Socio-economic Monitoring by Caribbean Fishery Authorities

Final Technical Report

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Disclaimer

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1 INTRODUCTION

National and regional fisheries authorities in the Caribbean Community (CARICOM) region have long asked for more attention to be paid to socio-economics in data collection, information generation and decision-making. Although efforts have been made by the Caribbean Regional Fisheries Mechanism (CRFM) to expand data collection systems to include social and economic data, little progress has been made by fisheries authorities towards implementation. The national and regional fisheries management plans being developed and implemented call for socio-economic data. The regional need for socio-economic monitoring and information will increase with the CARICOM Single Market and Economy (CSME) and the proposed Common Fisheries Policy and Regime (CFPR).

In response, the Centre for Resource Management and Environmental Studies (CERMES), at the University of the West Indies, Cave Hill Campus, as the Socio-economic Monitoring (SocMon) coordinating centre for the English-speaking Caribbean began to implement a project planned for 18-months, (October 2007 to March 2009) to increase and improve the use of site-specific socio-economic information in fisheries and coastal management decision-making by fisheries stakeholders in five selected CRFM member countries - Barbados, Dominica, Nevis, Grenada and St. Vincent and the Grenadines (Figure 1). The project had two no-cost extensions to December 2009 and then June 2010, respectively. It was funded by an International Coral Reef Conservation Grant from the National Oceanic and Atmospheric Administration (NOAA), US Department of Commerce (see the proposal in Appendix 1).

Figure 1 Study site locations
(Source: www.caribbean-on-line.com)
The purpose of this final technical report is to bring closure to the project by briefly summarizing what was attempted, what was achieved, some of the challenges and what lessons were learned. These topics are all addressed in greater detail in the site monitoring reports and other products created as outputs throughout implementation. This final report and the entire series of project site reports are available from the CERMES web site (www.cavehill.uwi.edu/cermes).

2 GOALS AND OBJECTIVES

The goal of this project was to increase and improve the use of socio-economic information in inshore fisheries and coastal management decision-making by training at least 50 fisheries management stakeholders, in five countries - Barbados, Dominica, Nevis, Grenada and St. Vincent and the Grenadines - in the use of SocMon Caribbean methods.

The project had four main objectives (Appendix 1; Pena and McConney 2008a):

1. Five in-country practically-oriented 3-day training workshops in SocMon Caribbean methodology (see the locations listed earlier)
2. Initiation of five site monitoring programs for fisheries-related coastal management in the five selected CRFM member states that received the training
3. Documentation of training and monitoring initiation processes to aid replication, with improvement in future rounds of SocMon activity
4. Submission of compatible data to the Reef Base Socio-Economic global database to ensure data sharing.

The project aimed to contribute towards building capacity among all fisheries stakeholders in socio-economic monitoring in the Caribbean.

3 METHODS

3.1 Applications for training, site selection and project announcement

In October 2007, CARICOM countries were invited to apply for SocMon Caribbean training immediately upon project start. This process also solicited project partners. Applications sought to determine fishery authority interest in participating in the project, experience with coastal monitoring, proposed study sites and preferred training dates. The project was announced across the region by email distribution of a two-page promotional project flyer to all fishery authorities in the eastern Caribbean and by the SocMon regional coordinator at a CRFM meeting (Pena and McConney 2008a).

3.2 Workshop preparation: Site preparation and local workshop organisation

Participating fishery authorities, selected as site monitoring leaders at all sites, were given ownership of the project at this stage of preparation for in-country three-day training workshops. CERMES provided all sites with a draft generic workshop agenda. Workshop training dates, local workshop organisers and SocMon lead individual contacts were confirmed and identified for all sites. Each of the participating countries was provided with an inception training workshop budget template to be completed by each local organiser. On completion of these budgets, workshops organisers were asked to submit them to CERMES for processing and disbursement of funds for further site-specific logistical preparations. The aim was to further contribute to ownership by the five partner fisheries authorities.
Selection of stakeholders to receive SocMon training was left entirely up to the discretion of the fishery authorities within some general guidelines. CERMES advised the fishery authorities to seek out wide stakeholder involvement in the project and to select no more than 20 participants per site. Once the selection process was completed, workshop organisers distributed the draft workshop agenda, outline and project announcement provided by CERMES to workshop participants.

Each fishery authority provided a preliminary site description of the study area chosen for implementation of socio-economic monitoring (as noted in the application for training). This site-specific information was incorporated into the training workshop presentations (Pena and McConney 2008a).

3.3 Workshop preparation: Training material preparation

Slide presentations providing an overview of this project and detailed training information on SocMon Caribbean methodology were prepared. An add-on SocMon related session, comprising about three hours of presentation and practical, on either economic valuation, livelihoods analysis, co-management or MPA management effectiveness was included in the 3-day training workshops to add value to the site monitoring programs in each of the five selected locations by providing training in a specialisation of relevance to each monitoring site. Fishery authorities were provided with a flyer describing the specialisation modules and were asked to submit an accompanying form outlining the specialisation module of interest to their site (Pena and McConney 2008a). Workshop packages were prepared for participants at each site comprising, *inter alia*, the workshop outline and agenda; electronic copies of primary course books; handouts of the generic SocMon slide show, survey question examples, coding and data tables; SocMon case studies; and preparatory activities worksheets.

CERMES encouraged workshop organisers to supply secondary sources of data (such as maps, planning documents, research documents of interest to the area, censuses etc.) relevant to study areas for use during the workshop.

3.4 Training workshops

Five in-country, practically oriented three-day SocMon methodology training workshops were held at the sites during the period May – June 2008 (CERMES 2008a). The project manager and investigator delivered the training. The investigator was assisted by Ms. Katherine Blackman, CERMES research assistant, for Dominica and St. Vincent training workshops. Daily workshop training components are shown in Table 1. At the end of Day 2 of the workshop, participants were asked to nominate persons from among themselves to comprise a SocMon team of about seven. These persons were to be involved in the SocMon assessment for their study area. Five site-specific training workshop reports were completed in June and circulated to all workshop participants by email and mail (Pena 2008a – e).

3.5 Site monitoring

Site monitoring comprised mainly sub-grant disbursement, site assessment planning meetings, questionnaire design, and fieldwork. On conclusion of the training workshops, 40% (US$ 1,000) of US$ 2,500 small grant funds were disbursed during the period July to September 2008 to the relevant organizations responsible for financial administration of the project in each of five SocMon sites for implementation of the site monitoring plan (CERMES 2008a). Disbursement of
remaining grant funds was only made to project sites once good progress was made with establishing site-specific monitoring programs (CERMES 2008a and b).

SocMon teams in St. Vincent, Dominica and Barbados held site assessment planning meetings during the period July to September 2008 (CERMES 2008a). Draft SocMon questionnaires were submitted by SocMon teams for review by the project manager and investigator from August to October 2008, in December 2008 and March 2009. Technical advice on drafting questionnaires was provided by CERMES with documents and handouts produced and distributed to SocMon teams to guide sites through the process of survey design (CERMES 2008a and b; Pena and McConney 2008b). The fieldwork component of site monitoring occurred during the period September 2008 to December 2009 according to site (CERMES 2008a-c).

3.6 Site monitoring reports

Each site was required to submit a final monitoring report on conclusion of monitoring. Reports were submitted to the project manager and investigator for review (CERMES 2008b-d).

3.7 Information sharing

A Yahoo e-group comprising SocMon workshop participants from all five sites was created on completion of the training component of the project. All five workshop training reports were shared among all sites to keep each site informed of proposed monitoring activities in other sites. Web pages to support the project were prepared and were continuously updated throughout the duration of the project for the CERMES web site.

3.8 Validation meetings

All sites were encouraged to provide feedback to stakeholders and all other persons who took part in the SocMon site projects through validation meetings. Validation occurred after the data analysis phase and before final report production.

3.9 Project evaluation

Fisheries SocMon teams were asked to complete an evaluation survey of their experiences with the Fisheries SocMon project (Appendix 2). Surveys were emailed to SocMon team members for completion once final site monitoring reports were submitted.

4 RESULTS

4.1 Applications for training, site selection and project announcement

Completed applications for SocMon training were submitted by four authorities - Dominica, Grenada, Barbados and Nevis - within the first month of application request (November 2007). The St. Vincent and the Grenadines Fisheries Division submitted its application in February 2008. The five participating fishery authorities and the CRFM Secretariat were fully incorporated into the project in the first week of February 2008 (Pena and McConney 2008a). Participants responded well to the detailed information requests in most cases, and this allowed the CERMES team to design the next stages efficiently.
4.2 Workshop preparation: Site preparation and local workshop organisation

In-country workshop organisation and support was commendable. The provision by CERMES of the draft workshop agenda, budget template and advice was effective in acquiring timely responses from each project site during the planning process. Email communication during this stage was also effective although phone conversations with SocMon workshop organisers were necessary at times for confirmation of details.

Workshop organisers satisfactorily identified workshop participants for a wide cross-section of stakeholder involvement in training. Stakeholder representatives from government departments and NGO organisations, educational institutions, stakeholder organisations such as fisheries cooperatives, and key residents participated in the training workshops.

4.3 Training workshops and their evaluation

The five in-country SocMon training workshops were successfully conducted with 89 fisheries stakeholders trained in SocMon methodology surpassing the project objective of training aimed at 50 fisheries management stakeholders (CERMES 2008a).

The study area field trip and SocMon preparatory activities worksheets components of training were particularly useful to participants. The field trip allowed participants to view the study area from a socio-economic perspective providing them with the opportunity to identify social, economic, environmental, cultural and political issues relevant to the area. This was particularly useful for workshop participants who were not very familiar with the study area of interest as was the case in Grenada (the study area here extends across nine settlements).

The thorough SocMon preparatory activities worksheets demonstrated the necessary components and information required for the development of monitoring plans for each study area. Such information included – goals and objectives for monitoring; stakeholder identification based on the relevant study area activity or issue of relevance; locations of these stakeholders and key informants; identification of the SocMon leader and team for site monitoring; methods of data collection and means of visually presenting the data according to monitoring objectives; 2-month work plan schedule; critical research resources required; monitoring budget based on US$2,500 grant; and key survey variables and identification of relevant secondary sources of information chosen according to the monitoring objectives to be focused on in questionnaires. Participants were better able to understand the process of socio-monitoring with these hands-on exercises and made comments to the effect to the trainers.

In general workshop training was well received by participants at all project sites. The workshop evaluation survey provided at the end of each workshop was completed by the majority of workshop participants. The majority of participants at each site either “strongly agreed” or “agreed” that:

- The workshop goal and objectives had been achieved.
- The livelihoods analysis specialization module added value to the workshop.
- Their expectations for attending the workshop had been exceeded.
- The workshop was well organized and facilitated.
- They would recommend a similar workshop to their colleagues.
- Their abilities as a fisheries management professional or stakeholder had been improved as a result of the workshop.
• They enjoyed participating in the workshop – all participants noted they enjoyed the workshop (Pena 2008a-e).

Across all sites, participant responses regarding things most liked about the workshop included:
• The participatory process through group discussions and interactive sessions between participants and facilitators.
• The new contacts and networks developed during the workshop.
• Well-balanced nature of the workshop – the relevant stakeholders were chosen to attend and the facilitators were knowledgeable about SocMon
• Information materials provided for training
• The field trip and practical exercises (Pena 2008a-e)

Things least liked about the workshops included:
• The terms used. It was suggested that more user friendly, less specialized, terms should be used.
• The quantity of material distributed. Some noted that there was lot of material to absorb in a short time period.
• The lack of involvement/limited participation of some participants in practical exercises.
• The absence of who some participants thought should be key stakeholders.
• The short duration and rushed nature of the field trips.
• The short duration of the workshop overall.

Recommended changes to the workshops included:
• The provision of examples of SocMon studies and material relevant to the purpose of SocMon in order to provide participants with a background to SocMon prior to the workshop.
• Finding ways to improve equal participation by all workshop participants with special emphasis on those who are least familiar with SocMon.
• Spending more time working through the preparatory activities worksheet with particular emphasis on question design and including stakeholders in monitoring.
• Increasing the workshop duration providing more time to plan monitoring activities.
• The preparation of the draft questionnaire to be used for pre-testing during the workshop.
• Participation of more diverse stakeholders.
• Selection of the SocMon team earlier in the workshop so that workshop activities could be focused on the actual monitoring to be undertaken.
• Making available relevant secondary data on the study site during the workshop. It should be noted here that workshop organizers were requested by CERMES to have secondary data relevant to the site available for use in the workshop. This was the case in some workshops where maps of the study area were provided. However, census data, research previously conducted in the study areas etc. had not been provided (Pena 2008a-e)

Five site-specific training workshop reports were completed in June and circulated to all workshop participants by email and airmail. The reports are available on the CERMES web site.

4.4 Site monitoring

Progress towards initiating site monitoring was reasonable overall but the field work component was delayed considerably in Barbados, Grenada and Nevis in spite of follow-up from CERMES
after training had concluded. Despite encouragement from CERMES for fieldwork to be completed by December 2008, only two sites, St. Vincent and Dominica, managed to achieve this deadline. Fieldwork was delayed considerably in Grenada, Nevis and Barbados with completion occurring only during mid to late 2009.

Reasons for delays in holding meetings for planning site assessments and slow project progress in Grenada and Nevis included government elections, public and individual holidays, office relocations and prior commitments of partners in these sites.

The project manager and investigator had to make site visits to Nevis in October 2009 to assist the team with data entry and analysis. Grenada requested hands-on assistance in data entry, analysis and reporting in February 2010. Both were mainly due to attrition of SocMon teams.

Generally, all of the sites encountered some problems with designing questions relevant to their monitoring objectives. The tendency is for questionnaires to be too long and exhaustive with the inclusion of irrelevant questions although this issue had been addressed during training and follow-up advice. CERMES continues to provide technical advice in this respect and produced two documents specifically to guide SocMon teams through the design process. These documents are a compilation of questionnaires used in previous SocMon projects to provide examples of typical questions used in assessment and monitoring surveys, and a one-page survey instrument design handout.

4.5 Site final reporting

Although Dominica and St. Vincent teams finished on schedule, this proved to be the most difficult part of the project for three of the sites (Grenada, Barbados and Nevis). Very lengthy delays were experienced with submission of reports, regardless of numerous contacts made by the project manager and investigator via email and phone calls with team leaders regarding the urgency of submission. In each of these three cases, the SocMon team had fallen apart, putting the entire burden upon one or two people. In the end, however, the fisheries authorities all produced reasonable to high-quality monitoring outputs as listed in the references and outputs.

4.6 Project outcomes and products

Throughout its implementation the project reported on achieving its intended outcomes and products (Appendix 1). All outcomes and products were met with only a few deficiencies and delays as reported elsewhere in the results and below in the conclusions.

4.7 Information sharing

Project information was shared among all five sites and will be added to the Reef Base Socio-Economic global database. The Yahoo e-group was not successful in promoting site to site information exchange. Instead individual SocMon teams seemed to prefer to directly communicate with the project investigator and manager. Therefore in the interest of timely execution of the project, the project investigator resorted to group emailing SocMon teams. In general, feedback from project sites, with the exception of St. Vincent and Dominica, was much more limited than expected. The ability to respond, and sometimes take action, depended upon the fisheries authorities’ level of attention to other matters.

Validation meetings were held at each site after the primary data collected were analysed. These meetings were held in the communities in which the monitoring was conducted to gain feedback
on the results obtained. Participant attendance was fairly high with an average of 15 persons attending. Data collection was accurate as participants agreed with the information collected.

The Fisheries SocMon webpage on the CERMES website (http://cavehill.uwi.edu.bb/cermes) has been updated with relevant project information including training materials, site-specific workshop training reports and site photos.

Information on the Fisheries SocMon project was presented in poster format at two successive (2008 and 2009) Gulf and Caribbean Fisheries Institute (GCFI) conferences (Pena et al. 2008; 2009).

Compatible data was, and will be, submitted to the Reef Base Socio-Economic global database at www.socmon.org.

4.8 Evaluation of the overall project

The usual difficulties in communication were encountered with the distributed questionnaire, and therefore this overall project evaluation is mainly the cumulative informal feedback received after the inception workshops, from the fieldwork to the final report stage, including sentiments expressed at the validation meetings. In summary, there was no overall negative feedback on the project process or products. All participants who expressed a view thought the experiences and the outputs were useful. However, many indicated that more support from their SocMon team and CERMES would have been beneficial. The former mainly concerned sharing responsibility and the latter concerned additional technical support in specific areas such as data analysis. Few could say whether sustained monitoring would be an eventual outcome of the project.

5 CONCLUSION

Careful preparation and the cultivation of partner relationships were key ingredients to the successful start of the project. Critical in this was respect by CERMES for the situation of under-capacity and over-work faced by many fishery authorities and their SocMon team members. The planning process had to proceed at the pace appropriate to the partners rather than one set by the project management agency. It was also important to try to fully understand the circumstances of the monitoring site, and the level of priority likely to be accorded to the SocMon initiative by all of the invited participants (Pena and McConney 2008a).

The quality of data collected among sites was fairly good and in most cases is baseline data on which future monitoring may be based. In general sites could have made more use of secondary data collected to corroborate primary data. This was an overall weakness at all project sites. Collection and use of secondary data therefore needs significant emphasis in future SocMon training workshops.

Communication by email was sometimes ineffective and this resulted in delays. Feedback from project sites, with the exception of St. Vincent and Dominica, was poor. Initiation of monitoring experienced significant delays in most sites in spite of follow-up from CERMES after training had concluded. Understandably prior commitments of partners impacted the progress of the project and significant delays encountered in Grenada and Nevis resulted in site visits by the project manager and/or investigator (CERMES 2008a-d). Meetings in Barbados with the SocMon team were held to expedite site initiation and monitoring progress.
Recommendations provided in the workshop evaluations as well as problems encountered in designing questions for surveys will be taken into account by CERMES in future rounds of SocMon initiatives. As suggested in the recommendations given by training workshop participants, there is the need to extend the duration of training workshops to perhaps four or five days with special emphasis on questionnaire design, pre-testing of the questionnaire and data analysis. Alternatively, due to the significant delays in initiation of site monitoring and reporting the process of future SocMon projects will have to be examined. SocMon workshops may now have to be conducted for extended periods of time of up to two weeks as is presently being practised in the Pacific region. This will ensure that the initiation of monitoring and data analysis will be conducted and completed with onsite assistance from the project manager and project investigator. The Fisheries SocMon project has proven that in most cases, unfortunately, a significant amount of ‘hand-holding’ of SocMon teams is required. Intense SocMon workshops and monitoring will expedite data collection and analysis, resulting in timely reporting and less frustration for the project manager and investigator.

Ways of encouraging information sharing between sites need to be determined. The lack of information sharing exhibited between sites for the duration of the project may be due to the fact that participants are not familiar with each other, do not realise the importance of information sharing or simply do not want the information overload.

6 REFERENCES AND PROJECT OUTPUTS


APPENDICES

Appendix 1: Project proposal

NOAA Coral Reef Conservation Grant Program – International Grant - Regional socio-economic monitoring

1 Project outline

1.1 Project title
Socio-economic monitoring by Caribbean fishery authorities

1.2 Applicant organization
Centre for Resource Management and Environmental Studies (CERMES), The University of the West Indies, Cave Hill Campus, Barbados

1.3 Project manager
Dr. Patrick McConney, Senior Lecturer, CERMES, UWI
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1.4 Contact Information

1.5 Programme category
- International Coral Reef Conservation
- Regional socio-economic monitoring
- Funding Opportunity No: NCS-IPO-2007-2000794

1.6 Geographic location
Selected English-speaking Caribbean CARICOM countries

1.7 Grant request and matching funds
Grant request: US$38,000
Matching funds: US$38,000 from CERMES,
Duration: October 1, 2007 to March 31, 2009

1.8 Project summary
The Centre for Resource Management and Environmental Studies (CERMES) is the SocMon lead organisation for the English-speaking Caribbean. Fisheries authorities in the CARICOM Member States are part of the Caribbean Regional Fisheries Mechanism (CRFM). These authorities and CRFM Secretariat have requested training in SocMon Caribbean methods in support of inshore fisheries and coastal management under their jurisdiction. Training is to be provided in selected CARICOM countries by CERMES in partnership with the authority and CRFM Secretariat via a series of five 3-day workshops with follow-up field studies at 5 assessment and monitoring sites. It is intended to train 50 fisheries stakeholders and produce outputs for the global SocMon database, UWI, CRFM and regional meetings to enhance further uptake of SocMon.
2 Project need

National and regional fisheries authorities in the Caribbean Community (CARICOM) region have long articulated the need for more attention to be paid to socio-economics in data collection, information generation and decision-making. This was considered by the Caribbean Regional Fisheries Mechanism (CRFM) Ad Hoc Working Group on Methods, and although a report on “Expansion of Existing Data Collection Systems to Capture, Store and Manage Social and Economic Data from the Fisheries Sector” (Banks et al 2002) has been prepared little progress has been made by fisheries authorities towards implementation. This regional need was confirmed again recently at the Second Annual CRFM Scientific Meeting held in Port of Spain, Trinidad and Tobago, 13-22 March 2006 (CRFM in prep.). It is now more intense with the coming into being of the CARICOM Single Market and Economy (CSME).

In keeping with the Memorandum of Understanding between the Caribbean Regional Fisheries Mechanism (CRFM) and the School for Graduate Studies and Research, University of the West Indies, the Centre for Resource Management and Environmental Studies (CERMES) proposed to offer training in socio-economic monitoring to fisheries authorities and their stakeholders in CRFM Member States at a significantly reduced cost in order to assist in addressing this lack of progress. This offer was accepted by fisheries officers attending the Special Meeting of the Caribbean Fisheries Forum, 23 – 24 October 2006. Guyana. Seven CRFM Member States expressed interest in the offer: The Bahamas, Dominica, Grenada, Jamaica, Montserrat, St. Lucia, St. Vincent and the Grenadines. Others (e.g. Antigua and Barbuda, Barbados) may also be interested.

The CERMES offer and country expressions of interest by their senior fisheries officials are shown in the section on supporting documentation at the end of this proposal along with endorsement from the CRFM Secretariat.

3 Objectives

This project has four main objectives. They are to:

1. Train between 50 fisheries management stakeholders, located in 5 selected CRFM member countries, in the use of SocMon Caribbean methods via a series of in-country practically oriented workshops.
2. Assist the initiation of 5 site assessment and monitoring programs for fisheries-related coastal management in the selected CRFM member states that received the training.
3. Document the training and monitoring initiation processes and make them available to a worldwide audience and CERMES communications in order for them to be replicated, with improvement, in future rounds of SocMon activity.
4. Submit compatible data to the Reef Base Socio-Economic global database.

4 Implementation strategy

This section sets out how the objectives will be achieved. Also see the task timetable.
4.1 Project team

Dr. Patrick McConney is a Senior Lecturer at the Centre for Resource Management and Environmental Studies (CERMES) of the UWI Cave Hill Campus in Barbados. He has an interdisciplinary doctorate in resource management from the University of British Columbia and is a former Chief Fisheries Officer in Barbados. On behalf of CERMES he formulates, implements and evaluates marine science projects around the Caribbean. This has included the development and promotion of SocMon Caribbean methodology.

He is responsible for promoting and supporting the use of SocMon in the English-speaking Caribbean and has conducted training at monitoring sites, at the White Water to Blue Water partnership meeting, in the Turks and Caicos Islands, at a UNEP regional workshop for MPA managers and for classes of graduate students. He has supervised several graduate students in the use of SocMon in their MSc and PhD research.

The other key team member is Ms Maria Pena, CERMES MSc graduate and Project Officer, who assisted the inaugural SocMon Caribbean regional workshop in 2003, participated in the Negril Marine Park and Tobago Cays Marine Park SocMon studies, has presented research results at conferences and assists Dr. McConney in support of SocMon initiatives. She will assist in the delivery of training and other project outputs.

Other members of the CERMES faculty and associates may assist in enhancing the SocMon training with special modules on coastal co-management, resource valuation, livelihood analysis etc. that have been of interest in previous studies. Partnerships will also be forged or strengthened with key players in the participating fisheries authorities to foster ownership of SocMon rather than treat them as passive beneficiaries.

4.2 Objective 1: training workshops

All CRFM fisheries authorities will be invited to apply for the training in a competitive process by submitting an application form. This process will allow the commitment and capacity of the authority, and suitability of the potential study site, to be assessed by CERMES so that the best prospects are selected. The budget will cover 5 countries.

Experience suggests that for regional coverage a series of national workshops is more cost effective, efficient and successful in creating a critical mass of knowledge about SocMon than a large regional workshop with pairs of participants, as has been tried in the past. This approach requires a travelling trainer, local logistic support and potential local study site for practical exercises. It has been previously used by CERMES (e.g. Negril Marine Park). The optimum size of training class is about 10-20 participants.

The generic training outline is contained in the CERMES proposal (see supporting documents). The three-day session combines concepts with practice to provide a thorough introduction to SocMon that can be fit into the busy schedules of fisheries stakeholders. In addition to fisheries officers the course should attract fishers, landing site personnel, planners, coastal managers, enforcement agencies, local consultants and others. Using a local potential study site throughout enhances the relevance of the training and likelihood of follow-up. A typical program for a three-day training course is:
• Introduction to SocMon Caribbean
• Selected Caribbean case studies
• Practical exercises in using SocMon
• Local study site visit or presentation
• Plan monitoring project for study site
• Specialised modules or preparation
• Workshop evaluation and follow-up

Specialised methods modules will be offered on the third day, including site-specific activities if the fisheries authority has selected its assessment site and can prepare a monitoring plan during the course of the workshop. Additional training or advice can be immediately offered by the trainer on site. All training will utilise the SocMon Caribbean guidelines (Bunce and Pomeroy 2003) and manual (Bunce et al 2000).

4.3 Objective 2: Initiating monitoring
Each participating fisheries authority will be given the opportunity to apply for a small grant to assist in the initiation of monitoring, supported by communication and 2 visits from CERMES as needs dictate. We expect that 5 training sites will be ready to start monitoring within the timeframe of this project. The fisheries authority will be expected to form and lead a SocMon team and produce a report within the period of this project.

Where possible, the potential study site used in the training will be selected, but following the training other or better candidate sites may emerge. These may include potential marine protected areas, sites of fish landing facilities or other infrastructure, areas of tourism development, locations for community based (co-)management that include aquaculture and others. Although it is not possible to specify monitoring sites in each eligible country at this stage, experience has shown that typically there is no shortage of fisheries related sites suitable for the application of SocMon in any CRFM member state. Monitoring will be initiated at 5 sites via site assessment. If a country does not request a grant, the funding opportunity will be available for another to have 2 sites or create a single larger monitoring program, if the latter is likely to be sustainable.

4.4 Objective 3: process documentation
CERMES has previously documented its SocMon training and the outputs produced in SocMon projects. In this project new components may be added. CERMES will report on the training and fisheries authorities will report on their initiation of monitoring. These documents will be made available on the CERMES web site. They may also be used, as others have been in the past, as teaching material for graduate students and outreach with NGOs around the region. If sufficient site monitoring is initiated in time, the results may be presented at the 61st annual meeting of the Gulf and Caribbean Fisheries Institute (GCFI) planned for Guadeloupe.

4.5 Objective 4: data sharing
Compatible data will be submitted to the Reef Base Socio-Economic global database by use of standard reporting formats based on the selected indicators (also see above).
Data sharing with the SocMon leader for the Spanish-speaking Caribbean at the University of Zamarano will also be pursued.

5 Task timetable

The following schedule of implementation is suggested, taking into account the need for the fisheries authorities to also service other activities, and the preference for completing the training within the first half of the year.

<table>
<thead>
<tr>
<th>Major activities: 2007</th>
<th>J</th>
<th>F</th>
<th>M</th>
<th>A</th>
<th>M</th>
<th>J</th>
<th>J</th>
<th>A</th>
<th>S</th>
<th>O</th>
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<th>D</th>
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</thead>
<tbody>
<tr>
<td>Application process for SocMon training</td>
<td></td>
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<td></td>
<td></td>
<td>X</td>
<td>X</td>
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<tr>
<td>Selection of fisheries authorities and sites</td>
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<td></td>
<td>X</td>
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<tr>
<td>Preparation of training materials and team</td>
<td></td>
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<td>X</td>
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<tr>
<td>Major activities: 2008</td>
<td>J</td>
<td>F</td>
<td>M</td>
<td>A</td>
<td>M</td>
<td>J</td>
<td>J</td>
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<td>D</td>
</tr>
<tr>
<td>Implementation of 5 training workshops</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td></td>
</tr>
<tr>
<td>Selection of 5 monitoring initiation sites</td>
<td>X</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Initiation of site monitoring with support</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Reporting of training and monitoring</td>
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<td></td>
<td></td>
<td>X</td>
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</tr>
<tr>
<td>Presentation at GCFI 2008 (optional)</td>
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<tr>
<td>GCFl paper review and revision (optional)</td>
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<tr>
<td>Major activities: 2009</td>
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<td>F</td>
<td>M</td>
<td>A</td>
<td>M</td>
<td>J</td>
<td>J</td>
<td>A</td>
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<tr>
<td>Sustainability planning for monitoring</td>
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<tr>
<td>Preparation of final project reports</td>
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<td>X</td>
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<td></td>
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<tr>
<td>Project close</td>
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<td>X</td>
</tr>
</tbody>
</table>

6 Fit into management strategy

The fit into national and regional management strategies is reflected in the CRFM meetings and the commissioning of a study on the use of social and economic data in fisheries management. At the level of specific fisheries, there are national fisheries management plans being developed and implemented with support from the CRFM that call for socio-economic data. The project also fits into the strategy of UWI to operationalise its MOU with the CRFM through research, advice, training and outreach.

7 Project outcomes and products

In relation to the implementation strategy and task timetable, the project’s products and outcomes are as follows:

<table>
<thead>
<tr>
<th>Product</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report on application process for selecting SocMon training participants and sites</td>
<td>50 preferred participants and 5 study sites</td>
</tr>
<tr>
<td>Reports of SocMon training workshops</td>
<td>At least 50 trained fisheries stakeholders</td>
</tr>
<tr>
<td>Reports on site assessment initiation</td>
<td>At least 5 monitoring programs established</td>
</tr>
<tr>
<td>Training and site monitoring final reports</td>
<td>Shared information for improving SocMon</td>
</tr>
<tr>
<td>Oral presentation and paper at GCFI 2008</td>
<td>Sharing of project findings with region</td>
</tr>
<tr>
<td>Report on participatory project evaluation</td>
<td>Lessons learned and shared in the region</td>
</tr>
</tbody>
</table>
8 Partner justification and roles
CERMES is the lead agency for SocMon in the English-speaking Caribbean. It will partner with national fisheries management authorities to further develop mutually beneficial relationships in the use of socio-economic data. The CRFM Secretariat will be engaged for the evaluation. The roles of the principal partners are listed below.

<table>
<thead>
<tr>
<th>National fisheries authorities</th>
<th>CERMES SocMon project team</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applying for training and selecting sites</td>
<td>Selecting participants and monitoring sites</td>
</tr>
<tr>
<td>Local organisation of workshops</td>
<td>Preparation of SocMon training materials</td>
</tr>
<tr>
<td>Arranging for follow-up monitoring</td>
<td>Incorporating products into database</td>
</tr>
<tr>
<td>Reporting on initial site monitoring</td>
<td>Making presentation at GCFI meeting</td>
</tr>
<tr>
<td>Planning for monitoring sustainability</td>
<td>Monitoring and evaluation with CRFM</td>
</tr>
</tbody>
</table>

9 Evaluating success
CERMES will monitor and evaluate the project against its objectives (50 fisheries stakeholders trained, 5 assessment monitoring sites initiated, outputs disseminated) and seek input from the CRFM Secretariat to confirm that the project is meeting the needs of the region (socio-economic data now used in fisheries management planning). There will be oral or written evaluation by the participants at the end of each workshop for quality assurance. Additional evaluation will include tracking the implementation of monitoring by the fisheries authorities to further ensure quality assurance and assess workshop impacts.

10 Budget and narrative
The US$38,000 in federal funds and US$38,000 in matching funds required for the project are described below in the narrative and budget table below.

**Personnel (Federal Share) - $6,750**
- Project Officer Maria Pena will receive a stipend for technical assistance and project management to which CERMES will match. Her grant-sourced monthly stipend will be 50% of $1,000/month over 9 months. Total: $4,500.
- One or two persons at each of the workshops are eligible to receive small stipends for assisting with their organization at $450 for each of 5 trainings. Total: $2,250.

**Personnel (Non-Federal Share) - $33,300**
- CERMES Project Manager, Patrick McConney, will provide 9 months of project management and technical leadership at a value of $3,200/month. Total: $28,800
- Project Officer Maria Pena will receive a stipend for technical assistance and project management to which CERMES will match. Her CERMES monthly stipend will be 50% of $1,000/month over 9 months. Total: $4,500.

**Fringe Benefits (Federal Share) - None**

**Fringe Benefits (Non-Federal Share) - None**
Travel (Federal) - $13,750

- Travel support for a CERMES trainer to attend the training workshops is to cover airfare ($300 x 5 trips), accommodation ($90/night x 20 nights) and per diem ($50 x 20 days) for each of the five 3-day workshops given an extra day for preparation making each a 4-day trip. Total overall for 5 training workshops at $860 each: $4,300.
- Workshop travel also includes local travel funding for participants to get to the workshop and use their vehicles for transport to site visits. calculated per workshop as 15 people for 3 days each at $10/day. Total overall for 5 training workshops at $450 each: $2,250.
- Travel support is also needed for a CERMES trainer to pay two technical assistance, monitoring and evaluation visits of 3 days total duration to each of the 5 assessment and monitoring sites. The estimation for airfare ($300 x 10 trips), accommodation ($90/night x 30 nights) and per diem ($50 x 30 days) for the two 3-day trips per site. Total: $7,200.

Travel (Non-Federal) – $1,000
- CERMES will cover some billable costs such as airport taxes and transportation. Total: $1,000.

Equipment (Federal) - none

Equipment (Non-Federal) - none

Supplies (Federal) - $4,500
- Working lunches for the training workshops are essential to achieving training objectives due to venue logistics and workshop time constraints. Costs are $20 per person for 15 participants over 3 days at each of the 5 workshops. Total: $4,500.

Total Supplies (Federal): $4,500.

Supplies (Non-Federal) - $3,000
- Training materials for the workshops will be supplied by CERMES, including document folders and other stationery, copied worksheets and guidelines, maps and handouts. In-house production is $100 per workshop. Total: $500.
- CERMES will produce paper and electronic project documents (including CDs for distribution) and cover reporting costs including formatting information for upload to web pages that are kept updated. Total: $2,500.

Contractual (Federal) - $13,000
- Venues for the training workshops will be rented averaging $100 each. Total $500.
- Five countries will be eligible for sub-grants of $2,500 each for site assessment and to initiate monitoring. Total: $12,500.

Contractual (Non-Federal) - None
Other (Federal) - None

Other (Non-Federal) - $700
- Communications costs (faxes, overseas calls, internet web pages, etc.) will be done by CERMES. Total: $700.

Total Direct Charges:
Federal: $38,000 + Non-Federal: $38,000 = $76,000

Total Indirect Charges:
Federal: $0.00 + Non-Federal: $0.00 = $0.00

Total Charges:
Federal: $38,000 + Non-Federal: $38,000 = $76,000

<table>
<thead>
<tr>
<th>Description of expenditure</th>
<th>federal funds</th>
<th>matching funds</th>
<th>total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project manager (P. McConney)</td>
<td>-</td>
<td>28,800</td>
<td>28,800</td>
</tr>
<tr>
<td>Research assistant (M. Pena)</td>
<td>4,500</td>
<td>4,500</td>
<td>9,000</td>
</tr>
<tr>
<td>Local workshop organiser stipends</td>
<td>2,250</td>
<td>-</td>
<td>2,250</td>
</tr>
<tr>
<td>Personnel Total</td>
<td>6,750</td>
<td>33,300</td>
<td>40,050</td>
</tr>
<tr>
<td>Travel</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training workshops trainer</td>
<td>4,300</td>
<td>1,000</td>
<td>5,300</td>
</tr>
<tr>
<td>Training workshop local travel</td>
<td>2,250</td>
<td>-</td>
<td>2,250</td>
</tr>
<tr>
<td>Site assessment support visits</td>
<td>7,200</td>
<td>-</td>
<td>7,200</td>
</tr>
<tr>
<td>Travel Total</td>
<td>13,750</td>
<td>1,000</td>
<td>14,750</td>
</tr>
<tr>
<td>Supplies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training workshops working lunches</td>
<td>4,500</td>
<td>-</td>
<td>4,500</td>
</tr>
<tr>
<td>Training workshops materials</td>
<td>-</td>
<td>500</td>
<td>500</td>
</tr>
<tr>
<td>Documentation and reporting</td>
<td>-</td>
<td>2,500</td>
<td>2,500</td>
</tr>
<tr>
<td>Supplies Total</td>
<td>4,500</td>
<td>3,000</td>
<td>7,500</td>
</tr>
<tr>
<td>Contractual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training workshop venue rentals</td>
<td>500</td>
<td>-</td>
<td>500</td>
</tr>
<tr>
<td>Site assessment and monitoring</td>
<td>12,500</td>
<td>-</td>
<td>12,500</td>
</tr>
<tr>
<td>Contractual Total</td>
<td>13,000</td>
<td>-</td>
<td>13,000</td>
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<tr>
<td>Other</td>
<td></td>
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<td></td>
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<tr>
<td>Communications (phone, fax, internet)</td>
<td>-</td>
<td>700</td>
<td>700</td>
</tr>
<tr>
<td>Other Total</td>
<td>-</td>
<td>700</td>
<td>700</td>
</tr>
<tr>
<td>Total direct charges</td>
<td>38,000</td>
<td>38,000</td>
<td>76,000</td>
</tr>
</tbody>
</table>
11 Sources of matching funds

CERMES is currently the sole source of matching funds, with the bulk of this being salary contribution, and the remainder being supplies and services. These will come from normal operating expenses.

12 References


CRFM. In prep. Report of the Second Annual CRFM Scientific Meeting held in Port of Spain, Trinidad and Tobago, 13-22 March 2006. CRFM Secretariat.


13 Supporting documents
PROPOSAL FOR CERMES TO PROVIDE TRAINING IN SOCIO-ECONOMIC MONITORING TO FISHERIES AUTHORITIES AND THEIR STAKEHOLDERS IN CRFM MEMBER STATES

National and regional fisheries authorities in the CARICOM region have long advocated that more attention be paid to socio-economic matters in data collection, information generation and decision-making. This was discussed recently at the Second Annual CRFM Scientific Meeting held at the Cascadia Hotel and Conference Centre, Port of Spain, Trinidad and Tobago, 13-22 March 2006. Little progress has been made by fisheries authorities in this regard.

In keeping with the Memorandum of Understanding between the Caribbean Regional Fisheries Mechanism (CRFM) and the School for Graduate Studies and Research, University of the West Indies, the Centre for Resource Management and Environmental Studies (CERMES) proposes to offer training in socio-economic monitoring to fisheries authorities and their stakeholders in CRFM Member States at a significantly reduced cost in order to assist in addressing this lack of progress. The training will be based on the 'SocMon Caribbean' methodology that is primarily site-oriented, but aspects of which can be incorporated into more general national coverage.

The SocMon training workshops tend to be for 2 or 5 days depending on training intensity: 1. Two day workshop is entirely in the classroom, involving case study exercises for practice. 2. Five day workshop includes classroom work and field experience of all stages of SocMon. A general outline of SocMon training is attached. More information is on the CERMES web site.

A typical training group consists of not more than 20 people who will be split into teams. Group members may be drawn from the fisheries authority, coastal management organisations, marine enforcement agency, planning and statistical departments, non-governmental organisations and any other entity likely to be involved in collecting, using or demanding socio-economic data. The two day course requires a local case study and the five day course a nearby site for fieldwork. A marine protected area, coastal settlement, fish landing or fairly confined fishery can be used.

CERMES delivers SocMon training in the region to national and regional clients for a fee. It is proposed to waive the fee (US$1,500 for a 2 day course and US$3,500 for a 5 day course). This fee is for the professional services of the trainer, customised course design, training materials and reporting. These costs will all be absorbed by CERMES, leaving the client only the costs of airfare and accommodation for the trainer and local workshop hosting expenses. These costs will vary with location. CERMES also offers, as part of its regional outreach, follow-up technical advisory support by internet to parties involved in SocMon studies. We have assisted clients in obtaining grant funds from international sources to conduct SocMon studies.

If the CRFM Secretariat and/or fisheries authorities in CRFM Member States are interested in following up on this proposal, to discuss options and make arrangements they should contact:

Dr. Patrick McConney, Senior Lecturer
Centre for Resource Management and Environmental Studies
University of the West Indies, Cave Hill Campus, Barbados
Phone: (246)-417-4725, Fax: (246)-424-4204
Email: pmconney@caribsurf.com
http://www.cavehill.uwi.edu/cermes
Socio-economic monitoring for coastal management in the Caribbean (SocMon Caribbean) training outline

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

Aim: To increase and improve the use of socio-economic information in fisheries and coastal management decision-making by all stakeholders in the process

Target group: Fisheries and coastal resource managers, technical staff and stakeholders

Course Objectives – at the end of the course participants will know answers to:
- What is SocMon Caribbean?
- Why should I do socio-economic monitoring?
- What socio-economic data do I collect?
- How to collect and analyze data?
- How to generate, present and use information?

Course content:
- Introduction to SocMon Caribbean and socio-economic monitoring
- Preparatory activities: goals and objectives, process and work plan, study area, stakeholder analysis, study approvals, assessment team
- Key informants, secondary data, household interviews, observation
- Methods: content analysis, survey design and implementation, long interviews
- Coding; data tables, software, simple statistics, presentation of information
- Validation workshop, final report, use/learn/adapt cycle, sustaining monitoring

Methods of instruction: Presentations, interactive discussion and group practice sessions

Teaching aids: PowerPoint slides, flip chart, handouts and exercises, SocMon guidelines/CD

References:
November 10, 2006

Dr. Patrick McConney
CERMES
UWI
Barbados

Dear Dr. McConney,

The CERMES Secretariat endorses the effort by CERMES to offer training and studies in the SocMon Caribbean methodology to selected fisheries authorities in CARICOM countries in the region. This fits well within the objectives and programmes of the CRFM in meeting the needs of its Member States.

Sincerely,

[Signature]

Milton Haughton
Deputy Executive Director
Appendix 2: Project evaluation survey

Evaluation of the
"Socio-economic Monitoring by Caribbean Fishery Authorities" Project

DIRECTIONS: Please rate (x) how much you agree or disagree with each of the statements listed below.

The goal of this project was to increase and improve the use of site specific socio economic information in fisheries and coastal management decision making by fisheries stakeholders at monitoring sites.

1. Given the statement in the box above, the goal for the project was fully achieved.
   - ______ strongly agree
   - ______ agree
   - ______ neither agree or disagree
   - ______ disagree
   - ______ strongly disagree
   - ______ I don't know

There were two main project components associated with this goal to be achieved by monitoring sites:
   • Live in-country practically-oriented 3-day training workshops in DocMon Caribbean methodology
   • Initiation of five site monitoring programs for fisheries-related coastal management in the five selected CRMN member states that received the training

2. Given the statement in the box above, the 3-day training workshop (introduction to Section Caribbean methods) fully prepared the entire Section team for the site monitoring program.
   - ______ strongly agree
   - ______ agree
   - ______ neither agree or disagree
   - ______ disagree
   - ______ strongly disagree
   - ______ I don't know

3. If the response in #2 was "disagree" or "strongly disagree", indicate ways to improve the training:
   1.
   2.
   3.

4. The site monitoring that was done provided valuable data which may be used to guide coastal resource management and decision making
   - ______ strongly agree
   - ______ agree
   - ______ neither agree or disagree
   - ______ disagree
   - ______ strongly disagree
   - ______ I don't know
5. List three main successes achieved during the monitoring process.
   1. 
   2. 
   3. 

6. List three main challenges encountered during the monitoring process.
   1. 
   2. 
   3. 

7. The validation meeting/workshop provided useful additional insight into the data collected.
   ______ strongly agree  
   ______ agree          
   ______ neither agree or disagree  
   ______ disagree       
   ______ strongly disagree  
   ______ I don’t know    

8. My own (personal) expectations for why I participated in this project were fully achieved.
   ______ strongly agree  
   ______ agree          
   ______ neither agree or disagree  
   ______ disagree       
   ______ strongly disagree  
   ______ I don’t know    

9. I would recommend further SocMon follow-up monitoring at the site in the future.
   ______ strongly agree  
   ______ agree          
   ______ neither agree or disagree  
   ______ disagree       
   ______ strongly disagree  
   ______ I don’t know    

Page 2 of 3
10. My abilities as a fisheries management professional (or stakeholder) have been improved as a result of this SocMon project.

   ______ strongly agree
   ______ agree
   ______ neither agree or disagree
   ______ disagree
   ______ strongly disagree
   ______ I don't know

11. I enjoyed participating in the site monitoring program.

   ______ strongly agree
   ______ agree
   ______ neither agree or disagree
   ______ disagree
   ______ strongly disagree
   ______ I don't know

12. The things I liked most about the SocMon process were: (list/write)

13. The things I liked least about the SocMon process were: (list/write)

14. If I had to recommend that some changes be made to the SocMon process (training, data collection, data analysis, validation, report writing), they would be: (list/write)

15. Other thoughts, comments, or suggestions?