

Strategic planning meeting for the Global Socioeconomic Monitoring Initiative for Coastal Management (SocMon/SEM-Pasifika)



NOAA Headquarters, Silver Spring, 25-27 February 2014



Table of Contents

| | | |
|-----|--|----|
| 1 | Background | 4 |
| 2 | Opening..... | 4 |
| 2.1 | Opening Remarks..... | 4 |
| 2.2 | Welcome – John Christensen, CRCP Manager..... | 5 |
| 2.3 | Welcome – Janna Shackeroff - International Program | 5 |
| 2.4 | SocMon overview..... | 5 |
| 2.5 | Meeting Expectations – Peter Edwards | 5 |
| 3 | Sharing stories from the nodes | 7 |
| 3.1 | South East Asia – Michael Pido..... | 7 |
| 3.2 | South Asia – Vineeta Hoon | 8 |
| 3.3 | Micronesia – Brooke Nevitt..... | 9 |
| 3.4 | Brazil – Rodrigo Medeiros | 10 |
| 3.5 | Central America – Arie Sanders | 12 |
| 3.6 | Caribbean – Maria Pena | 12 |
| 3.7 | Wrap up discussion | 13 |
| 4 | Other perspectives and initiatives..... | 15 |
| 4.1 | GCRMN Science: Improving the links to SocMon – Jeremy Jackson..... | 15 |
| 4.2 | SocMon/SEM Paskifika indicators in the Pacific and South East Asia– SupinWongbusarakum..... | 17 |
| 4.3 | General discussion | 19 |
| 5 | Strategic planning..... | 19 |
| 5.1 | Focus question and visioning..... | 19 |
| 6 | Day 1 wrap-up | 20 |
| 6.1 | Planning I - Barriers and blocks..... | 21 |
| 6.2 | Planning II - Strategic directions | 23 |
| 6.3 | Planning III - Action plans | 24 |
| 6.4 | Wrap up review..... | 25 |
| 7 | Day 3: Looking Forward – new Ideas, tools, approaches..... | 25 |
| 7.1 | Improved information exchange | 26 |
| 7.2 | Web, data storage, sharing etc (Maria Dillard)..... | 27 |
| 7.3 | Capacity building, needs, realistic expectations | 28 |
| 7.4 | New partnerships..... | 28 |
| 7.5 | SocMon “Branding” | 29 |
| 8 | Closure | 29 |
| 8.1 | Other items to discuss..... | 29 |
| 8.2 | Meeting evaluation | 30 |
| 8.3 | Closing Remarks, – Peter Edwards..... | 30 |

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Contact

Maria Pena
Centre for Resource Management and Environmental Studies
University of the West Indies, Cave Hill Campus, Barbados
Phone: (246) 417-4727 Fax: (246) 424-4204
Email: maria.pena@cavehill.uwi.edu
Web site: <http://www.cavehill.uwi.edu/cermes>

1 Background

The Global Socioeconomic Monitoring Initiative (SocMon/SEM Pasifika) has been in existence for over ten years. For any organization including a network of volunteers such as this initiative, it was felt that the time was right for taking a moment for introspection, reflecting on the past, examining the present realities and planning for the future. With this in mind, and based on the results from a survey of SocMon regional coordinators, the National Oceanic and Atmospheric Agency's (NOAA) Coral Reef Conservation Program, GCRMN, Reef Rainforest Fund and implementing partner University of the West Indies Centre for Resource Management and Environmental Studies (CERMES) facilitated a meeting of SocMon Regional Coordinators and other partners that was held at NOAA's Headquarters in Silver Spring, Maryland, USA.

In addition to creating the opportunity for sharing experiences across six global regions, the two and a half day planning meeting was also designed to assist us with strategic planning. Some of the goals included an assessment of current regional SocMon/SEM-Pasifika activities, support for the vision for Global Coral Reef Socioeconomic Monitoring, ways to improve integration of human dimensions monitoring with ecological monitoring, as well as moving from assessments to long term monitoring programs that support decision-making and policy.

Over the meeting period there were presentations from each of the SocMon/SEM Pasifika Regional Coordinators, input from the GCRMN (Biological) Science Coordinator, overviews of the use of SocMon indicators including trends and two days of in depth strategic planning and objective setting. This meeting report summarizes some of the activities and outcomes over the two and a half days.

2 Opening

2.1 Opening Remarks

Peter Edwards, Global Coordinator for the Global Socio-economic Monitoring Initiative (SocMon/SEM-Pasifika) welcomed participants to the two and half day Strategic Planning Meeting for SocMon. He noted the meeting was important in bringing regional SocMon Coordinators from around the globe together to meet each other, share experiences and ideas and come up with strategic plans that will help harmonize social science collection in coastal areas and coral reefs so it can be better harmonized with the ecological and biological monitoring of information.

Participants introduced themselves providing brief background profiles. In addition to SocMon regional coordinators and technical advisors, participants included persons from NOAA involved or interested in SocMon and representatives from NOAA partner agencies (RARE, WRI). See Appendix 1.

2.2 Welcome

John Christensen, Coral Reef Conservation Programme (CRCP) Manager, welcomed participants to Silver Spring. The CRCP has been involved in SocMon for over a decade and is a proud co-sponsor and participant in SocMon. There have been many changes occurring in the CRCP within NOAA. CRCP has implemented a new national coral reefs monitoring programme. The work regional coordinators has been doing over the past decade has shaped what is being done at NOAA with the monitoring programme by strategically shaping how to bring together the biological and oceanographic monitoring together with the human dimensions monitoring. SocMon has had a great impact on what is being done at NOAA. Participants were wished a successful meeting.

2.3 Welcome

Janna Shackerhoff, NOAA International Program also welcomed participants to the meeting providing some background to the Program. The NOAA CRCP International Program is primarily charged with building the capacity of coral reef managers in coral reef countries around the world in partnership with peer ministries, agencies overseas, universities, and community leaders. The CRCP provides scientific and technical expertise of the US government along with colleagues in the US State Department and USAID. One of those platforms the US government is involved in is the International Coral Reef Initiative (ICRI). SocMon evolved in parallel with the Global Coral Reef Monitoring Network – biophysical monitoring of the world’s coastal and coral reef areas that came out of ICRI. SocMon came about a few years later to complete the picture of what it is that people value about coral reef ecosystems, how people interact with ecosystems etc. As a program, CRCP has supported SocMon and worked with all regional coordinators. NFWF grants and NOAA Cooperative Agreements support SocMon. Shackerhoff mentioned that she was looking forward to seeing the new era of SocMon coming out of this meeting.

2.4 SocMon overview

Edwards provided an overview of the SocMon initiative primarily for the benefit of specially invited guests and NOAA partner agencies. This included a background to the development of the GCRMN manual used in conjunction with regional guidelines for monitoring and the reach of the initiative in terms of the regions conducting SocMon (Central America, Caribbean, Western Indian Ocean, South Asia, Southeast Asia and the Pacific Islands). He stressed that SocMon is tailored to each site’s needs. There are challenges with the implementation of SocMon. Attention needs to be paid to a way of setting up SocMon to make sure data are used in policy making and decisions.



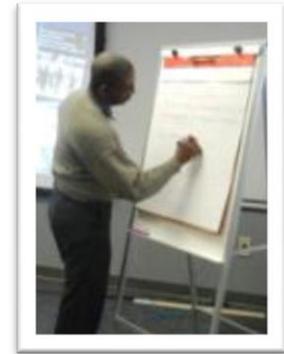
2.5 Meeting Expectations

During this session, Edwards set the stage for the meeting by day by taking participants through the agenda (Appendix 2). Day 1 would primarily be dedicated to information exchange involving sharing of SocMon experiences, forging links between biophysical and human dimensions monitoring and discussion of observed trends after a decade of SocMon implementation. The focus of Days 2 and 3 would be on strategic planning in

the near, medium and long-term, and innovations in the process including new directions for SocMon, as well as new ways of approaching and packaging the method.

Patrick McConney (CERMES) asked participants to provide their own expectations for the meeting. Expectations provided are listed below:

- Exploring relationships between SocMon and projects (such as Global Environment Facility) in the regions – linkages for monitoring.
- See other innovative monitoring techniques and share survey techniques
- Seeking collaboration to address real challenges
- Determination of examples in which SocMon has been used for decisions.
- Strengthen SocMon networking and durable partnerships.
- New methods for monitoring.
- Sharing lessons learned more.
- SocMon relationship with ICRI in the future (similar to GCRMN) - what can be gained from strengthening the link between ICRI and SocMon?
- Better integration or not?
- Better understanding of how people value oceans and seas. Value added human dimension.



3 Sharing stories from the nodes



Prior to the meeting, regional coordinators were provided with a template slide presentation to guide their stories from each SocMon region. Each presentation provided an overview of SocMon/SEM-Pasifika history in each region, typical goals and objectives for monitoring, examples of the use of SocMon in decision-making, benefits of SocMon/SEM-Pasifika, constraints or challenges to implementing SocMon/SEM-Pasifika, SocMon/SEM-Pasifika networking, new directions for SocMon/SEM-Pasifika focusing on new developments or improvements made to the methodology, regional perspectives on promoting SocMon/SEM-Pasifika in each region and a personal glimpse at each coordinator and their involvement in the methodology. The following sections outline brief notes on each presentation and discussion afterwards.

3.1 South East Asia – Michael Pido

- SocMon in Southeast Asia began via the Southeast Asia Advisory Board comprising six Board members that functioned well.
- Early on there was *ad hoc* implementation of monitoring.
- Next steps included the institutionalization of SocMon in the mid-2000s – coordinated regionally by Conservation International – Philippines (CIP) with Palawan State University (PSU) as Academic Partner
- First introductory training in 2007
- Regional coordination role moved from CIP to PSU in 2009
- Since 2009 there have been many SocMon trainings and affiliated projects. Most recent examples include trainings in the Philippines to build capacity for (1) adaptation to climate change and (2) improving fisheries law enforcement and MPA management.
- Recent (January 2014) inter-regional collaboration between Pido and Hoon (South Asia SocMon coordinator) recently is a good trend. Joint collaboration on training in SocMon for evaluating socio-economics and marine resources utilization at selected fishery communities in Myanmar.
- SocMon is mostly used for problem analysis, valuation, impact assessment, assessment of management effectiveness, verifying and documenting assumptions and establishing baselines.
- Benefits of SocMon in the SEA region are primarily information provision, capacity building and a means for the community to express their opinions.
- Difficult to determine influence of SocMon info on decisions.
- Tool for capacity building.
- The main outputs used to share SocMon information are technical reports, policy briefs and lessons learned summaries. There is a need to publish in universities and Pido has been doing this.

- Challenges to implementing SocMon are varied and include: challenge of being a volunteer leader with scarce operational funds; the university subsidises SocMon, there is no dedicated external funding for coordinators; the organization arrangements for SocMon are vulnerable and variable (high turnover and change of actors (mostly volunteers)); many other monitoring methods are similar (how SocMon stands apart from the other monitoring methodologies must be demonstrated); SocMon needs a critical mass of interdisciplinary experts (Dream Team) to cover the three areas of SocMon (development/evolution with allied methodologies, critical mass of in-house SocMon experts, more defined outputs at each stage – e.g. literature review, site profile) rather than all generalists; no funding to do the SocMon development that is necessary.

During the discussion following the presentation one participant stated that people tend to confuse the process with the tool and SocMon is a tool, the use of which depends on the aim of the socio-economic monitoring. It was further noted that persons who have participated in the process do not see the impact of their input on decisions. Pido agreed that citizens are cynical about participatory approaches due in part to the stream of NGOs. Traditional leaders call the shots in SEA as culture is very hierarchical. Not like USA. Archiving and standardizing SocMon tools will help give it identity.

Another participant asked Pido for information regarding the situations in which SocMon is scaled up or scaled down. It may not be the main tool, but one of a package of tools. Pido said that there is a hierarchy of tools and the level of consultation, collaboration, participation etc. is a factor to consider. People's opinions are not taken into account in many places.

Another participant questioned the extent to which the network would like SocMon/SEM-Pasifika to be the go-to place for decision-makers. Global Coordinator, Peter Edwards stated that decision makers need to see SocMon as a tried and tested method to be trusted and used more.

The discussion closed with a comment made by one of the SocMon/SEM-Pasifika technical advisors on the need to revise and improve the monitoring guidelines. The first SocMon guide came out in 2003 and there are several later documents. Much data have been produced by SocMon but have not been used. There needs to be a better link between the purpose of data generation and decision-making with SEM-Pasifika.

3.2 South Asia – Vineeta Hoon

- SocMon coordination in this region started with GCRMN South Asia, was continued by IUCCN Coastal Ocean Research and Development in the Indian Ocean (CORDIO) from 2003 to 2009 and most recently since 2010 lies with the Centre for Action Research on Environment Science and Society (CARESS), Chennai, India.
- Large SocMon sites in India and Sri Lanka.
- 135 persons trained in SocMon between 2002 and 2011 in trainings
- Other studies have complemented SocMon South Asia e.g. 2004 Poverty and Reefs study.

- Coalitions of young people to use SocMon.
- Mainly NGO practitioners are conducting SocMon.
- Typical goals of SocMon at South Asia sites include generating baseline information, understanding perceptions of resources and resource conditions, determining perceptions of marine protected areas (MPAs), examining dependency on resources and reef related activities, understanding anthropogenic pressures on marine and coastal resources.
- SocMon has been used a lot for in communication for awareness-raising and education activities; alternative livelihoods; provided information on artisanal fishers to Fisheries Departments; and informed management. Communications are shared with decision-makers.
- The link between data and decisions are not clear but decisions seem to be aligned with what is desirable. Some decision-makers are familiar with SocMon having participated in monitoring activities in the field.
- There have been many benefits from the implementation of SocMon in the region: formation of Adaptive Coral Reef Monitoring Network (ACRMN) by young people but now defunct due to low funding; community lobbying for the establishment of a community reserve; demand by a Fishermen's Association for banning of set net fishing and lobbying for adaptive management.
- Constraints or challenges to implementing SocMon in South Asia – funding (typically project-based), implementation largely remains a NGO effort, inter-site comparisons are difficult to make due to differing site focus.
- In terms of built SocMon networks, SocMon SA has a network of trained NGOs, government departments (e.g. Fisheries, Environment) conducting SocMon. SocMon SA has been associated with the Bay of Bengal Large Marine Ecosystem (BoB LME) project for the past three years. Networking can be strengthened by promoting SocMon as a regular component of GEF International Waters (IW) projects and programmes (e.g. LME, MPA, ICM). More sites need to be covered and follow-up maintained. The quarterly newsletter, SocMonitor, helps to keep the network alive.
- New directions for SocMon in SA have included poverty aspects and poverty risk assessments to study such in socio-economic monitoring projects.
- Suggestion to promote SocMon as a regular part of the socio-economic monitoring in LME and a component of GEF IW programmes. SocMon is more process than tool (opposite of Pido point) and needs to keep changing with issues. Country forums of SocMon practitioners would be good.

One main comment made subsequent to this presentation was agreement with the idea of better connections with GEF IW programmes and other large initiatives to better institutionalize SocMon. This would assist in leveraging funds and keeping the network alive.

3.3 Micronesia – Brooke Nevitt

- SocMon/SEM-Pasifika was implemented in Micronesia in 2009.
- It is a partnership of local, regional and international organisations – the National Oceanic and Atmospheric Administration (NOAA), The Nature Conservancy (TNC), the Micronesia Conservation Trust (MCT), Palau International Coral Reef Centre (PICRC), Pacific Marine Resources Institute (PMRI) and dozens of local conservation organizations.

- In the Micronesia region (comprising over 2,100 islands) there have been greater than 10 trainings and assessments. Over 150 people trained in the methodology.
- Goals and objectives for site monitoring vary significant but most frequent themes in assessment objectives include: evaluating management effectiveness, collecting demographic information, assessing perceived threats to sites and resources, determining the awareness of management efforts, assessing perceived changes in resources, determining dependency on resources, determining support (opposition) for sites (management sites) and assessing climate change related issues.
- SEM-Pasifika has been used most recently in decision-making in Laolao Bay, Saipan.
- Benefits of SEM-Pasifika in Micronesia include the development of Micronesia Challenge indicators and SEM-Pasifika Addendum; wide conduct of assessments in all jurisdictions (except Guam); momentum for socio-economic monitoring is building as well as support; and strong partnerships have been formed.
- The major challenge towards implementing SEM-Pasifika has been the establishment of long-term monitoring in the region. As such there is the need for an overarching plan, resources, sustained socio-economic leadership, follow-up and continued support and additional expertise.
- The SEM-Pasifika network consists of local NGOs and government agencies, regional NGOs and Universities, Federal partners as well as international NGOs.
- New directions for SEM-Pasifika have included the development of a suite of Micronesia Challenge-specific SocMon/SEM-Pasifika variables. There is a new focus on climate change indicators, the need for re-thinking the data analysis aspect of traditional SEM-Pasifika training, and focus on transitioning from one-off trainings and assessments to a regional monitoring programme.
- In terms of promoting the methodology in Micronesia, it has already been “sold”. The next steps will involve moving SEM-Pasifika in Micronesia to the next level which involves resources, developing a committed and trained team and continued support from mentors.

Following the presentation there was interest in the development of climate change indicators that had been mentioned. Supin Wongbusarakum, one of the developers of the indicators provided a brief background to their development. The addendum of indicators was developed in 2011 as an appendix to the SocMon/SEM-Pasifika regional guidelines. Climate change is becoming more important in the region. The Learning, Evaluation and Planning (LEAP) toolkit is used more than the SocMon/SEM-Pasifika climate change indicators. There is LEAP interest in the Caribbean now. There is a need to understand if and how data are being used in decision making. SEM-Pasifika is used to build community support. Momentum for socio-economic monitoring is building in the region. Site assessments are being conducted but there is a real need for a regional plan for consolidation and sustainability.

3.4 Brazil – Rodrigo Medeiros

- SocMon Brazil is set to become the newest node in the Global Socio-economic Monitoring Initiative and is still in the early stages of development. The idea for establishing the node began in 2010 with the visit of Patrick McConney (former regional coordinator for SocMon Caribbean and now technical advisor to the

node). Interest in developing the node continued through to 2012 and in mid-2013 the first introductory SocMon training workshop was held facilitated by McConney and Edwards.

- The regional SocMon node will be the Transformar Research Network instead of a single node– Centro do Estudos do Mar (CEM)-Universidade Federal do Paraná (UFPR) and Núcleo de Estudos e Pesquisas Ambientais (NEPAM)-Universidade Estadual de Campinas (UNICAMP). The network comprises four leading universities in Brazil – Universidade Federal do Rio Grande (FURG), Universidade Federal de Santa Catarina (UFSC), UFPR and UNICAMP working on numerous fisheries and MPA projects in south and southeast Brazil.
- The SocMon Brazil node will initially focus on MPAs due in part to three main reasons (1) recent evaluation of protected area policy 12 years after implementation, (2) autonomous board of management, and (3) focal point of the Transformar network. The three test sites for SocMon introduction will be three MPAs APA Anhatomirim, ESEC Guarqueçaba and ESEC Tamoios.
- Twenty-two persons were trained in the introductory SocMon workshop. It is expected that training would be extended to all SocMon sites and observers. Three to five persons per sites in addition to SocMon leaders and Instituto Chico Mendes de Conservação da Biodiversidade (ICMBio) staff.
- Goals and objectives for monitoring will vary at the proposed sites and will most likely focus on evaluating the management plan for APA Anhatomirim; organizing “Commitment Terms” for fisher families at ESEC Guarqueçaba and Tamoios. Commitment Terms are management tools for allowing traditional use in no-take protected areas. Will use SocMon to evaluate impacts of BRDs.
- The use of SocMon in decision-making in Brazil is obviously to be developed but SocMon Brazil is being planned with the intention of linking it to MPA planning and decision-making. Additionally, it will be the methodological guide for a National Plan for Monitoring Protected Areas (ICMBio). Using SocMon to build management (e.g. ICMBio) so it is closely connected to decision-making from the start.
- The benefits of SocMon will not be realized until it is initiated in Brazil but it will be a reference point for a broader perspective on monitoring protected areas. SocMon was presented in Brasilia and there is agreement to use it for community-based monitoring.
- Potential constraints or challenges to the implementation of SocMon may be attributed to budgets, dependency on the ICMBio agenda, misfit in timing (community vs. SocMon) and moving from assessment to monitoring. Partnership with government means dependency in part on the government agenda.
- In terms of envisioning SocMon networks in Brazil, the Transformar Network will be the SocMon node with connections to MPA networks, research networks and regional network. Universities, ICMBio and management boards will all be beneficial in building and strengthening the network. The network helps as a learning institution. Now networking the networks linked to MPAs.
- The publication of a Portuguese version of the GCRMN manual would be a new direction for SocMon. This is the goal for SocMon Brazil.
- Suggestions for promoting SocMon – idea of “learning communities” – using established SocMon sites as the basis for observers following-up activities at new sites.

The discussion focused on the good work that Brazil is doing. It then focused briefly on the need to decide on SocMon packaging and branding strategy or advantage in none and incorporating many methods/tools.

3.5 Central America – Arie Sanders

- SocMon in Central America started in 2005 with a regional workshop in Honduras.
- Zamorano University, Department of Environment and Development is the regional SocMon node.
- Capacity in SocMon has been built at 15 sites in Honduras, Guatemala, Nicaragua and Belize with about 90 persons (mostly intermediate staff) trained in the methodology. SocMon training has been extended to students.
- SocMon has typically focused on assessment of livelihood strategies for MPAs and the importance of fisheries for coastal communities.
- Generally SocMon data have been incorporated into MPA management plans. Mosquito coast data were used for the establishment of a new MPA. SocMon has been used to guide the WWF climate change strategy in Belize.
- Benefits of SocMon in Central America include the use of the information by co-managers, development of an awareness among co-managers about the importance of SocMon data, and inclusion in a coastal management course at Zamorano University.
- Constraints or challenges to SocMon: analysis and use of data by local counterparts, users need much help in writing reports, repeating SocMon assessments after 3-5 years (assessments but no monitoring), high turnover of trainees so there is the constant need for re-training, funding (specifically the 50% match).
- Networking has been strengthened by participating in the Caribbean Marine Protected Area Management Network and Forum (CaMPAM) project and working with CEM in the Caribbean. At the local level, the network is based on individual contacts.
- New directions for SocMon have focused on using a livelihoods approach to analyze the data. SocMon data have also been used for modeling the impacts of fisheries closures. There needs to be more linkage to the ecosystem approach. Databases are not used since SPSS and Excel expertise are required.
- Ways of further promoting SocMon could include new monitoring guides based on the livelihoods approach, further updates to the SocMon website and regional webpage, increased training at sites, and increasing SocMon awareness among various potential funding agencies (e.g. USAID).

There was a brief discussion regarding the methodologies preferred by the US Agency for International Development (USAID). Apparently, the agency does not seem interested in methodologies that promote high levels of stakeholder participation. Therefore acquiring aid is a challenge.

3.6 Caribbean – Maria Pena

- SocMon in the Caribbean was initiated in 2003 with the publication of the regional guidelines and implementation of regional and training workshops.

- The Centre for Resource Management and Environmental Studies (CERMES) at the University of the West Indies in Barbados is the regional SocMon node.
- SocMon has been implemented at 12 countries across 23 study areas comprising MPAs and coastal community sites.
- Just over 300 persons have been trained in the methodology between 2003 and 2013. However there has been high turnover of personnel at sites and therefore some loss of SocMon capacity.
- Goals and objectives for monitoring are similar to other regions and include; baseline data collection on coastal communities, informing fisheries and MPA management plans, building socio-economic profiles of fisheries and enhancing management capacity of stakeholders.
- There has been poor evidence of the use of SocMon data in decision-making. Two exceptions are the Negril Marine Park in Jamaica where data were used to inform the first fisheries management plan for the park, and the South Coast Marine Conservation Area where baseline data are being used to guide the upgrade of the MCA to park status.
- In terms of benefits of SocMon in the region, there has been a fair level of built regional capacity that can be used to sustain socio-economic monitoring programs. Additionally, promotion of the method as a practical, flexible and low cost tool has generated significant interest in its use.
- Constraints or challenges to SocMon in the region include: no sustained monitoring, limited uptake of SocMon data in decision-making, lack of fully functional integrated coastal management decision-making mechanisms in SocMon study areas, loss of regional capacity due to personnel changes, and prior work commitments and priorities of project participants.
- There is an informal regional SocMon Caribbean network through SocMon alumni. Big partners (such as GEF, Inter-American Development Bank (IDB)), regional focal points and alliances (such as Caribbean Natural Resource Institute, Caribbean Marine Protected Area Management Network and Forum, Caribbean Disaster Risk Management Reference Centre), and national focal points would be beneficial in building the SocMon network and integrating the methodology into management and decision-making.
- SocMon in the Caribbean has moved and is moving towards new directions in terms of enhancement of training, development of new variables, determination of core regional variables for monitoring, incorporation of GIS into SocMon and development of a decision-linking guide.
- There is a lot that can be done to further promote the use and uptake of SocMon in the region ranging from packaging SocMon information in various forms for delivery to policy and decision-makers, continued promotion at different fora, creation of national focal points, increased promotion among institutional stakeholders *inter alia*.

A brief discussion followed about involvement of SocMon Caribbean in the Caribbean Large Marine Ecosystem Project (CLME+).

3.7 Wrap up discussion

Following on from, and building on the coordinator presentations a lively discussion ensued about various aspects of SocMon, captured briefly in the following paragraphs.

Emphasis was placed on positioning to promote SocMon.

Edwards provided information on the Western Indian Ocean's (WIO) challenge with SocMon as a result of capacity changing. There is a pressing need to address WIO lack of a coordinator. This reinforces the ever present issue of institutional memory and continuity. SocMon needs to be institutionalized there. A suggestion was made to position SocMon WIO in the Western Indian Ocean Marine Science Association (WIOMSA). This was considered to be potentially beneficial since the former WIO regional SocMon coordinator now works with the organization. The WIO region needs attention.

Several people mentioned branding of SocMon. It was mentioned that one of the main problems in 2002 with SocMon was the branding. Those involved in developing the Initiative were trying to produce something that was recognizable and to identify a need. One participant noted that today, branding may create problems. Could promoting SocMon as a packaged product be something that could be done? It is a tool to adapt to our needs.

Participants questioned the purpose of branding since in particular SEM-Pasifika was created to avoid some branding issues. Branding at some level to have a global picture was thought to be a key issue. Building on that strength, the brand of the method or the approach standing on its own or being used in conjunction with other methods could be beneficial in attracting funding. It can enhance credibility. Branding as a method is important. One participant remembered the early challenges with branding SocMon and cautioned that it may not be good to package SocMon as it may reduce flexibility. There are pros and cons to branding. Brand SocMon as a principle to increase the uptake of socio-economic data, no matter what the method.

Depending on the main purpose for branding there are different means of getting it. Need to find the priority purpose for branding. There were several spins on this – to brand SocMon as a principle. The idea is to have a dataset that can be used and compared. If people are moving towards adaptation and flexibility then branding as a principle may be an advantage.

The question of the primary target audience of SocMon/SEM-Pasifika was raised. Coordinators and those familiar with SocMon indicated that the audience included a mixture of stakeholders. It was further noted that the method is quite simple and has been used for capacity building at the community level. How do we step it up to attract funding? This question was considered throughout the duration of the meeting with no real consensus arrived at by the end of the meeting. It will be included in the strategic plan to be developed.

With reference to promoting SocMon, the point was made that capacity has been created to use certain tools. In terms of MPAs, needs and weaknesses included working with people and implementing human dimensions monitoring at these sites. One of the most important points to this is elevation of socio-economic monitoring in management. SocMon has created opportunities and tools for technicians and managers to work with people - participatory and social science promotion.

Who do we consider as SocMon alumni? There is a certain professional process that they may have had to go through. What do we say they are capable of to warrant the brand?

There are many audiences for SocMon in terms of data gathering and outputs. May have to establish what the core indicators are and what are optional. In SocMon SEA (as in all other regions) there are technically 70 original SocMon variables to be used for monitoring. This may be a way of selling SocMon.

With respect to the frequency with which the need for core indicators were mentioned in the preceding presentations participants were warned that unless objectives are defined it is hard to pin down the indicators. The challenge of core indicators is to ensure that they are really universal. The Pacific has conducted the same core variable analysis like the Caribbean and found only a handful were core. The Pacific and Caribbean have found that common variables are demographic, which are not the key socio-economic ones for making resource management decisions. Adding to this was the comment that the GEF IW process includes a set of core socio-economic indicators (check with GEF Transboundary Waters Assessment Programme (TWAP) and obtain methodology report for sharing among coordinators). It could be interesting for SocMon to look at them in terms of which indicators have been chosen for global socio-economic monitoring indicators. If monitoring is using NOAA funding, then this agency could request that sites include the use of core variables (a few) for collection of comparable information. There is a need to consider three levels of commonality ... principles, concepts and then indicators. This would allow more alignment of the indicators by referring to the 'higher' levels.

4 Other perspectives and initiatives

4.1 GCRMN Science: Improving the links to SocMon

The aim of this after lunch session was to obtain perspectives that help to inform trends in SocMon opportunities. Professor Jeremy Jackson was a specially invited guest for this session. Jackson provided participants with a brief overview of his academic and professional background. He is Director of Centre for Marine Biodiversity and Conservation (CMBC), the William E. and Mary B. Ritter Professor of Oceanography at the Scripps Institution of Oceanography in La Jolla, California, and a Senior Scientist at the Smithsonian Tropical Research Institute in the Republic of Panama.

He further talked about his life as a scientist in many parts of the Caribbean. From his research he has seen ecosystems in Jamaica and Panama go from "pristine to catastrophes." In Jamaica he has conducted research on reefs without fish and observed rapid deterioration of Jamaica reefs. The situation is similar in Panama. The new science program of GCRMN which is multi-focused is trying to determine the factors most important to the decline. The study has been ongoing for almost three years. Emerging information indicates that factors for the decline cannot be all attributed to climate change, people are the problem. Using data from 35,000 studies of coral reefs in the Caribbean, a record of coral reef changes from the 1970s to the present has been created. The story is sad but it offers hope.

It is true that coral cover declined from 60% to less than 10% in many places (e.g. Port Royal is now 2%). The biggest problem is that in coral reef science and social sciences there is huge problem of mixing the consequences of changes with the causes of change. This leads to sloppy thinking. This includes coral bleaching and algal growth roles in changes. The most important lesson we have seen in terms of pattern is that no matter how bad things are there are exceptional locations in the Caribbean in good shape. There are exceptions from which we can learn, for example MPA off Texas and Bermuda where coral cover is good. Tourism is a major contributor to deterioration, especially beyond a threshold (and when there is no regulation). The report of this research is soon to be published. Quick synopsis: there is a strong link between coral cover and healthy parrotfish populations; pollution data are not easily available but is a major factor contributing to deterioration; a clear pattern linking global warming and the decline of reefs cannot be found; and most of the reef decline occurred before global warming was an issue (before the first major heating event).

What do you do with this information? It is tough to control fishing due to the human dimension ... poor fishers. Fishing has to be stopped in Jamaica or the reefs will not recover. The main impact there was the *Diadema* die off after the grazers were overfished. Climate change now is just noise.

The results of the research were presented at the International Coral Reef Initiative (ICRI) in Belize, October 2013. The data came from 34 countries in the Caribbean. Most of the data was sitting in various departments not having been analyzed for years. The report was used to submit a resolution at ICRI to ban fish traps, parrot fish harvest and spearfishing, simplify data collection and monitoring and link with socio-economic monitoring. It was unanimously accepted by fisheries ministers. The Netherlands has offered to host a meeting in Bonaire to follow up the ICRI declaration.

In giving his closing remarks, Jackson stated there is a crisis, "coral reefs in the Caribbean are dying. There are few places that are still healthy but it won't last for long." He stressed that real success stories and their documentation is needed – communicating information to get buy-in.

Good discussion among participants occurred after Jackson's talk. One participant stated she was depressed especially since there is enough science to know what has happened and what should be done. Jackson said that climate scientists want to argue that climate is the bad news not overfishing - shows that science is not objective.

Jackson noted that his article in Science, "Are US coral reefs on the slippery slope to slime?" got bad reaction as it challenged popular opinion. However he reiterated that it is not possible to sustain ourselves on wild food. We need to ranch fish.

One participant asked Jackson based on his experience in the Caribbean whether he could provide participants with any advice or wisdom towards finding alternatives to fishing which tend largely to be tourism -related. Jackson indicated an interest in a new kind of tourism and the fact that there is money to be made from new types of tourism. The issue is to develop a model for tourism that is ecologically responsible. Fishermen could be engaged in this.

At the end of the discussion Jackson gave a few examples that the situation is not beyond improvement. Bermuda was a mess in 1950s with heavy use of fish traps, and declining fish populations but the reefs recovered from hurricanes. Flower Garden reefs are great in the Gulf. Los Roques was good in Venezuela as the playground for the rich but declined once the poor and fishers got access to them with change in government. Places that are in fair shape can recover if you put a fence around the area e.g. Curacao or Bonaire. Control of parrotfish harvest in Belize is said to already have had positive results. Start in places where success of improvements in well-being can be shown. Replicate more responsible tourism and find alternative employment for fishers. He advised that there is a need to be realistic about basic information and solutions that are simple.

Jackson stated that the Caribbean study can be replicated in other regions led by experts from within those areas.

4.2 SocMon/SEM Pasifika indicators in the Pacific and South East Asia

Supin Wongbusarakum provided a background to her involvement in SocMon/SEM-Pasifika. Originally her academic research started research with bio-physical monitoring but she found human interactions were more important, particularly understanding the political economy of reef users.

- She had been involved in SocMon SEA in Thailand in 2004 and then became involved in SEM-Pasifika in 2007.
- Wongbusarakum explained the development of SEM-Pasifika and why SocMon was not well received in this region when it was introduced. The Pacific already had two guidebooks: The Locally Marine Managed Area Learning Framework (LMMA-LF) and Socio-Economic Fisheries Surveys in the Pacific by the Secretariat of the Pacific Community (SPC). People therefore questioned adopting SocMon. People believed that if another set of guidelines was required, then the previously developed guidebooks had to be included. As a result, a very large and extensive guidance draft was developed to include all three guidelines. The draft proved to be too difficult to use by the practitioners at its first launch. Consequently the draft was downsized and simplified. The name SEM-Pasifika was given by the steering committee from the Pacific islands to identify the guide with the region.
- Since 2007 she participated in a number of trainings in 2009 with SocMon SEA in Vietnam and Cambodia and SEM-Pasifika trainings in 2009 and 2010 at a number of sites.
- Common objectives for monitoring include: collection of demographic baseline information, especially income and occupation; determination of household dependency on marine resources (consumption and incomes); identification of threats to MPAs, coastal and marine resources; determination of awareness and perceptions to management; and examination of enforcement.
- Lessons learned from SocMon/SEM-Pasifika trainings indicate that implementation is opportunistic, depending on available funding; the process is fast and short-term empowering, especially data collection and data entry; waning capacity with one-off assessments and changes in personnel; the tool is not suitable for communities; skills in data analysis cannot be built adequately in

the short training – is it preferable to pay someone to do proper quantitative analysis?; partners are key; there has been no monitoring undertaken as yet, most sites are one-shot “monitoring”; lack of coordination with biological monitoring; lots of indicators and variables; increasing needs for climate-change related assessments; attribution of intervention to positive change (some believe that if change cannot be allotted to monitoring then it is not worth doing); balance between scientific rigour and the participatory research (globally among SocMon/SEM-Pasifika regions sampling design tends not to be scientifically robust but emphasis is on participatory research. A balance must be found between the two for uptake of data).

- SocMon has poor sampling guidance so analyses cannot be done properly.
- Making more use of a formally stated causal pathway (strategy, activities (input), intermediate results and outcome) to attribute changes to interventions made.
- Wongbusarakum mentioned that integrated monitoring, biological and socio-economic monitoring, respond to each other and are planned together. In the Pacific it is needed but it is not happening.
- She also cautioned that vulnerability assessment cannot be separated from socio-economic monitoring anymore.

Discussion after the presentation revolved around the points in the causal pathway. It was noted that there are several perspectives on this and how linear one can really claim the linkages are. Tension with probabilistic models of input to output. Query of using counterfactuals and control sites to disentangle cause and effect. Discussion of SocMon as a part of impact evaluation or not, perhaps SocMon is a component of monitoring and evaluation. Issues of externalities are not taken into account.

Another participant commented that there are ways to prove how SocMon has been integrated into decision-making. Methods are available for this. This would help to choose what and where should be monitored. Wongbusarakum agreed with this but stated that there was a need to collect success stories of how data have been used.

In terms of the balance between scientific rigour and participatory research it was pointed out that it must be remembered that there are different data gathering tools. It is more difficult to do the qualitative than quantitative. There has to be a combination of expertise. Aside from the scientific rigour it is the expertise that counts. Good results can still be obtained because of the expertise. Wongbusarakum mentioned that she is more concerned about the sampling design and believed that people were not trained to think about the sampling design. The information collected is good enough for decisions and popular publications but not to publish in academic literature. The decision on what the data is being conducted for needs to be made - academic purposes versus decision-making. This point was agreed on by participants with one stating that his training was for technicians and for MPA managers that are biologists. It was stated that it would be difficult to include the people being trained now in more scientific trainings. Edwards believed these considerations are a part of the branding that should include some scientific credibility (not outweighing decision aspects) along with useful participatory work.

4.3 General discussion

Susie Holst shared NOAA's experience with strategic planning with participants. In 2007/08 there was an external review process in which goals were evaluated for going forward in 2010/11. A part of this included how the social changes are being reflected. In general it is important to vision achievements in not just five years but 10 years. Have a solid outcome or goal. One of the things the Coral Program is working on is showing its progress. Having a way to show causal linkages is important.

She also provided participants with an overview of the National Socio-environmental Synthesis Centre (SESYNC) and its pursuit on MPAs – funded through a National Science Foundation (NSF) grant to the University of Maryland. SESYNC comprises a group working towards demystifying MPAs by examining social, ecological and management capacity data. Ecological and socio-economic data coexist in only a few sites. The pursuit is trying to pull in data to do data analysis. Currently, they have found that datasets are not comparable even within organisations. One of the outcomes of the effort is to develop an open access database. There is potential for SocMon data to be stored in that database. The pursuit provides an exciting opportunity for a home for some SocMon/SEM-Pasifika data especially at MPA sites.

5 Strategic planning

5.1 Focus question and visioning



McConney led this session in the afternoon by first asking participants whether there were any big gaps in expectations or large issues missed after listening to the presentations and discussion throughout the day. Participants included:

- Integrated monitoring
- Ultimate goal of SocMon – trying to get data for manager, assessment for site: who the clients are? (Decision-makers, institutions), Who is it for?
- Strengthening the economic component of SocMon/SEM-Pasifika

McConney led the discussion on the vision elements for SocMon/SEM-Pasifika strategic planning. He noted that during the presentations and discussions he had been struck by the like-mindedness of the group.

In order to help with the definition of vision elements, participants were asked to think about how they would like to see SocMon (however branded) in the next five years. Participants were encouraged to think of key words relating to the question, “What would you like to see as the outcome of SocMon/SEM-Pasifika in the next five years?” Participants were to think in terms of a simple message to sell SocMon/SEM-Pasifika

and were asked to come up with three to five messages. Within minutes participants were ready to share their ideas but McConney asked people to pair up with others whom they thought they did not have much in common with to share and discuss their vision elements. Each pair was then asked to combine their thoughts and come up with one outcome of about five words they agreed on.

Participants noted these outcomes on paper that were then taped to the flip chart easel for wider sharing. The group then looked for key words shared among outcomes. There was a high degree of commonality among outcomes and highlighted key words as is seen in the list below:

- SocMon/human dimensions integrated with biophysical/ecological data into decision-making, in policy and practice and in adaptive management
- EBM – balance socio-ecological systems for marine resource management
- Long-term strategy with better management, planning and tools
- Improved reefs: data, communities, policy
- Management decisions informed by sustainable integrated monitoring
- Meaningful time-series data (by site)
- An integrated socio-economic and bio-physical tool endorsed by funders
- Social, economic and ecological balance achieved through well informed governance. Increased community engagement in management decision-making

McConney told participants that the outcomes would be noted and kept in mind for exercises for Day 2. Main learning of the exercise was that participants are on the same paths.

In closing the session he told participants that there would be discussion on Day 2 about the targets and clients of SocMon/SEM-Pasifika – who are the folks that need more engagement so as to carry SocMon forward? Additionally, discussion on whether SocMon will go with the narrow brand or all-inclusiveness would be a focus.

5.2 Day 1 wrap-up

McConney told participants that all presentations had been captured on the computer and offered to share and compress them for use during Day 2. He also told presentation authors that he would welcome summaries of their presentations in 200 words for the meeting report communicating main points from the presentations. The report will be for the benefit of those at the meeting.

Edwards thanked all the NOAA staff for participating and guests from partner agencies and extended the invitation for them to meet with the group over the next two days.

6 Planning I - III

Recap of Day 1

- In recapping the activities of Day 1, Maria Pena, noted the high degree of commonality among regions in terms of SocMon/SEM-Pasifikabenefits, challenges, thinking on new directions etc.
- Interesting to see how diverse we can be as SocMon. Would like to see what we are not.
- McConney took participants through a series of slides from Day 1 by going through original expectations, additional expectations, vision elements and unfinished business and asked for any additions or whether any clarification was necessary (Appendix 3).
- Regarding the additional expectation – *SocMon relationship with ICRI in the future*- one participant, asked for clarification from on what the International Coral Reef Initiative (ICRI) is. Clarification was provided jointly from participants - self organized, recognized pressure group on coral reefs.
- Regarding the additional expectation – *New methods for monitoring* - another participant asked for clarification on what this meant and what type of methods were being referred to. McConney noted that his view would be that the group would have to decide whether there is a big change to be made or just keep adapting the method. This started a discussion on whether additional methods need to be added to the guidebook. Most participants believed additional methods are required in addition to fine tuning – develop an appendix, worksheet or check list. McConney did however remind participants that there are so many tools and toolboxes that can be used for SocMon.
- In recapping preliminary vision elements developed on Day 1, McConney suggested that unless a team effort was needed to craft the vision for SocMon, a person or small group of persons could develop the statement bearing in mind the key arrangement words – *decisions, informed, integrated management*. It was decided that the vision statement should include words such as *adaptive, coastal communities and learning*. Additionally, it should be 10 to 15 words and future oriented. All coordinators were asked to come up with vision statements for comparison on Day 3. One participant made the point that in crafting the vision, the group needed to be mindful that SocMon is expanding its focus and is not limited to coral reefs. All participants agreed to this.
- In discussing unfinished business – producers and consumers, branding strategy and size and scope – the question of how much capacity we want to build was asked. This started discussion on what Micronesia is doing in developing a core team to do the monitoring. It can change the way of SocMon.

6.1 Planning I - Barriers and blocks

In determining the obstacles or issues preventing the realization of vision elements, McConney lead the group in a quick Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis on SocMon (

After completing the SWOT, participants were asked to identify in the positive section of the wall (strengths and opportunities) key assisting factors for SocMon. Similarly, for the negative section of the wall (weaknesses and threats) key resisting factors were

identified. Assisting and resisting factors were enhanced by adding components to SWOT various elements. This is shown in parentheses (

Table 6.2).

Table 6.1). In pairs, participants thought about Strengths, Weaknesses, Opportunities and Threats of SocMon across regions and were asked to provide three of each. McConney stated the idea was to look for any emerging patterns and prioritize them within each category. Participants recorded the various elements on coloured paper coded to specific elements of the analysis and taped them to a wall for analysis. Clarifications were provided about any unclear elements of the SWOT and are noted in parentheses.



After completing the SWOT, participants were asked to identify in the positive section of the wall (strengths and opportunities) key assisting factors for SocMon. Similarly, for the negative section of the wall (weaknesses and threats) key resisting factors were identified. Assisting and resisting factors were enhanced by adding components to SWOT various elements. This is shown in parentheses (

Table 6.2).

Table 6.1 SocMon SWOT analysis

| Strengths | Weaknesses |
|--|--|
| <ul style="list-style-type: none"> • Trained SocMon partners • Existing toolbox (e.g. guides, manual etc.) • Institutional back-up [NOAA as global coordinator and regional (nodes) institutions for support] • Simple and flexible methods • Product development • Community involvement • Simple adaptive, participatory, serves as awareness building tool (outreach) • Inclusive | <ul style="list-style-type: none"> • Organisational priorities [do not favour socio-economic monitoring] • Limited use of alternative informative techniques [data collection] • Project based • Lack of global vision/directing long-term plan • Manual focuses on assessment, not monitoring • Not integrated with biophysical monitoring • Unsustained capacity [training not well used – no follow-up] • From assessment to monitoring • Biophysical and socio-economic integration [data] • Limited scope such as valuation, GIS, EBM etc |
| Opportunities | Threats |
| <ul style="list-style-type: none"> • Room for SocMon in EAF/EBM budget • NOAA funding (and other Federal) • Addresses need for incorporating communities in conservation • Sharing success stories • Upcoming coastal fishery projects • Potential for use in decision-making • Linkage with other global initiatives • Regional and global partners • Apply to other ecosystems • Links to other large networks • Links to weaknesses (eg. Discussion between biophysical monitoring | <ul style="list-style-type: none"> • Gap between assessment and monitoring [to decisions] • Lack of sustainable funding for monitoring • Business as usual, left out from important global initiatives • High turnover [personnel changes] • No or limited uptake of SocMon information for decision-making • No follow-ups after training • Funding driven • Inconsistent/unsustainable funding • Movement of trained people • Priority to biological data monitoring/budget • Funding |

Table 6.2 Assisting and resisting factors to SocMon/SEM-Pasifika

| Assisting factors | Resisting factors |
|--|---|
| <ul style="list-style-type: none"> • Sharing success stories • Linkage with other global initiatives (LME); inputs from related efforts • Institutional back-up [academic institutions, nodes and global] • [Evolving] product development [simple, flexible, ok communication] • Potential for use in decision-making [planning inclusive] | <ul style="list-style-type: none"> • Inconsistent/unsustainable funding • [Not going] from assessment to monitoring • No or limited uptake of SocMon information for decision-making • Biophysical and socio-economic integration (data) weak • No follow-ups after training |

6.2 Planning II - Strategic directions

The next step in the planning process involved deriving inspiration from the two lists of factors to determine what needs to be built upon (assisting factors) and addressed (resisting factors). The group was asked to split into pairs again to think strategically about suggested strategic actions (what needs to be done, what can help, what needs to be overcome, what would make a difference in further promoting SocMon) over a five year period to build on what is assisting and address what is resisting. After this exercise, similar strategic actions were clustered and categorized to obtain a strategic direction. Strategic actions are shown in the lists below according to seven categories.

Designing improved monitoring

- Have guiding steps on how to integrate socio-economic, biophysical and governance
- Include follow-up in monitoring plan
- Monitoring needs to respond to management needs
- Refinement/updating of existing SocMon tools
- Define what to monitor
- Improve our tools and techniques
- Identify products for development, adoption or adaptation at global level

Integrate comprehensive monitoring for decision-making

- Require integrated monitoring/data
- More explicit linkage among research/assessment, monitoring and evaluation and decision-making
- Develop procedure for follow-up [to monitoring, on trainers]
- Support strategic case studies (full circle)
- Review their approaches and incorporate
- Need to know what biophysical want

Networking for resource mobilisation

- Include biophysical people in discussion on how
- Reach out [networks]
- Be present at their meetings and other means
- Formalize linkage with regional and global organizations
- Initiate more involvement of local research and academic organizations

- Insert social science into institutions (large/small) projects; integrate research/project design

Capacity development

- Workshops for sharing experiences/making connections (e.g. EAF)
- Develop SocMon lead training (leaders, executives and decision-makers)
- International program on capacity development (universities)
- Develop SocMon training programs for decision-makers (distance learning)

Communicating to different stakeholders

- Development of scientific products [communication, literature]
- SocMon peer review (sharing and feedback)
- Write and publish
- [Create] communication products for different stakeholders
- Clearly communicate and share process, outcome and outputs successes
- Products, website, database – build and promote SocMon/SEM-Pasifika brand

Sustainable financing

- Specific budget for product development and distribution
- NOAA to fund 5 years
- Secure sustained funding

Strategic planning

- Develop 3-year proposal for SocMon
- Develop a 5-year SocMon global strategic plan
- Have a monitoring plan
- NOAA to lead in global lobbying
- Have a strategic plan
- Formal inclusion of SocMon as key component of NOAA
- Develop clear vision

6.3 Planning III - Action plans

Subsequent to the clustering of actions, McConney asked participants to switch modes and talk about the headings and columns and further test what was meant about them. What would the ideas look like on the ground in terms of projects (reasonably-sized projects)? Participants were asked to think in terms of the design principle to move towards specific actions (medium to large-sized activities). This exercise took place in plenary using slides for outlining activities (Appendix 4). The exercise took longer than originally anticipated with more detailed actions outlined for certain directions than others. Captured below are discussion points (according to strategic action) made during the exercise.

- Strategic planning – A lot of time was spent on the design criteria for the strategic plan. It was suggested that two people could draft the plan and put it in Dropbox for sharing, comments and developments. A question was asked about money for SocMon projects and money for strategic planning. Edwards mentioned there would be money for strategic planning projects – USD 20,000.

There would also be potential money for 2015 (USD 20,000 to 30,000USD) to support efforts. It was alternatively suggested that participants give input to drafting the strategic plan using the present meeting opportunity. There was an alternative suggestion to spend 2014 developing the plan and undertake the catalytic activities with Global Strategic Plan and Regional Strategic plans implemented in 2015.

McConney reinforced the necessity to develop the design criteria for specific actions.

It was stated that the strategic plan should probably be done before all the actions but McConney advised that some things may inform the strategic planning as the group looks at the products etc.

Some thought that it was necessary to note the elements of the plan (mission, vision, goal, objectives) while developing the specific actions on the slide. Each of the action columns could be core elements of the plan. McConney emphasized that most probably the strategic plan would have everything in the columns but not all of it.

McConney tried to determine if the group believed that one way to groundtruth was to look at the design criteria for each column and begin to specify what it would look like and find out there were enough criteria or if more were needed. Participants thought there were enough criteria but also noted that it would always be an iterative process. Edwards noted that all of the columns are reflective of the nodes – can prioritize in terms of a global strategic plan that will mesh with regional strategic plans – funding, communication, fixing things that need to be fixed (sampling design etc)

6.4 Wrap up review

In closing the session, Edwards reminded the group to work on their vision statements for SocMon/SEM-Pasifika. The group was also encouraged to think about pilot projects (assessments, monitoring and training) to support activities in SocMon/SEM-Pasifika regions and submit one-page project proposals for consideration. Emphasis would be given to projects incorporating repeated monitoring at past SocMon/SEM-Pasifika sites.

7 Looking Forward – new Ideas, tools, approaches

Recap of Day 2

McConney began the morning session of the last day with a review of Day 2 (Appendix 5). Day 2 was a day of process and planning that started with a SWOT analysis through to functionally determining assisting and resisting factors to SocMon/SEM-Pasifika based on the strengths and opportunities, and threats and weaknesses that had been identified. This resulted in an embryonic strategic planning process. The desired output is a simple overview document that people could understand and get direction from but at the regional level there needed to be more detailed and perhaps more intense planning. He shared his view of the global strategic plan comprising two interconnected parts - capacity development (capacity) and integrated monitoring for decision-making (improvement to system and process) - subdivided into finer and finer categories down to the level of activities. McConney reminded participants about the strategic actions

determined in group exercises the day before and their specifications (what participants thought they meant and should look like). He also reminded the group of their meeting expectations. Additionally, he strongly suggested that vision for SocMon/SEM-Pasifika should be completed by the end of the meeting, taking into account the additions from Day 1.

Following on from McConney's review, Edwards stressed that by the end of the meeting he wanted a consensus on what participants believe SocMon/SEM-Pasifika will look like in the next five years and draft material for developing a simple global strategic plan while different regions think about a similar process for individual regions. While chairing the meeting he asked for reaction to the strategic planning slide shown earlier by McConney and queried whether it reflected main items for inclusion in the planning document. There was general agreement among participants that this was the case. One participant from a NOAA partner agency made the point that a strategy with focus on coastal management would have implications for plugging into and support from larger projects.

7.1 Improved information exchange

There was some discussion on how SocMon/SEM-Pasifika information is shared among and within regions, and opportunities for improving information exchange. A valuable medium for globally sharing socio-economic information is via the SocMon/SEM-Pasifika website. However there are deficiencies in the information available from some regions, with for example, reports missing from the database. During this discussion it was revealed that some coordinators were unaware that site reports could be forwarded to the Global SocMon/SEM-Pasifika and Caribbean coordinators for upload to the website. For two regions in particular, Central America and the Pacific, reports were generally submitted to regional organizations (for example Pacific Islands Managed and Protected Areas Community (PIMPAC)), project donor agencies (for example NOAA) and study area communities.

There has been a lot of SocMon/SEM-Pasifika inspired-work conducted by students as well as journal articles. There needs to be a concerted effort to know where these are. In terms of student work, one coordinator noted there needs to be some kind of quality control regarding what is publicly accessible since there is variation in the quality of work produced. Additionally, another coordinator mentioned that many reports have been written by the communities themselves and as such are not technical and scientific.

The SocMonitor is a quarterly e-bulletin produced to share information about the Global Socio-economic Monitoring Initiative. Co-editor, Maria Pena, asked whether regional coordinators had been forwarding the newsletter through their own email contacts and listservs and whether there was the need to expand the SocMonitor email list. Most coordinators forward the newsletter to colleagues and partners. It is found to be most useful to the coordinators themselves in keeping track of SocMon/SEM-Pasifika work globally. Crucial feedback was provided by the Pacific coordinator with respect to the fact that in this region, people do not equate SEM-Pasifika with SocMon. Therefore for the newsletter to have any reach and uptake in this region, consideration should be given to including either SEM-Pasifika in the newsletter's name or a logo associated with it. This will be considered in future productions of the newsletter.

It was mentioned that there is not always a news item that can be reported on a quarterly basis from each region. The co-editors of the newsletter did not view this as a major problem since there has never been a predetermined length associated with the product. The suggestion was made to consider making connections with the GEF International Waters Learning Exchange and Resource Network (IW:Learn) for additional posting of the newsletter. Rebecca Shuford (NOAA) is to follow-up on this and provide Edwards with relevant contact information.

SocMon/SEM-Pasifika has made use of social media with the creation of a Facebook page in 2010. However, information feeds need to be made more frequently and the sharing of administration privileges needs to be determined. Facebook is generally not used among the majority of regional coordinators.

One coordinator thought that much could be learned by sharing PowerPoint presentations given during trainings and at conferences among regional coordinators. These presentations could be uploaded to the SocMon/SEM-Pasifika website or could perhaps be shared in a dropbox folder among coordinators. This idea will be further explored.

The packaging of SocMon data is crucial for information exchange and uptake. NOAA may be able to push some effort to this from the outside in terms of identifying information needs.

There is a need for webpages linked to SocMon that will give greater flexibility with respect to sharing information from other sources and partners. The SocMon/SEM-Pasifika page can thus serve in part as a clearinghouse for coastal resource human dimensions monitoring.

Greater information exchange can be achieved by channeling SocMon/SEM-Pasifika information through additional listservs including PIMPAC and Brazil PESCA (and active email group where scientists, managers and NGOs professionals who work with fisheries in Brazil jointly discuss several topics).

7.2 Web, data storage, sharing etc (Maria Dillard)

Maria Dillard, Environmental Social Scientist, NOAA Hollings Library, joined the group on the final day of the meeting to provide among other things, perspective on SocMon/SEM-Pasifika data storage and sharing, and to gain feedback from regional coordinators on their views and concerns regarding these issues. Some regional coordinators currently store data collected from SocMon/SEM-Pasifika assessments in Excel spreadsheets on personal computers. For others, the raw data remains with project partners. Additionally, some coordinators provide final site assessment reports for upload to the SocMon/SEM-Pasifika website.

Dillard thought that SocMon/SEM-Pasifika needs a central database possibly comprising a small set of core variables. She stated that coordinators could decide on the information that should be uploaded to the database. The group agreed that a central system for storing data as a backup was prudent and necessary. Coordinators

and technical advisors noted that the database needs to be simple. However, one regional coordinator raised the point about hesitancy in local communities to share the data and the need for consulting with communities about willingness to share their socio-economic information. This is an important issue to consider since in some regions, particularly the Pacific Islands and Central America, SocMon/SEM-Pasifika sites can be so small that information on entire households has been collected. It was therefore agreed that there has to be some level of sensitivity regarding the data that could be stored in the database. This started a discussion on NOAA protocols for data sharing and the philosophy on open access data sharing. Additionally, another point mentioned for consideration was with regard to determining how integrated analysis would be done. Dillard proposed to think about the database and its structure and develop a couple of options for further consideration by coordinators.

The SocMon/SEM-Pasifika website is currently managed voluntarily by Stanley Tan, World Fish Center. The Global and Caribbean Coordinators provide Tan with documents and relevant information for upload to the website. At present neither has administrative privileges over the website but greater control over the maintenance and management of the website could be beneficial in making it a more effective medium of sharing human dimensions information. One query was whether all coordinators could get access administratively to the website. The way to handle this will have to be evaluated. One additional suggestion for improving the website was to translate the webpages into Spanish and Portuguese.

7.3 Capacity building, needs, realistic expectations

Throughout discussions during the meeting the notion of expanding SocMon/SEM-Pasifika was common. This extended to some coordinators belief that there is a need for additional appendices/addenda to the SocMon/SEM-Pasifika guidelines and GCRMN manual or indeed additional guides on sampling design, tools for scaling up monitoring to the national level, for urban management, regional planning etc. While the method can be adapted, and appendices can be created, consideration should be given to the fact that coordinators are already taxed quite a bit with respect to their SocMon/SEM-Pasifika responsibilities. Additionally, SocMon/SEM-Pasifika is a compact methodology. The point was made that when other tools are needed, then they could be used in combination with SocMon/SEM-Pasifika, for example the Sustainable Livelihoods Enhancement and Diversification (SLED) approach. The methodology can be used in the context of what fits with the philosophy. SocMon/SEM-Pasifika is a reference strategy that can be incorporated into many approaches including Ecosystem Based Management (EBM).

In the context of the Caribbean, capacity in terms of numbers of persons trained in SocMon within the region has been high (just over 300 persons since 2003) however changes in personnel impacts this capacity. A regional network comprising national focal points needs to be developed. It should be noted that this challenge regarding frequent changes in personnel is pervasive among all SocMon/SEM-Pasifika regions.

7.4 New partnerships

In moving SocMon/SEM-Pasifika forward, it is obvious that partnerships with global initiatives, projects and international organizations are critical to uptake and

sustainable monitoring. Partnerships with the Global Environment Facility (GEF), USAID, the Large Marine Ecosystem (LME) projects and others were proposed by the group and should be sought. The Global Coordinator will work with relevant agencies to determine feasibility of such linkages.

Recently it was learned that the SocMonWestern Indian Ocean (WIO) institution, Coastal Oceans Research and Development in the Indian Ocean (CORDIO) can no longer support SocMon activities in the WIO region. This has the potential to hinder progress made with socio-economic monitoring in this region. In light of this, the SocMon South Asia Coordinator, Vineeta Hoon, contacted former WIO Coordinator, Innocent Wanyonyi, now with the Western Indian Ocean Marine Science Association (WIOMSA) regarding that institution's interest in becoming the SocMon WIO institutional node. Global Coordinator, Peter Edwards, is to follow-up with Wanyonyi regarding that possibility.

7.5 SocMon “Branding”

No definitive decisions on branding SocMon/SEM-Pasifika were made during the meeting but there was discussion relevant to marketing the methodology that included:

- The need for a strong vision statement.
- Determination of SocMon/SEM-Pasifika intersectoral applicability - EBM, high biodiversity/hotspot areas, high vulnerability, economic sectors, coastal communities, fisheries, oil and gas.
- Application to monitoring at the national level (SocMon/SEM-Pasifika is site-based), for example, as an approach for national fisheries monitoring

8 Closure

8.1 Other items to discuss

Before closing the meeting, participants were given the opportunity to raise points for discussion.

A draft vision statement for the Global Socio-economic Monitoring Initiative was agreed upon by all participants and is as follows:

“SocMon/SEM-Pasifika as the adopted global methodology for integrated socio-economic monitoring that contributes to adaptive coastal management.”

Edwards reminded the group about upcoming funding opportunities through NOAA of up to approximately USD 20,000. He mentioned that there could be some re-direction of funds based on projects submitted in the latest National Fish and Wildlife Foundation (NFWF) call for proposals. Funding emphasis will be given to projects that focus on repeat monitoring at previous SocMon/SEM-Pasifika sites. He also noted that the funds may not be able to stretch to all six regions in the first instance. Regional coordinators are expected to submit one-page project proposals (project title, principal investigator(s), rationale, objectives, deliverables etc.) for funding before mid-March. Those regions that have already applied for funding through NFWF need not produce concept papers.

Other points raised included:

- The query of why there is no SocMon/SEM-Pasifika assessment in the US. Edwards said the methodology has been used in the outside territories but not on the mainland since it was developed for small coastal communities.
- The SocMon/SEM-Pasifika vision has been left very broad. The issue was that if the group felt the method should “not be everything to everyone” then this should be covered in the vision. There was the feeling that the draft vision did not reflect this. In response to this, an additional point was that if SocMon/SEM-Pasifika is site-specific then national initiatives will not focus on and use the methodology.
- In response to a request for clarification on implementing SocMon/SEM-Pasifika at the national scale, Edwards stated that in moving towards this there should be a few core variables and questions for comparability.

8.2 Meeting evaluation

Participants felt the meeting was beneficial in setting the direction towards a global strategy for SocMon/SEM-Pasifika. The representative for the new Brazil node found the information shared by regional coordinators would help with the soon-to-be implemented new node.

8.3 Closing Remarks, – Peter Edwards

In closing the meeting, Edwards said that in the past two days there had been lots of thoughts for consideration for strategic planning for the global initiative and looking forward including:

- Development of a Gant chart - a SocMon global workplan for 2014. Could be reasonable output for 2014 (immediate steps).
- Development of a draft global strategic plan.
- Development of accompanying regional strategic plans.
- Improvements in communication and dissemination of information.
- Database architecture.
- Follow-up with USAID, LME and other partners.
- Lots of unfinished business. Asks for coordinators to email any thoughts.

McConney and Pena informed the group that a Dropbox folder would be created to share all meeting information including presentations, outputs and photos. Additionally, the draft meeting report would be available in about two weeks for review and work on the production of the video for the planning meeting would be started.

Edwards thanked everyone for taking the time to attend the meeting.

9 Appendices

APPENDIX 1 LIST OF PARTICIPANTS

CHRISTENSEN, John
Director
Coral Reef Conservation Program
NOAA | National Ocean Service
1305 East-West Highway, SSMC4, Office 10410
Silver Spring, MD 20910
Phone: 301.713.3155, X 170
Email john.christensen@noaa.gov

CID, Gonzalo
International Affairs Specialist
International Programs Office
US Department of Commerce, NOAA
1315 East-West Highway, Room 5709
Silver Spring, Maryland 20910
USA
Phone (301) 713-3078 ext. 131
Email Gonzalo.Cid@noaa.gov

DILLARD, Maria
NOAA Hollings Marine Laboratory
National Centres for Coastal Ocean Science
Charleston SC
843.762.8929
JHT Incorporated
Phone
Email maria.dillard@noaa.gov

EDWARDS, Peter E.T.
Natural Resource Economist and Social Science
Coordinator
Coral Reef Conservation Program
IMSG - NOAA/NOS, Office of Ocean and Coastal
Resource Management
1305 East West Highway, SSMC4, Room 10417
Silver Spring, MD, 20910
Phone (301) 563-1145
Email peter.edwards@noaa.gov

FREW, Scot
NOAA International Program Office
1315 East West Highway, SSMC3 Room 5638
Silver Spring, MD, 20910
Phone 301-713-3078
Email scot.frew@noaa.gov

HOON, Vineeta
Managing Trustee
Centre for Action Research on Environment
Science and Society (CARESS)
Chennai Area, India
Phone (919) 444 368457 (mobile)
Email vineetahoon@gmail.com
SHACKEROFF, Janna

JUNGWIWATTANAPORN, Megan
Research Analyst
Ocean and Coastal Policy
Duke Nicholas Institute for Environmental Policy
Solutions
1201 New York Avenue NW
Suite 1110
Washington, DC 20005
Phone (202) 524-4991
Email mvj3@duke.edu

McCONNAY, Patrick
Senior Lecturer
Centre for Resource Management and
Environmental Studies (CERMES)
The University of the West Indies
Cave Hill Campus, Barbados, W.I.
Phone (246) 417-4725
Email patrick.mcconney@gmail.com

NEVITT, Brooke
Science Communications Coordinator
Pacific Marine Resources Institute (PMRI)
PMB 1156 PO Box 10003
Saipan, MP 96950
USA
Phone (670) 285-5880
Email brookenevitt@gmail.com

PEARCE, Monica
Associate, Conservation Research and Monitoring
RARE
1310 N. Courthouse Road, Ste. 110
Arlington, Virginia 22201
USA
Phone (703) 522-5070 ext. 140
Email mpearce@rare.org

PENA, Maria
Project Assistant
Centre for Resource Management and
Environmental Studies (CERMES)
The University of the West Indies
Cave Hill Campus, Barbados W.I.
Phone (246) 417-4727
Email maria.pena@cavehill.uwi.edu

PIDO, Michael D
Vice President for Research and Extension
Palawan State University
Tiniguiban Heights, Puerto Princesa City
5300, Palawan, Philippines
Phone (+63-48) 434-9524
E-mail mdpido@yahoo.com

SHACKERHOFF, Janna
International Coordinator,
NOAA Coral Reef Conservation Program
1305 East West Highway, SSMC4, Room 10405
Silver Spring, MD, 20910
Email janna.shackeroff@noaa.gov

SANDERS, Arie
Department Head
Socioeconomic Development Environmental
Sciences Department
University of Zamorano
Apartado Postal 93
Tegucigalpa, Honduras
Central America
Tel (504) 287-2002 ext. 2448
Email asanders@zamorano.edu

SHUHFORD, Rebecca
Fishery Biologist
Marine Ecosystems Division
US Department of Commerce
National Marine Fisheries Service
Office of Science and Technology
1315 East-West Hwy, #12660
Silver Spring, MD 20910
Phone (301) 427-8175
Email rebecca.shuford@noaa.gov

WAITE, Richard
Associate
People and Ecosystems Program
World Resources Institute
10 G Street, NE
Washington, DC 20002 USA
Phone (202) 729-7734
Email rwaite@wri.org

WONGBUSARAKUM, Supin
The Nature Conservancy
1565 Alencastre Street
Honolulu, HI 96816, USA
Phone (808) 463 4686
Email supinw@gmail.com

APPENDIX 2 MEETING AGENDA



**Strategic planning meeting for the Global Socioeconomic Monitoring Initiative for Coastal Management (SocMon/SEM Pasifika)
NOAA Headquarters, Silver Spring, 25-27 February 2014**

DRAFT AGENDA

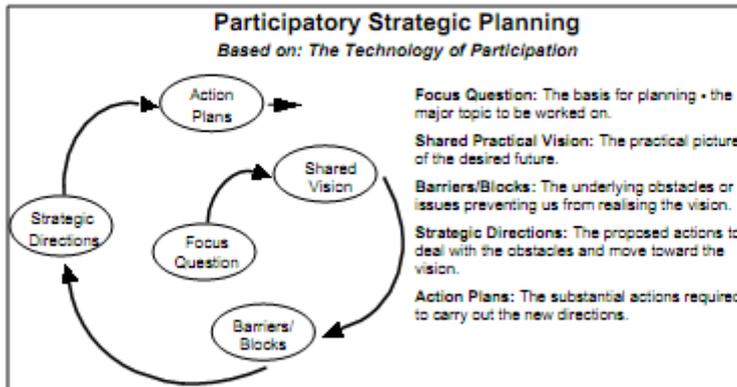
Day 1 "Information Exchange" Tuesday, February 25, 2014

Venue NOAA Silver Spring Campus, 1305 East-West Highway, Silver Spring MD, 20910

- 8:45 Participants arrive security check if relevant, get settled, etc.
- 9:00 Opening Remarks – Peter Edwards (big picture, aims, objectives, expected outputs)
- 9:05 Welcome – John Christensen/Jennifer Koss - CRCP Manager/Deputy
- 9:10 Welcome – Janna Shackeroff - International Program
- 9:15 Housekeeping – Facilities, Coffee Breaks, Other Logistics
- 9:20 Meeting Expectations – Peter Edwards (Go through agenda, overall objectives, outputs etc, short discussion – individual expectations per participant)
- Sharing stories from the nodes (15 minute presentations with 3 minutes Q/A if needed)
- 9:30 South East Asia – Michael Pido
- 9:50 South Asia – Vineeta Hoon
- 10:10 COFFEE BREAK
- 10:30 Micronesia – Brooke Nevitt
- 10:50 Brazil– Rodrigo Medeiros
- 11:10 Central America – Arie Sanders
- 11:30 Caribbean – Maria Pena
- 11:50 Wrap up including a discussion about WIO, overview of the nodes and shared challenges.
- 12:30 LUNCH
- 1:30 GCRMN Science: Improving the links to SocMon – Jeremy Jackson
- 2:00 SocMon/SEM Pasifika indicators in the Pacific and South East Asia, trends, findings etc –Supin Wongbusarakum

2:20 General Discussion (recap the presentations, red flag issues)

3:00 Coffee Break



3:20 Global SocMon focus question and visioning –What do we see when we think of SocMon/SEM Pasifika 5 years from now? What do the accomplishments look like?

4:30 End of Day 1; homework on strategic planning for each node/region

Day 2 "Strategic Planning" Wednesday February 26, 2014

Venue NOAA Silver Spring Campus, 1305 East-West Highway, Silver Spring MD, 20910

9:00 Recap from yesterday, any comments, queries etc.

9:10 Planning I - Barriers and blocks to achieving the vision elements; detail on assisting and resisting factors based on the information exchanged

10:10 COFFEE BREAK

10:30 Planning II - Strategic directions for overcoming the barriers, addressing the assisting and resisting factors, and achieving the vision elements

12:30 LUNCH

1:30 Planning III - Action plans for Years 1 and 2 of the strategic plan period setting out details for implementing the strategic directions using the FY14 budget support, network resources etc.

3:00 COFFEE BREAK

3:20 Wrap up review: combine planning I, II and III activities outputs, discuss, fill gaps, refine, budget, etc.

4:30 End of Day 2; homework on new directions, innovations and marketing SocMon

Day 3 "Innovation" Thursday February 27, 2014

Venue NOAA Silver Spring Campus, 1305 East-West Highway, Silver Spring MD, 20910

9:00 Recap Day 2, Overview of Strategic Plan

9:10 Looking Forward – New Ideas, tools, approaches

- Improved information exchange
- Web, data storage, sharing etc (Maria Dillard)
- Capacity building, needs, realistic expectations
- New partnerships,
- SocMon "Branding"

10:10 COFFEE BREAK

11:00 Other items to discuss – Publications including peer reviewed products, other funding opportunities, widening the network, strengthening the network. Etcetc

12:00 Closing Remarks, meeting evaluation – Peter Edwards
Thank You - Janna Shackeroff or Scot Frew

12:30 LUNCH

End of Meeting; people depart or are on their own for the rest of the day

APPENDIX 3 EXPECTATIONS AND VISION (DAY 1 RECAP)

Expectations and bits of vision

Some Day 1 outputs

Expectations

- Exploring relationships between SocMon and projects (such as Global Environment Facility) in the regions – linkages for monitoring.
- See other innovative monitoring techniques and share survey techniques
- Seeking collaboration to address real challenges
- Determination of examples in which SocMon has been used for decisions.
- Strengthen SocMon networking and durable partnerships

More expectations

- New methods for monitoring
- Sharing lessons learned more
- SocMon relationship with ICRI in the future (similar to GCRMN) - what can be gained from strengthening the link between ICRI and SocMon. ...Better integration or not?
- Better understanding of how people value oceans and seas. Value added human dimension.

Bits of vision

- SocMon/human dimensions **integrated** with biophysical/ecological data into **decision-making**, in policy and practice and in adaptive **management**
- EBM – balance socio-ecological systems for marine resource **management**
- Long-term strategy with better **management**, planning and tools
- Improved reefs: data, communities, policy
- Management **decisions** informed by sustainable **integrated** monitoring

More bits of vision

- Meaningful time-series data (by site)
- An **integrated** socio-economic and bio-physical tool endorsed by funders
- Social, economic and ecological balance achieved through well **informed** governance. Increased community engagement in management **decision-making**
- *Some key arrangement words*
 - *Decisions, informed, integrated, management*

Unfinished business

- SocMon/SEM Pasifika
 - By whom? ... the producers
 - For whom? ... the consumers
- Branding strategy
 - Distinct brand and packaging
 - More generic and inclusive
- Size and scope
 - SocMon rules ... part of a suite
 - Nodes loosely linked ... focus on networks

APPENDIX 4 STRATEGIC DIRECTIONS (DAY 2 RECAP)

Strategic directions and action group exercise outputs

Some Day 2 outputs

Strategic Planning

- Global SocMon Strategic Plan
- 5 Years from 2014
- Participation among SocMon Nodes
 - Who creates plan? "We" do (ie regional coordinators and advisors)
 - Information needs – link to large funders and institutions plans
- Simple, straightforward, 10-pager

Sustainable financing

- Source additional funding agencies, foundations, private donors
- Programmatic financing
- In-kind contributions

Communicating to different stakeholders

- Communications needs assessment, strategy and plan
 - Define stakeholders (funders, research institutions etc)
- Communication team/partners (eg. Panos Caribbean)
- SocMon video

Capacity development

- Internal and external consulting
- Assess capacity between training vs. hiring experts
- Information
- Tools
- Multi-level programme (linked with institutions)
 - SocMon basic, SocMon advanced
- Areas of capacity building – stakeholder communication, data interpretation, adaptation, data analysis, survey research design, facilitation skills, physical resources (delivery stream)
- Linkage to networks, key reference people to assist SocMon trainers

Networking for resource mobilisation

- Pre-requisite is SocMon stories
- Tools (e.g. SocMonitor) that can serve networking process
- Demonstration sites for lobbying, leverage and promotion (CTI, BOBLME)
- MOUs, agreements etc. (node-specific???)
- Internal resources among coordinators

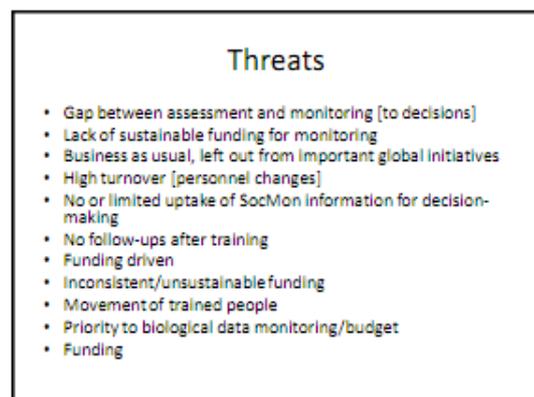
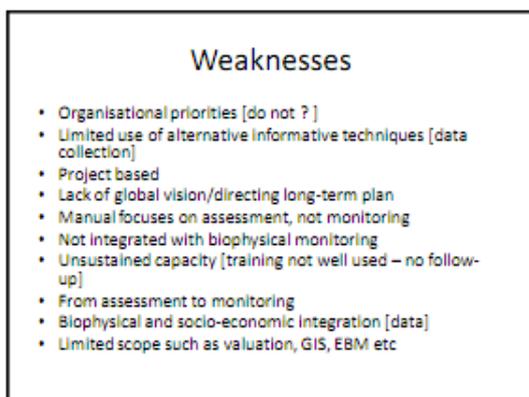
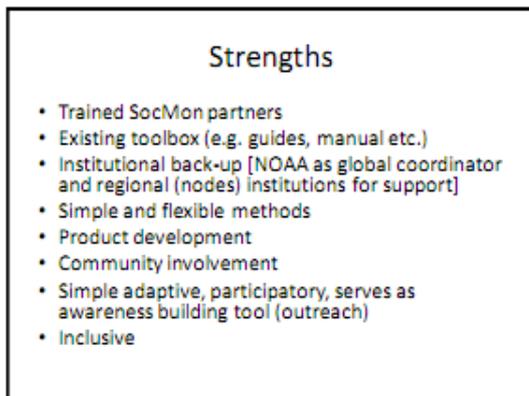
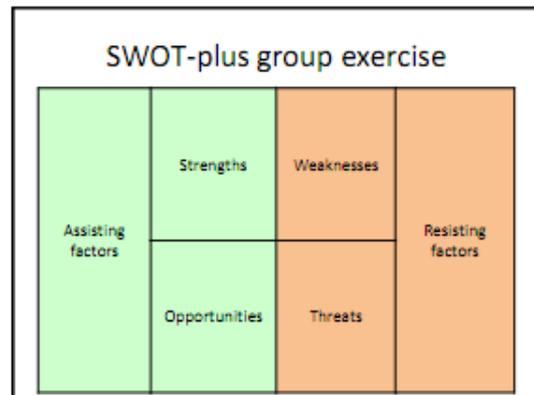
Integrate comprehensive monitoring for decision-making

- Link with preferred biophysical methodologies
- Assess if biophysical partners/institutions exist
- Expand site coverage/repeated monitoring per region
- Develop learning resources
- Case studies of integration
- Workshop of multi-disciplinary team to develop integrated monitoring plan
- Research questions or decision/demand led

Designing improved monitoring

- Assess whether monitoring should take place and by whom
- Look at design of manual and review techniques in GCRMN manual and include in monitoring
 - by core team
 - Expertise required
 - Addendum/appendices
 - electronic process
 - survey monkey (evaluation)
 - 3 months to 1 year
- Make the connection between assessment, monitoring and management
- Develop a tool to guide monitoring
- Products wish list

APPENDIX 5 SWOT ANALYSIS (DAY 2 RECAP)



Assisting and resisting factors

Assisting

- Sharing success stories
- Linkage with other global initiatives (LME); inputs from related efforts
- Institutional back-up (academic institutions, nodes and global)
- [Evolving] product development (simple, flexible, ok communication)
- Potential for use in decision-making (planning inclusive)

Resisting

- Inconsistent/unsustainable funding
- [Not going] from assessment to monitoring
- No or limited uptake of SocMon information for decision-making
- Biophysical and socio-economic integration (data) weak
- No follow-ups after training

Global strategic plan (enabling)

Strategic planning

Capacity development

Integrate comprehensive monitoring for decision-making

Sustainable financing

Networking for resource mobilisation

Designing improved monitoring

Communicating to different stakeholders