

Socio-economic Monitoring by Caribbean Fishery Authorities

Preparatory activities worksheets used to plan monitoring

These worksheets are *guides* to organizing 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.

Goals and objectives, or questions, 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.

Goal (category)	Objective	Specific objective (if applicable)

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.

Study area activity or issue	Primary stakeholder [and organization]	Secondary stakeholder [and organization]

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

Identify study area

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)

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. What types of expertise do you need and where from?

Skill requirement / role on team	Proposed team member and affiliation

Methods and visual presentation

There are a variety of methods and visualization techniques used to collect and communicate socio-economic data on stakeholders. Many methods may be used simultaneously or sequentially. The means of presenting socio-economic monitoring results is critical in showing relationships among the data.

Objective / Specific objective	Method of data collection	Means of visual presentation

Critical research resources required (budget and non-budget)

Many resources will be used in the research, but there are usually just a few that are so critical the assessment may not be able to proceed without them. You must know early what these are.

Resource description	Use of resource	Comments on availability

Budget

The SocMon methodology is intended to be affordable so that monitoring can be sustained. Pay close attention to what are realistic costs, including in-kind contributions that may be available.

Description of expense	No. of units	Unit cost*	Total cost*
Sum total of SocMon costs			

* = currency used []

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

Key variables in this study for interviews

Based on the goal and purposes of the monitoring you need to determine which (if not all) of the variables need to be measured, sources of secondary information to consult before interviewing (key informant or household) and practical considerations, including their level of importance.

Var. No.	Variable to be monitored	Secondary sources of information & comments on factors to be taken into account when monitoring	Importance of var. (H, M, L)
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		

Var. No.	Variable to be monitored	Secondary sources of information & comments on factors to be taken into account when monitoring	Importance of var. (H, M, L)
S12.	Types of household uses		
S13.	Household market orientation		
S14.	Household uses		
S15.	Non-market and non-use values		
S16.	Perceptions of resource conditions		
S17.	Perceived threats		
S18.	Awareness of rules and regulations		
S19.	Compliance		
S20.	Enforcement		
S21.	Participation in decision-making		
S22.	Membership in stakeholder organizations		
S23.	Perceived coastal management problems		

Var. No.	Variable to be monitored	Secondary sources of information & comments on factors to be taken into account when monitoring	Importance of var. (H, M, L)
S24.	Perceived coastal management community solutions		
S25.	Perceived community problems		
S26.	Successes in coastal management		
S27.	Challenges in coastal management		
S28.	Material style of life		

Draft interview questions

There are many ways of asking the same question (content) and many types of question layout (structure). Rules apply. Select variables in your study and draft questions to get information from respondents. Demonstrate that you can craft questions well using a variety of layouts.

Var. No.	Question (key informant or survey)

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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.

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2
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Issues in arrangements for communication and validation

Communication and validation of results and key learning is often done in workshops, but other means are possible. However done, there will always be some practical matters to address.

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Any other comments (optional)