Socio-economic Monitoring by Caribbean Fishery Authorities:
Partnerships and preparation
October 2007 to April 2008

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1 OVERVIEW OF THE PROJECT

The context and background to the project appears in the project proposal (Appendix 1). The project has four main components:

1. Training of 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. Assisting with the initiation of 5 site assessment and monitoring programs for fisheries-related coastal management in the selected CRFM member states that receive the training.
3. Documenting the training and monitoring initiation processes and making 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. Submission of compatible data to the Reef Base Socio-Economic global database

This report provides a summary of progress in creating partnerships with stakeholders and leaders at selected monitoring sites, and in planning the implementation of the first component of the project – the training workshops.

2 FISHERY AUTHORITY APPLICATIONS FOR TRAINING

Upon learning of approval in May 2007 of the project on Socio-economic monitoring by Caribbean fishery authorities, CERMES prepared for the project start. Applications for training in socio-economic monitoring (SocMon) were sought from CARICOM countries in October 2007 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 (Appendix 2). Completed applications (Appendix 3) were submitted by four authorities, Dominica, Grenada, Barbados and Nevis within the first month. The St. Vincent and the Grenadines Fisheries Division submitted its application in February 2008.

3 PROJECT ANNOUNCEMENT

The project fully incorporated the five participating fishery authorities and the Caribbean Regional Fisheries Mechanism (CRFM) Secretariat in the first week of February 2008 and was announced across the region (Appendix 4). CERMES requested permission to use the logos and/or identifying marks of all participating fishery authorities and the CRFM on future project products in order to prominently acknowledge them as project partners and establish joint ownership of this SocMon initiative.

4 WORKSHOP LOGISTICS

Site preparations

Participating fishery authorities, selected as the site monitoring leaders in all locations, were provided with a draft generic workshop agenda (Appendix 5). Workshop training dates, local workshop organisers and SocMon lead individual contacts were then confirmed and identified.
for all sites (Table 1). 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 Maria Pena (CERMES Project Officer) for processing and disbursement of funds so that they could organize the workshops themselves. The aim was to further contribute to ownership by the partners.

**Table 1 Workshop training dates and site contacts**

<table>
<thead>
<tr>
<th>Fishery authority</th>
<th>Training date</th>
<th>SocMon lead contact</th>
<th>Local workshop organiser</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barbados</td>
<td>5-7 May</td>
<td>Stephen Willoughby (CFO)</td>
<td>Chris Parker (FB)</td>
</tr>
<tr>
<td>Dominica</td>
<td>14-16 May</td>
<td>Harold Guiste (SFO)</td>
<td>Norman Norris (FO)</td>
</tr>
<tr>
<td>Nevis</td>
<td>20-22 May</td>
<td>Audra Barrett (CFO)</td>
<td>Audra Barrett/Laurel Artherton</td>
</tr>
<tr>
<td>Grenada</td>
<td>27-29 May</td>
<td>Paul Phillip (FO I)</td>
<td>Crafton Isaac (FO)</td>
</tr>
<tr>
<td>St. Vincent &amp; the Grenadines</td>
<td>3-5 June</td>
<td>Jennifer Cruickshank (SFO)</td>
<td>Angus Dennie (FA)</td>
</tr>
</tbody>
</table>

CFO – Chief Fisheries Officer  
SFO – Senior Fisheries Officer  
FO – Fisheries Officer  
FA – Fisheries Assistant  
FB – Fisheries Biologist

Training was to be offered to a maximum of 20 fisheries stakeholders per site, the selection of whom was at the discretion of the fishery authorities. CERMES advised the authorities to seek out participants from planning and statistical departments, coastal zone management (if distinct from fishery authority), NGOs, persons dealing with secondary school education, key stakeholder organisation representatives and key residents in the respective area in order for there to be wide stakeholder involvement in the project.

Each fishery authority provided a preliminary site description of the study area chosen for implementation of socio-economic monitoring. This site-specific information was incorporated into the training workshop presentations.

*Training material preparation*

PowerPoint slide presentations providing an overview of this project and detailed, but generic, training information on SocMon Caribbean methodology were prepared.

An add-on SocMon related session, comprising about 3 hours of presentation and practical, on economic valuation, livelihoods analysis, co-management or MPA management effectiveness were 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 (Appendix 6).

Workshop packages were prepared for participants at each site. These comprised the following:

- Project announcement
- Workshop outline
- Workshop agenda
- Main course books provided in hardcopy and electronically in CD: 

• Fisheries SocMon monitoring site preliminary description
• Specialisation modules outlines
• Generic SocMon PowerPoint presentation handout
• SocMon Caribbean training handout: examples of questions, coding and data table
• Canaries, St. Lucia case study and Quick look at Canaries PowerPoint presentation handouts
• La Parguera, Puerto Rico case study PowerPoint presentation handout
• Negril, Jamaica Preparatory case study PowerPoint presentation handout
• Worksheets
• Workshop evaluation form

Local workshop organisation
There was good adherence of local workshop organisers to the timeline set for workshop preparations. Communication via email was effective during this period of preparation.

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. 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.
6 APPENDICES

Appendix 1: Socio-economic monitoring by Caribbean fishery authorities 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
Assistant: Ms Maria Pena, CERMES Project Officer

1.4 Contact information
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Web site: http://www.cavehill.uwi.edu/ermes

1.5 Programme category
- International Coral Reef Conservation
- Regional socio-economic monitoring
- Funding Opportunity No: NOS-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 Lecture 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, livelihoods 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 Zamareno 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.

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<tr>
<th>Major activities: 2007</th>
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<td>Application process for SocMon training</td>
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<td>Selection of fisheries authorities and sites</td>
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<tr>
<td>Preparation of training materials and team</td>
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<td>Selection of 5 monitoring initiation sites</td>
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<td>Initiation of site monitoring with support</td>
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<td>Reporting of training and monitoring</td>
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<td>Presentation at GCFI 2008 (optional)</td>
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<td>Sustainability planning for monitoring</td>
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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>

5
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

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<th>Description of expenditure</th>
<th>Federal funds</th>
<th>Matching funds</th>
<th>Total</th>
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<tr>
<td>Project manager (P. McConney)</td>
<td>-</td>
<td>28,600</td>
<td>28,600</td>
</tr>
<tr>
<td>Research assistant (M. Pena)</td>
<td>4,500</td>
<td>4,500</td>
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<td>Local workshop organiser stipends</td>
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</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
UVi
Barbados

Dear Dr. McConney,

The CRFM 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

Milton Haughton
Deputy Executive Director
Appendix 2: Project application form

Socio-economic monitoring by Caribbean fishery authorities
2007-2009
Application Form

Kindly indicate whether you are interested in participating in Fisheries SocMon: [ ] Yes [ ] No
1. Contact information for the Fisheries SocMon project leader
   Name
   Affiliation
   Address
   Telephone
   Facsimile
   Email

We will use this contact information for all correspondence concerning the 3-day training workshop, site assessment and monitoring activities unless you inform us otherwise

2. In the box, provide information on current work activities or research of your Fisheries Division associated with fisheries-related coastal monitoring

Current activities/research:

3. Provide names and locations of 1-3 potential study sites that may be suitable for application of SocMon

Study site description

4. Please select tentative dates for training during the period January to June 2008. If possible, in the column provide specific dates in the column provided

<table>
<thead>
<tr>
<th>Preferred dates</th>
<th>J</th>
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Signed __________________________ Date ____________________

Please return to Maria Pena at maria.pena@cavehill.uwi.edu or fax to (246) 424-4204
Appendix 3: Site applications

Socio-economic monitoring by Caribbean fishery authorities
2007-2009
Application Form

Kindly indicate whether you are interested in participating in Fisheries SocMon: [ ] Yes [ ] No

1. Contact information for the Fisheries SocMon project leader

<table>
<thead>
<tr>
<th>Name</th>
<th>Norman Norris</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affiliation</td>
<td>Fisheries Division</td>
</tr>
<tr>
<td>Address</td>
<td>Ministry of Agriculture, Fisheries and Forestry</td>
</tr>
<tr>
<td></td>
<td>Roseau Fisheries Complex Bldg</td>
</tr>
<tr>
<td></td>
<td>M.E. Charles Blvd, Roseau, Dominica</td>
</tr>
<tr>
<td>Telephone</td>
<td>1-767-448-9140  1-767-286-6291/2</td>
</tr>
<tr>
<td>Facsimile</td>
<td>1-767-448-9140</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:fisheriesdivision@cwdom.dm">fisheriesdivision@cwdom.dm</a>, <a href="mailto:ncnorris@hotmail.com">ncnorris@hotmail.com</a></td>
</tr>
</tbody>
</table>

We will use this contact information for all correspondence concerning the 3-day training workshop, site assessment and monitoring activities unless you inform us otherwise.

2. In the box, provide information on current work activities or research of your Fisheries Division associated with fisheries-related coastal monitoring.

- USAID/COTS Research on impact of quarries on the marine environment
- Mainstream Adaptation to Climate Change (MACC) Coral Reef Monitoring for the OECS and Tobago.

3. Provide names and locations of 1-3 potential study sites that may be suitable for application of SocMon

- St. Lucia (Fisheries landing site) Pots and Nets (West Coast)
- St. Croix (Fisheries landing site) Pots and Nets (West Coast)

4. Please select tentative dates for training during the period January to June 2008. If possible, in the column provide specific dates in the column provided.

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</tbody>
</table>

Signed: [Signature]  Date: 29 October 2007

Please return to Maria Pena at maria.pena@cavehill.uwi.edu or fax to (246) 424-4214.
Socio-economic monitoring by Caribbean fishery authorities
2007-2009

Application Form

Kindly indicate whether you are interested in participating in Fisheries SocMon: [ ] Yes [ ] No

1. Contact information for the Fisheries SocMon project leader

Name: Paul E. Phillip
Affiliation: Fisheries Officer I (Marine Biologist)
Address: Fisheries Division, Ministerial Complex, Tarleton, St. George’s, GRENADA
Facsimile: 473-440-4191
Email: paulephilip@yahoo.com

We will use this contact information for all correspondence concerning the 3-day training workshop, site assessment and monitoring activities unless you inform us otherwise.

2. In the box, provide information on current work activities or research of your Fisheries Division associated with fisheries-related coastal monitoring.

Current activities/research:
At present, the only work activity on-going involves
(1) Inspection of vessels for registration and licensing purposes
(2) Fishing vessel census.

3. Provide names and locations of 1-3 potential study sites that may be suitable for application of SocMon

Study site description
1. Grenville
2. Gouyave
3. St. George’s
Socio-economic monitoring by Caribbean fishery authorities
2007-2009
Application Form

_kindly indicate whether you are interested in participating in Fisheries SocMon: [ ] Yes [ ] No

1. Contact information for the Fisheries SocMon project leader
   Name: STEPHEN WILLOUGHBY
   Affiliation: FISHERIES DIVISION
   Address: PRINCESS ALICE HIGHWAY
             BRIGHTON
             BARBADOS
   Telephone: 246-426-3745
   Facsimile: 246-436-9068
   Email: fishbarbados@caribsurf.com

_We will use this contact information for all correspondence concerning the 9-day training workshop, site assessment and monitoring activities unless you inform us otherwise._

2. In the box, provide information on current work activities or research of your Fisheries Division associated with fisheries-related coastal monitoring.

Current activities/research
   1. Survey of conch around Barbados
   2. Culture of seaweed
   3. Survey of trap fishermen
   4. Economic study of the turpentine fishery

3. Provide names and locations of 1-3 potential study sites that may be suitable for application of SocMon

   Study site description
   1. Oistins
   2. Pile Bay

4. Please select tentative dates for training during the period January to June 2008. If possible, in the column provide specific dates in the column provided.

<table>
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</tbody>
</table>

   Signed [Signature]  Date 07-11-20

_Please return to Maria Pena at maria.pena@cavehill.uwi.edu or fax to (246) 424-4204_
Socio-economic monitoring by Caribbean fishery authorities  
2007-2009

Application Form

Kindly indicate whether you are interested in participating in Fisheries SocMon:  [X] Yes  [ ] No

1. Contact information for the Fisheries SocMon project leader
   
   Name: Audra Barrett
   
   Affiliation: Department of Fisheries, Nevis Island Administration
   
   Address: Prospect Estate, St. John’s Parish, Nevis, St. Kitts/Nevis
   
   Telephone: 1 (869) 469 5521 ext # 2088/2161
   
   Facsimile: 1 (869) 469-0839
   
   Email: fisheries@niagov.com  ps.alhcf@niagov.com

We will use this contact information for all correspondence concerning the 3-day training workshop, site assessment and monitoring activities unless you inform us otherwise.

2. In the box, provide information on current work activities or research of your Fisheries Division associated with fisheries-related coastal monitoring

   Current activities/research
   1. Monitor beach erosion, turtle nesting sites, coastal vegetation, coral reef, acquired garbage.
   2. Provide training for fishers in the use of fishing gear and equipment, train fishers in seamanship, boat handling and navigation.
   3. Provide training for fishers in the use of fishing gear and equipment, boat handling and navigation.
   4. Carry out stock assessment of conch, lobster and fin fish resources.
   5. Marine management to allow fish stocks to recover.

3. Provide names and locations of 1-3 potential study sites that may be suitable for application of SocMon

   Study site description
   1. Booby Island shoals including the Narrows Straight between St. Kitts and Nevis
   2. Long Haul Bay coral reef (NE coast of Nevis)
   3. Monkey Reef shoals (NW coast of Nevis)

4. Please select tentative dates for training during the period January to June 2008. If possible, in the column provide specific dates in the column provided

<table>
<thead>
<tr>
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Signed: [Signature]

Date: 23rd November 2007

Please return to Maria Pena at maria pena@cavehill.uwi.edu or fax to (246) 424-4204
Report of the TCMP-ME Evaluation Results Sharing Meeting

---

Socio-economic monitoring by Caribbean fishery authorities
2007-2009

Application Form

Kindly indicate whether you are interested in participating in Fisheries SocMon: [ ] Yes [ ] No

1. Contact information for the Fisheries SocMon project leader

Name: Jennifer Cruickshank
Affiliation: Senior Fisheries Officer
Address: Fisheries Division
Ministry of Agriculture, Forestry and Fisheries
Kingstown, St. Vincent
Telephone: 1-784-456-2738
Facsimile: 1-784-457-2112
Email: fishdiv@caribsurf.com or jen_tori@yahoo.com

We will use this contact information for all correspondence concerning the 3-day training workshop, site assessment and monitoring activities unless you inform us otherwise.

2. In the box, provide information on current work activities or research of your Fisheries Division associated with fisheries-related coastal monitoring

Current activities/research

3. Provide names and locations of 1-3 potential study sites that may be suitable for application of SocMon

Study site description

1. Rose Place, Kingstown
2. Calliaqua

4. Please select tentative dates for training during the period January to June 2008. If possible, in the column provide specific dates in the column provided

<table>
<thead>
<tr>
<th>Preferred dates</th>
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<th>J</th>
</tr>
</thead>
</table>

Signed ___________________________ Date ___________________________

Please return to Maria Pena at maria.pena@cavehill.uwi.edu or fax to (246) 424-4204
Appendix 4: Project announcement

**Socio-economic monitoring by Caribbean fishery authorities (Fisheries SocMon)**

*Project Announcement*

The Centre for Resource Management and Environmental Studies (CERMES) of the University of the West Indies (UWI) Cave Hill Campus is implementing a project to increase and improve the use of site-specific socio-economic information in fisheries and coastal management decision-making by fisheries stakeholders in five locations:

- Barbados
- Dominica
- Grenada
- Nevis
- St. Vincent and the Grenadines

**Why a project on socio-economic monitoring for fisheries stakeholders?**

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.

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), the SocMon lead organisation for the English-speaking Caribbean, is offering training in socio-economic monitoring to fishery authorities and stakeholders in the five locations where interested parties have agreed to participate in this project.

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Centre for Resource Management and Environmental Studies (CERMES)
Appendix 5: Workshop agenda

SocMon Caribbean Training Workshop, [location] [date 2008]

Agenda

Day 1 [date]
08:30 Registration and document distribution
09:00 Welcome from project organisers, introduction of participants
09:15 Introduction Fisheries SocMon Project, workshop objectives and arrangements
09:30 Introduction to SocMon Caribbean and socio-economic monitoring: What is SocMon? Why do this? Where has SocMon been applied in the Caribbean and globally?
10:00 Break
10:15 Overview of SocMon and the training materials (with slides, handouts, guidelines, manual)
11:00 SocMon case study presentations (e.g. Canaries, Negril, Glover’s Reef and La Parguera)
12:00 Lunch
13:00 Introduction to monitoring site: study area situation analysis, goals, objectives, secondary data, review of variables, issues of concern, preparation for site scoping (allocate teams to tasks)
15:00 Break
15:15 Field trip to monitoring site for field scoping and de-brief on site
17:00 Close

Day 2 [date]
08:30 Review of lessons and impressions from Day 1
09:00 Planning for monitoring: goals and objectives, process and work plan, study area boundaries, stakeholder identification and consultation, study approvals, monitoring team, schedule and budget, selection of variables, special resources required, constraints, etc.
10:00 Break
10:15 Continue planning for monitoring …
12:00 Lunch
13:00 Monitoring methods: interview guides for key informants, household survey interviews, data management, data analysis, interpretation, observation, visualization
15:00 Break
15:15 Continue monitoring methods…
16:00 Using monitoring outputs: key learning, validation, audiences, reporting, communicating information for decision-making, adaptive management, monitoring cycle
17:00 Close

Day 3 [date]
08:30 Review of lessons and impressions from Day 2
09:30 Confirmation of the SocMon site monitoring plan and implementation
10:00 Break
10:15 Fisheries SocMon project participation and evaluation of workshop
11:00 SocMon specialization module
12:00 Lunch
13:00 SocMon specialization module
15:00 Close
Appendix 6: Specialisation modules outline

Socio-economic monitoring by Caribbean fishery authorities
(Fisheries SocMon)

❖ Specialisation Modules ❖

During the 3-day training workshop on the SocMon Caribbean methodology, an add-on SocMon-related session (about 3 hours of presentation and practical) on economic valuation, livelihoods analysis, co-management or MPA management effectiveness will be offered. SocMon is a basic set of guidelines and does not cover all the possible variables for socio-economic monitoring and will not provide answers to all questions that are important for coastal management. These modules will 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.

Following are descriptions for each module:

1. Economic valuation

   Aim: To build awareness of the economic value of natural resources, the methods used in measuring these values, and how valuation can be used to inform natural resource management decisions.

   Objectives – at the end of the session participants will know:
   - Why attempt to put monetary values on natural resources?
   - What situations call for resource valuation?
   - What methods are available for valuing natural resources?
   - How to collect data to facilitate value estimation?
   - What do economic values tell us and how can they be used to aid management?

   Session content:
   - Introduction to economic valuation of natural resources: theory, history and practice
   - Categories of economic values
   - Empirical methods for valuation of natural resources
   - Examples and regional case studies
   - Study design, implementation and costs

2. Livelihoods analysis

   Aim: To introduce the concept of livelihoods and the components of the sustainable livelihoods approach (SLA) framework. This provides guidance for assessing and improving coastal livelihoods.

   Objectives – at the end of the session participants will know:
   - What are sustainable and other types of livelihoods?
   - What is the sustainable livelihoods approach (SLA)?
   - What is the sustainable livelihoods framework?
   - How to apply the SLA to site monitoring?

   Session content:
   - Introduction to the Sustainable Livelihoods Approach (SLA)
   - Framework for sustainable livelihoods
   - Basic principles and processes for livelihoods analysis
   - Uses of the SLA in monitoring
   - Practical implementation of the SLA
3. Co-management

Aim: To understand the conceptual framework of terms and ideas behind coastal resource co-management, along with the conditions that favour its successful introduction and establishment in the Caribbean.

Objectives – at the end of the session participants will know:
- What is co-management?
- Why co-manage in the Caribbean?
- When do we start to co-manage?
- Where do we co-manage?
- Who do we co-manage with?
- How do we co-manage?
- Where do we go from here?

Session content:
- Concepts that distinguish co-management from other types of management; introduction to integrated coastal management
- Driving forces behind co-management; livelihoods, socio-cultural fit
- Co-management as a crisis response; resources and incentives
- Location and scale; establishing property rights
- Teamwork: knowing the stakeholders; roles for groups to work on
- Skills needed to improve the chances of co-management success
- Getting started: learning by doing; being innovative about it

4. MPA management effectiveness

Aim: To understand how to conduct an evaluation of management effectiveness for MPA sites using the methodology outlined in the "How is your MPA doing?" guidebook.

Objectives – at the end of the session participants will know:
- How to select the most appropriate biophysical, socio-economic and governance indicators with which to assess the management effectiveness of MPA sites?
- What are the processes, expected outputs and resource needs to complete an evaluation?
- How to develop a work plan and timeline for evaluation implementation?
- How does monitoring management effectiveness facilitate adaptive management?

Session content:
- Management effectiveness: What is it and why evaluate it?
- MPA guidebook introduction: What do you evaluate?
- What are the costs of evaluating management effectiveness?
- What are the benefits of evaluating management effectiveness?
- Selecting your indicators: biophysical, socio-economic and governance
- Using the results in adaptive management
Socio-economic monitoring by Caribbean fishery authorities
(Fisheries SocMon)

SocMon specialisation selection form

Please complete this form and forward it to Maria Pena by email to maria.pena@carribell.uwi.edu or by fax to (246) 424-4204.

1. Location and monitoring site
   □ Barbados (Site:____________________)
   □ Dominica (Site:____________________)
   □ Grenada (Site:____________________)
   □ Nevis (Site:____________________)
   □ St. Vincent and the Grenadines (Site:____________________)

2. Please check one of the modules below that you would like included in the Fisheries SocMon workshop.
   □ Economic valuation
   □ Livelihoods analysis
   □ Co-management
   □ MPA management effectiveness

3. Why is this module of particular relevance to this site?

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