

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

Site monitoring plan for MPA follow-up study

1. Goal and objectives guiding socio-economic monitoring

Monitoring goal
To collect data to inform/guide strategies to mitigate the socio-economic impacts of planned development within the Pitons Management Area (PMA) and the Soufriere Marine Management Area (SMMA).

SMART objectives for socio-economic monitoring (please be as specific as possible)

Monitoring objectives (Specific, Measurable, Attainable, Realistic and Time-bound)
To determine perceived threats of planned development within the SMMA and PMA by residents and other users.
To determine the level and extent of use of the PMA and the SMMA by residents and other users.
To identify potential management solutions to address impacts identified.

2. Defining the study area

Study area selection criteria	Study area description (or attach area map)
Location of the PMA & SMMA and surrounding communities where users live	Select enumeration districts in Soufriere, Canaries and Choiseul

3. Stakeholder identification

Study area activity or issue	Primary stakeholder [and organisation]	Secondary stakeholder [and organisation]
Accommodation	Manager/Owner of large and small hotels	St. Lucia Hotel & Tourism Association, Development Control Authority
Water taxi	Boat boys, Soufriere Water Taxi Association, Soufriere Water Craft Association	St. Lucia Air & Sea Ports Authority
Day Charter sea tours	Owner/Manager of Catamaran and speed boat (ply-for-hire) companies	Watercraft Advisory Committee, Police Marine Unit

Study area activity or issue	Primary stakeholder [and organisation]	Secondary stakeholder [and organisation]
Fishing	Fishermen, Soufriere Fishermens Cooperative Society Ltd	Department of Fisheries
Private Land Owners	Residents	
Touristic Sites	Soufriere Regional Development Foundation, Gros Piton Tours, Zion Tours	Department of Forestry
Recreational Use	Residents	National Conservation Authority
Yachting	SMMA, Customs & Excise Department, Immigration	Ministry of Tourism
Businesses	Owners/Managers of local businesses	Chamber of Commerce, Financial Institutions

4. Stakeholder locations and key informants

Stakeholders (1° and 2°)	Location of stakeholder	Key informants for stakeholders
Hotels	Soufriere	Karolyn Troubetskoy (large hotel), Joan Alexander-Stowe (small hotels)
Water taxi	Soufriere	Bernard Saltibus, President of Soufriere Water Taxi Association Charles Richards, Soufriere Watercraft Association
Boat Boys	Soufriere	TBD
Fishermen	Soufriere	Julian Alexis, Manager of Soufriere Fishermen's Cooperative Society Ltd.
Land owners	Within the PMA	Julian Alexis
Yachting	Soufriere	Benedict Adjodha, Harmony Yacht Services
Touristic Sites	Soufriere	Malcolm Mathurin, Sulphur Springs Park Manager
Business	Soufriere	Lytton Lamontagne, Ti J's

5. SocMon team and tasks

Role on team (or skill requirement)	Specific tasks	Proposed team member name and affiliation
Project Management	Overall management responsibility to implement project	Nadia Cazaubon & Henix Joseph

Role on team (or skill requirement)	Specific tasks	Proposed team member name and affiliation
Statistician	Assist in development of survey instrument, analyze data, present findings	TBD
Planning Officer	?	TBD
Fisheries Officer	?	TBD (preferably one who attended the SocMon Training)
		Malcolm Mathurin

6. Work plan schedule

Activity / task	Time unit →	Wk1	Wk2	Wk3	Wk4	Wk5	Wk6	Wk7	Wk8
Preparatory activities									
Recon		<input checked="" type="checkbox"/>							
Secondary data collection									
Gather and review secondary data		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
Primary data collection and observation									
Key Informant interviews			<input checked="" type="checkbox"/>						
Focus Group Discussion				<input checked="" type="checkbox"/>					
Identify and train enumerators			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
Design household survey			<input checked="" type="checkbox"/>						
Pre-test survey			<input checked="" type="checkbox"/>						
Administer surveys				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Data analysis and interpretation									
Enter data						<input checked="" type="checkbox"/>			
Analyse Data							<input checked="" type="checkbox"/>		
Data Interpretation							<input checked="" type="checkbox"/>		
Draft Report							<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Validation, communication, adaptation									
Validation Workshop								<input checked="" type="checkbox"/>	
Finalise Report									<input checked="" type="checkbox"/>
Submit Project Report									<input checked="" type="checkbox"/>

7. Critical research resources required (budget and non-budget)

Resource description	Use of resource	Comments on availability
Camera	Reconnaissance	In-kind use from PMA and SMMA
Transportation	For traveling to study site	Budget
Stationery	For printing surveys, reports, etc.	Budget
Projector & Laptop	For presentations, report writing, etc.	Budget
Consultant	Professional services of a Statistician	Budget
Enumerators	Short term employment for community youth to administer survey	Budget

8. Budget

Description of expense	No. of units	Unit cost*	Total cost*
Preparatory activities			
Recon	1	100	100
Design Survey Instrument	1	400	400
Purchase necessary equipment	1	600	600
Secondary data collection			
Gather and review secondary data	1	in kind	
Primary data collection and observation			
Key Informant interviews	5	20	100
Focus Group Discussion	1	300	300
Identify and train enumerators	1	100	100
Administer surveys	150	4	600
Transportation	1	100	100
Data analysis and interpretation			
Enter data	2	100	200
Analyse Data	1	500	500
Data Interpretation	1	500	500
Draft Report	1	500	500
Validation, communication, adaptation			
Validation Workshop	1	200	200
Finalise Report	1	300	300

Description of expense	No. of units	Unit cost*	Total cost*
Submit Project Report			0
Contingency			500
Sum total of SocMon costs			5000

* = currency used [USD]

Budget explanatory notes (use if needed to explain calculations/estimations)

9. Key variables to be monitored

KEY INFORMANT INTERVIEW/SECONDARY SOURCES 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
K1.	Study area	1, 2	PMA and SMMA management plans
K2.	Population	2	
K3.	Number of households		
K 4.	Migration rate		
K5.	Age	2	Contact Central statistics Office
K6.	Gender	2	10-19 ,20-29 ,30-39 ,40-49 and 50+
K7.	Education		
K8.	Literacy		
K9.	Ethnicity		
K10.	Religion		
K11.	Language	2	

KEY INFORMANT INTERVIEW/SECONDARY SOURCES 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
K12.	Occupation	1&2	
K13.	Community infrastructure and business development	1&2	
K14.	Activities	1&2	
K15.	Goods and services	1&2	
K16.	Types of use	1&2	
K17.	Value of goods and services		
K18.	Goods and services market orientation	1&2	
K19.	Use patterns	1&2	
K20.	Levels and types of impact	1&2	
K21.	Level of use by outsiders	1&2	
K22.	Household use		

KEY INFORMANT INTERVIEW/SECONDARY SOURCES 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
K23.	Stakeholders	1&2	
K24.	Tourist profile		
K25.	Management body	3	
K26.	Management plan	3	
K27.	Enabling legislation	3	
K28.	Management resources	3	
K29.	Formal tenure and rules	3	
K30.	Informal tenure and rules, customs and traditions	ALL	
K31.	Stakeholder participation		
K32.	Community and stakeholder organisations		

KEY INFORMANT INTERVIEW/SECONDARY SOURCES 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
[New]			

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&2	
S2.	Gender	1&2	
S3.	Ethnicity		
S4.	Education	1&2	
S5.	Religion		
S6.	Language	1&2	
S7.	Occupation	1&2	
S8.	Household size		

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
S9.	Household income		
S10.	Household activities	1&2	
S11.	Household goods and services		
S12.	Types of household uses	1&2	
S13.	Household market orientation		
S14.	Household uses		
S15.	Non-market and non-use values	1&2	
S16.	Perceptions of resource conditions	1&2	
S17.	Perceived threats	1&2	
S18.	Awareness of rules and regulations	3	
S19.	Compliance		

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
S20.	Enforcement		
S21.	Participation in decision-making	3	
S22.	Membership in stakeholder organisations		
S23.	Perceived coastal management problems	1&3	
S24.	Perceived coastal management solutions	3	
S25.	Perceived community problems		
S26.	Success in coastal management	3	
S27.	Challenges in coastal management	1	
S28.	Material style of life		
[New]			

10. Interview sample design

a. Key informants	b. Households
Critical information areas Land Owners Water Based Tourism Operators Hotel Owners/Managers Residents Fishermen	Estimated number of households in study area and means of obtaining estimate Estimated greater than 20,000 for three communities. Will randomly select enumeration districts from each to sample
No. of informants: 5	Approx. sample size: 150
Selection process: ?	Sample selection method: ?

11. 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	1, 2	Identification of Study area and threats map use of area
Transects - 119		
Timelines - 121		
Seasonal calendars - 125	2	Determine seasonal use
Historical transects - 129	2	Timeline of hotel development
Decision trees - 131		
Venn diagrams - 133		
Flow charts – 136	3	Management structure
Ranking - 138	1	Threats ranking

12. Key points to consider in data analysis and interpretation

1 Literacy level of respondents
2 Willingness of respondents to answer, especially land owners
3 Availability of respondents and the completion of survey on time

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

Target audience	Communication product(s)	Communication pathway(s)	Practical matters
All participants & donors	Project Report	Email distribution	(obtain email addresses where available)
All participants	PowerPoint Presentation	Validation Workshop	Not everyone will be able to attend
All residents	Press Releases	Local radio station, National TV station	

14. Plans for sustaining monitoring over the next five years

1. Seek funding to develop a standard monitoring instrument that can be used to monitor changes with new developments within both Protected Areas.

15. Challenges of implementing a sustained monitoring program at your site

1. Lack of human and financial resources

16. Initiatives/projects that may impact on SocMon at the site and future use of SocMon for socio-economic monitoring

Initiative/project	Impact on SocMon study
SMMA MARGOV (small grants project) - restructuring of SMMA stakeholder committee	Positively resurfacing of old and new issues and their challenges

17. Informing MPA management and/or policy decisions in St. Lucia

SocMon is a very useful methodology that may be used for guiding management of coastal resources and informing policy decisions. List a few areas where SocMon may be used for such.

1 It can provide scientific data in aiding government in the planning process for the management of protected areas

18. Potential for adaptive management using SocMon

1 Implementation of management solutions to address impacts identified
2
3
4

19. Any additional notes (optional)
