variables			
Var. No.	**Variable to monitor**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
K1.	Study area	**1,2,3**	
K2.	Population	**1,2**	**Census data**
K3.	Number of households	**1,2,**	**Census data**
K 4.	Migration rate		
K5.	Age		**Field data**

Key informant interview/secondary sources variables			
Var. No.	**Variable to monitor**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
K6.	Gender		**Field data**
K7.	Education		
K8.	Literacy		
K9.	Ethnicity		
K10.	Religion		
K11.	Language		
K12.	Occupation		**Field work Data**
K13.	Community infrastructure and business development		
K14.	Activities		**Field work data**
K15.	Goods and services		**Field work data**
K16.	Types of use		**Field work data**

5

Key informant interview/secondary sources variables			
Var. No.	**Variable to monitor**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
K17.	Value of goods and services		**Field work data**
K18.	Goods and services market orientation		**Field work data**
K19.	Use patterns		
K20.	Levels and types of impact		
K21.	Level of use by outsiders		
K22.	Household use		
K23.	Stakeholders		
K24.	Tourist profile		
K25.	Management body		
K26.	Management plan		
K27.	Enabling legislation		

6

Key informant interview/secondary sources variables			
Var. No.	**Variable to monitor**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
K28.	Management resources		
K29.	Formal tenure and rules		
K30.	Informal tenure and rules, customs and traditions		
K31.	Stakeholder participation		
K32.	Community and stakeholder organisations		
[New]			
[New]			

7

Survey variables			
Var. No.	**Variable to be monitored**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
S1.	Age	All	
S2.	Gender	All	
S3.	Ethnicity		
S4.	Education	All	
S5.	Religion	All	
S6.	Language		
S7.	Occupation	All	
S8.	Household size	All	
S9.	Household income	All	
S10.	Household activities		
S11.	Household goods and services	all	

8

Survey variables			
Var. No.	**Variable to be monitored**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
S12.	Types of household uses		
S13.	Household market orientation		
S14.	Household uses	All	
S15.	Non-market and non-use values	All	
S16.	Perceptions of resource conditions	All	
S17.	Perceived threats	All	
S18.	Awareness of rules and regulations	All	
S19.	Compliance		
S20.	Enforcement		
S21.	Participation in decision-making		
S22.	Membership in stakeholder organizations	All	

9

Survey variables			
Var. No.	**Variable to be monitored**	**Obj. 1, 2, 3…**	**Secondary sources of information & practical considerations, constraints and challenges with secondary data sources and carrying out fieldwork**
S23.	Perceived coastal management problems	All	
S24.	Perceived coastal management community solutions	All	
S25.	Perceived community problems	All	
S26.	Successes in coastal management		
S27.	Challenges in coastal management		
S28.	Material style of life		

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 Yachting sector in the WCCBMPA	Estimated number of households in study area and means of obtaining estimate 150 (for the purpose of this w/shop)
No. of informants: 3	Approx. sample size:10 for purpose of w/shop
Selection process: They represented the different interests of relevance to yachting sector.	Sample selection method: Random (every 3rd household)

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.

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

11

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

12

10. Visualization techniques

The GCRMN manual describes several visualization 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		
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

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

1. Team member with competence in the use and application of data analysis software (e.g excel)
2. Analysis of the data collected in very time consuming, as such ample time must be allotted to complete this task properly.
3. Important to assess data carefully to avoid present incorrect information and recommendations.

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
Stakeholders	Flyers, leaflets, brooches, power point presentations	Public meetings, consultations	Presentation must be made simple to provide better understanding of information delivered
Policy makers	Executive summary	Formal meeting	Conducted in the availability of official
Researchers	Reports, brooches	Web posting, blogs, emails, conferences	Channeled through universities and research instutions

13. Any other notes (optional)

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Appendix 10: Workshop evaluation

Socio-economic Monitoring by Caribbean Challenge MPA Managers (Caribbean Challenge SocMon) Workshop Evaluation, 6-10 February 2012, Grenada Fisheries Division, Grenada

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 make preparations for development of 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 (preparations for 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

Page 1 of 3

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?