

Socioeconomic Monitoring Guidelines for Coastal Managers in Pacific Island Countries (SEM-Pasifika) Training Workshop

September 28-October 2, 2015

Tumon, Guam



Training Report

Written by

Brooke Nevitt, Micronesia Islands Nature Alliance (brookenevitt.mina@gmail.com)

Supin Wongbusarakum, NOAA (supinwongbusarakum@noaa.gov)

Marybelle Quinata, NOAA (marybelle.quinata@noaa.gov)

Guam Participants:

Nelmar Cruz, University of Guam
Val Brown, Pacific Islands Regional Office, NMFS, NOAA
Paul Lazarra, University of Guam
Anna Simeon, Bureau of Statistics and Plans
Ashton Williams, University of Guam
Andrea Hershberger, Bureau of Statistics and Plans
Allison Miller, National Park Service
Julie Hartup, Micronesia Conservation Coalition
Adrienne Loerzel, National Ocean Service, NOAA
Jolly Ann Cruz, Micronesia Islands Nature Alliance
Brenda Atalig, Bureau of Statistics and Plans - Guam Coastal Management Program
Joe Quinata, Humatak Community Foundation
Marie Auyong, University of Guam Sea Grant
Jane Dia, Guam Division of Aquatic and Wildlife Resources
Carlotta Leon Guerrero, Ayuda Foundation

Trainers:

Supin Wongbusarakum, Ecosystem Sciences Division, Pacific Islands Fisheries Science Center, NOAA
Marybelle Quinata, Pacific Islands Regional Office, NMFS, NOAA
Brooke Nevitt, MINA

Trainers in Training (*Members of Micronesia Challenge Core Socioeconomic Monitoring Team except participant from Hawaii*):

Shirley Koshiba, Palau International Coral Reef Center
Bertha Reyuw, Yap Community Action Program
Kriskitina Kanemoto, Chuuk Conservation Society
Angel Jonathan, Conservation Society of Pohnpei
Bond Segal, Kosrae Conservation Safety Organization
Mark Stege, Marshall Islands Conservation Society
Rachael Nash, Micronesia Challenge
Erin Zanre, Hawaii Division of Aquatic Resources

Acknowledgements:

This workshop was made possible through the generous support of The Nature Conservancy (TNC), Micronesia Conservation Trust (MCT), and National Oceanic and Atmospheric Administration (NOAA).

Photos of Guam workshop courtesy of Angel Jonathan and Brooke Nevitt.

Workshop Summary

SEM-Pasifika is a set of socioeconomic monitoring (SEM) guidelines developed specifically for coastal managers in Pacific Island countries. Since its launch in 2008, several SEM-Pasifika trainings have been conducted throughout Micronesia. Assessments have taken place in the CNMI, Palau, the Marshall Islands, Chuuk, Pohnpei, Kosrae and Yap in the Federated States of Micronesia. From September 28 through October 2, 2015, through the support of NOAA, TNC, MCT, and MINA Guam was host to the island's first SEM-Pasifika training. Trainees included participants from Guam local government agencies, federal government agencies, community-based NGOs, and the University of Guam.

The Guam Socioeconomic Monitoring Guidelines for Coastal Managers in Pacific Countries (SEM-Pasifika) training workshop is one in a series of ongoing trainings that have been facilitated throughout the region to build capacity of coastal management and conservation partners to understand, appreciate and implement socioeconomic monitoring in their home jurisdictions.

While addressing the main components of the traditional SEM-Pasifika training, workshop activities were adjusted under certain circumstances. In Guam, the socioeconomic assessment that is being developed for Merizo under NOAA's Habitat Blueprint project in the Manell-Geus watershed is being coordinated by the local NOAA team with guidance from Supin Wongbusarakum. As a result, NOAA is currently going through the Office of Management and Budget (OMB) standard review process with support from NOAA's National Coral Reef Monitoring Program. OMB must review and approve NOAA's proposed socioeconomic assessment study, which plans to use a household survey questionnaire, key informant interviews and focus group discussions. As a result, it was not feasible to develop a survey, implement it, analyze it and report back on it during the training. Instead, the draft survey questionnaire was extensively reviewed and pretested by the entire team during the workshop, followed by a facilitated discussion on revision points based on the pretesting, review of results, and critical feedback.

During the Guam workshop, the trainers took the Guam participants through the steps of conducting a socioeconomic monitoring assessment using real and hypothetical situations. Hands-on activities were a critical aspect of the week long training as the team was lead through the steps of developing, implementing, and communicating a socioeconomic assessment. Special attention was paid to areas of need as identified through the capacity assessment survey¹ developed by Trainer Supin Wongbusarakum prior to the workshop.

The training was led by Supin Wongbusarakum (NOAA), Marybelle Quinata (NOAA PIRO, Guam Office), and Brooke Nevitt (MINA). These trainers were supported by the newly formed Micronesia Socioeconomic Monitoring Team made up of representatives throughout the region. Having experience in facilitating socioeconomic assessments in their home jurisdictions, the team members served as trainers-in-training. They continued to develop skills essential to growing SEM in their islands as well as shared experiences and knowledge with Guam partners.² Each trainer-in-training selected two sessions

¹ Wongbusarakum S. 2015. *Socioeconomic Monitoring Capacity Needs Assessment Survey*. Joint Institute for Marine and Atmospheric Research, University of Hawai'i at Mānoa, Coral Reef Ecosystem Program, Ecosystem Sciences Division, Pacific Islands Fisheries Science Center, National Oceanic and Atmospheric Administration, Honolulu, Hawai'i, USA

(such as steps of conducting an assessment and communicating results) for which they were responsible to lead. Trainers-in-training worked in teams to develop session plans that included a presentation and activity to embed SEM topic being presented. This was the first time such an approach has been implemented for SEM in Micronesia. Through this process, trainers-in-training built their working knowledge of SEM as well as facilitation skills to train others in SEM-Pasifika process in their jurisdictions or other in the region.

For the training, the following objectives and outcomes were identified:

Objectives:

- To build socioeconomic monitoring capacity of the participants based on SEM-Pasifika
- To validate and address prioritized areas of need based on the August 2015 socioeconomic monitoring capacity building needs assessment survey
- To pretest and critically review the DRAFT Manell-Geus household survey
- To conduct initial training of enumerators
- To build skills of regional Socioeconomic Monitoring Team through “Training-of-Trainers” activities

Outcomes:

- Participants trained to undertake a socioeconomic assessment and deepen their knowledge and abilities in the areas identified in the SEM capacity needs assessment survey (including developing indicators, key informant interviews, and using results for adaptive management)
- Validated survey results of socioeconomic monitoring capacity development needs
- Greater understanding and appreciation of socioeconomic monitoring as an important tool to improve site management of the coastal and marine areas in the Pacific region
- Commitment of the participants to future SEM-Pasifika activities with the possibility of sharing information and skills with the greater PIMPAC regional group
- Regional socioeconomic monitoring team has gained skills through Training of Trainers during the workshop

Day 1:

The first day after trainees signed in, Valerie Brown (NOAA PIRO, Guam Office) welcomed the group with opening remarks. Brown introduced NOAA's Habitat Blueprint project and emphasized the importance of SEM in a site like Manell-Geus to address the project objective of improving livelihood and community engagement. She also highlighted the importance of building the capacity of Guam partners to increase the support for Habitat Blueprint and grow SEM on Guam. Following the welcoming remarks, participants and trainers introduced themselves and then participated in an activity during which they worked together to develop ground rules and shared expectations for the week training.

Brooke Nevitt then walked everyone through the objectives and expected outputs for the workshop after which Marybelle Quinata led a review of the workshop schedule.



Trainer Supin Wongbusarakum delivers a presentation

After the schedule overview, Supin Wongbusarakum gave a presentation on what socioeconomic monitoring is and why it is important. This presentation was followed by a review of the results of the socioeconomic monitoring capacity building needs assessment survey that was developed and analyzed by Wongbusarakum with the MC core SEM team members and Guam participants. The results of this survey helped to inform the development of

the agenda and efforts were made to address critical needs that were identified.

To help Guam participants understand SEM as a tool and how it's used in Micronesia, partners shared case studies of socioeconomic work taking place in their jurisdictions. Shirley Koshiba presented on work in Palau and Brooke Nevitt presented on work in Laolao Bay, Saipan. Koshiba and Nevitt explained the process they went through to develop a socioeconomic assessment, what indicators they selected, highlighted some results and shared successes and challenges that came about through the work.

The case studies were followed by a presentation by Nevitt on the importance of consulting with stakeholders in the development of socioeconomic monitoring. She then went on to lead an activity which focused on an overview of the socioeconomic monitoring process as laid out in the SEM-Pasifika guide. Following the activity, a visual guide was placed on a door of the workshop outlining SEM steps. When the training team moved on to the next step, the arrow was moved along to the current stage.



Steps of conducting a socioeconomic assessment

After going over the steps of conducting a socioeconomic monitoring project, trainers-in-training Shirley Koshiba, Kriskitina Kanemoto, and Mark Stege gave a presentation on defining assessment objectives. Their presentation was followed by an activity where participants were broken into groups, given a scenario to work through the process and practice developing their own assessment objectives.

The day closed with a review of the next day's schedule, daily monitoring feedback session with one trainer and one trainee, and debriefing with trainers and trainers-in-training. The training group supported the addition of reviewing Key Learners' Objectives. This daily activity was developed for the whole group to kick off morning activities and end the day by checking to see if objectives were met.

Day 2:

The second day started with a recap of the previous day by two participant volunteers. After the recap, participants listened to a presentation on the main SEM-P indicators by trainers in training Angel Jonathan and Rachael Nash. They briefly reviewed SEM-P indicators chart and how it can be used when selecting indicators for SEM assessment. The presentation was followed by an activity where participants had the opportunity to review indicators in the guide and think critically about them while selecting which would be appropriate for the scenario assigned to their team.

After going through the main indicators in the SEM-P guidebook, Nevitt led an activity that introduced the Climate Change indicators and Micronesia Challenge indicators which are addendums to the main guide. After a brief overview of the two attachments, participants were given time to look through both addendums and identify indicators that would be applicable to their work. They then shared their choices with their table and discussed their various selections.

After reviewing and discussing the variety of indicators available through the SEM-P guide and its addendums, Wongbusarakum gave a presentation on characteristics of good indicators and how to develop them. Following the in-depth presentation participants were led in an activity where they practiced developing their own indicators. During this discussion, Wongbusarakum reminded group that the process of selecting indicators is a good way to cross-check assessment objectives.



Participants and trainer discuss indicators

Following the indicator session, trainer in training Erin Zanre gave a presentation that went over the various steps of preparing an assessment. To do this she used the acronym S-A-R-P-A-W to highlight the steps: **S**chedule and budget, **A**ssemble assessment team, **R**econnaissance visit, **P**opulation sampling, **A**nalyze audience, and **W**orkplan. Each step was explained and she gave special emphasis to the often challenging aspects of selecting your sample method and size. Zanre led two activities during her presentation, the first was to figure out the sample size of a given population and identify the confidence level and interval. The second activity was to figure out what would be the best sampling method for various given scenarios.

Following Zanre's presentation the group went the plus/delta activity, recapped the Key Learners' Objectives, and reviewed the next day's agenda before wrapping up Tuesday's training. The trainers debriefed on Day 2.

Day 3:

On Wednesday, the training began with a review of the previous day followed by a presentation by Wongbusarakum on free, prior, and informed consent (FPIC), ethical principles when conducting field research with human subjects, and a common institutional review board process. The presentation was followed by a large group discussion of some of the issues that come about through SEM work such as how to best deal with sensitive questions, compensation of survey participants, intellectual property, pros and cons of publishing socioeconomic studies, and other potential challenges.

Following the presentation and discussion on ethics and SEM, trainer in training Bond Segal gave a presentation on collecting data and data collection methods. Segal went over the steps associated with data collection and reviewed the various data collection methods laid out in the SEM-P guidebook.

After the review of overview of data collection methods, Wongbusarakum gave another presentation on advantages and disadvantages of surveys, focus group, key informant interviews, and field observation. A video on how to conduct a good interview was shown. She also provided links to other online videos that provide excellent overview of the field data collecting methods to guide and inform SEM.

The final activity of the day was to practice conducting key informant interviews. The trainees broke into pairs with the regional trainers-in-training, formulated interview questions based on guiding topics provided by Wongbusarakum, and then Guam participants conducted key informant interviews with regional trainers to gain an understanding of their work with the Micronesia Challenge and socioeconomic monitoring. To wrap up, Quinata ran plus/delta activity and training team debriefed on Day 3.

Day 4:

The fourth day of the training began with a review of the previous day followed by a presentation by trainer Marybelle Quinata and trainer in training Bertha Reyuw on communicating results. Their presentation focused on creating a communications plan and considerations was followed by an activity where participants were broken up into small groups, provided a scenario, audience type, and analyzed data results from household surveys. For the activity, participants identified what communication methods they would use and key messages to share the assessment results to their audience. This presentation and activity was followed by the next step in conducting a socioeconomic assessment, using results for adaptive management.



Activity break out group discusses alternatives for adaptive management

Koshiba, Kanemoto and Stege gave a presentation on adaptive management and shared examples from around Micronesia to illustrate different ways adaptive management has been used and emphasized present practices. After their presentation they led an activity based on previous survey results for participants to consider ways to use the data for adaptive management and how that might be communicated to the main stakeholders. The afternoon was spent reviewing the draft Manell-Geus household survey. The draft survey was pretested four times in the Tumon and Tamuning areas. This activity was limited to ten total pre-tests due to the strict procedures set in place following OMB guidelines. As a result, the participants were broken into pairs and practiced conducting a household survey using the draft questionnaire on other trainees, trainers, and volunteers from Guam who were not from Merizo and not a part of the training. The participants who would serve as enumerators for the Manell-Gues household survey were selected to conduct actual pretests of the household survey. As lead social scientist of Manell-Geus assessment, Wongbusarakum advised to pre-test on non-Merizo residents since a full census assessment will be conducted in Merizo. Following the pre-testing, the participants conducted a thorough review of each question going through comments and revising questions as necessary.

Day 5:

The final day of the training began with a discussion of the pretesting activity. Wongbusarakum then gave a brief presentation on data analysis. This was followed by an overview of the next steps for the Manell-Geus work that included getting official approval from NOAA to finalize the survey and implement it, training additional enumerators, and the developing SEM monitoring plan for the area.

After the overview of next steps, participants took a quiz based on the information presented over the week to help trainers gauge areas of the workshop that could have benefitted from additional emphasis and attention. Overall, participants did well in the quiz. One consistent area for further clarification was on the concept of “key learning” and how it relates to the socioeconomic monitoring process. In addition, all participants filled out an evaluation of the training.

To wrap up the workshop Quinata gave a closing remark and certificates were presented to all the Guam participants and trainers-in-training.

Recommendations for future trainings:

For future trainings that follow the Guam training format, trainers will develop a scenario to use throughout the training exercises. Although real cases were used for activities like developing indicators, communicating results, and using results for adaptive management, it would have been helpful for participants and trainers to use a single case throughout the week’s work. This would allow activities to build on each other.

Appendices:

Agenda

APPENDIX 1: Agenda

SEM-Pasifika Training Workshop
September 28-October 2, 2015, Guam
Detailed Agenda for Training Team

Objectives:

- To build socioeconomic monitoring capacity of the participants based on SEM-Pasifika
- To validate and start addressing areas of need based on August 2015 socioeconomic monitoring (SEM) capacity building need assessment survey
- Trainers in training will lead sessions

Expected outputs/outcomes from workshop:

- Participants trained to undertake a socioeconomic assessment
- Validated survey results of socioeconomic monitoring capacity development needs
- Regional trainers gained experience through facilitating sessions
- Participants deepening their knowledge and abilities in the areas identified in the SEM capacity building need assessment survey
- Greater understanding and appreciation of socioeconomic monitoring as an important tool to improve site management of the coastal and marine areas in the Pacific region
- Commitment of participants to future SEM-Pasifika activities, possible sharing information and skills with greater PIMPAC regional group

Lead Training Team

Supin Wongbusarakum, NOAA

Brooke Nevitt, MINA

Marybelle Quinata, NOAA

Trainers in Training

Shirley Koshiba, Palau International Coral Reef Center

Bertha Reyuw, Yap Community Action Program

Kriskitina Kanemoto, Chuuk Conservation Society

Angel Jonathan, Conservation Society of Pohnpei

Bond Segal, Kosrae Conservation Safety Organization

Mark Stege, Marshall Islands Conservation Society

Rachael Nash, Micronesia Challenge

Erin Zanre, Hawaii Division of Aquatic Resources

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Day & Time	Activity	Lead	SEM-P	Notes and details
Monday, 28th	DAY 1 (presentations & group activities all day)			
8:00 AM	Trainers only: Finalize workshop set up	Training team		Set up projector, laptop NEED: Projector, laptop, screen, flip charts, extension cords, tape, markers
8:30-8:45	Participant check in	Core team volunteers		Name tags (have them identify 2 ground rules and 2 expectations on sticky notes for clustering as they come in...)
8:45-9:00	Welcome opening	Val		Overview of Habitat Blueprint Manell-Geus, highlight SEM
9:00-9:15	Participant introductions	Brooke		
9:15-9:30	Clustering with expectations and ground rules	Marybelle		
9:30-9:45	Training objectives and expected outputs	Brooke		Link to previous activity
9:45-10:00	Overview of workshop schedule	Marybelle		
10:00-10:15	Break			
10:15-10:45	Presentation: What is socioeconomic monitoring and why conduct socioeconomic monitoring?	Supin		PPT
10:45-11:15	Results of SEM capacity building need assessment survey	Supin	Assessment report	Float the report around
11:15-12:00	Management goals and objectives for Manell-Geus and links to NOAA Coral Reef Monitoring Plan	Marybelle and Supin		Why was this site chosen? What are the management goals? What SE work has taken place in MG? Where else is there a need for SE work?
12:00-1:00	LUNCH			

1:00-1:30	Case Studies	Shirley and Brooke		Palau and Laolao
1:30-2:00	Consult with Stakeholders	Brooke		PPT
2:00-2:15	Presentation: Overview of SE monitoring process	Brooke	106-107	Introduce the steps, Activity...pass out steps (two copies of each) break into 2 teams of 8 and have them get in order.
2:15-3:15	Defining assessment objectives	Shirley, Mark and Kris	Worksh et 1	See Session Plan
3:15-3:30	Break			
3:30-4:00	Cross review and feedback for assessment objectives	Shirley, Mark and Kris		
4:00-4:30	Recap and daily monitoring, intro next day's schedule;	Marybelle		Request two volunteers to recap the next day;
4:30-4:45	Debriefing of day 1	Training team		
Tuesday, 29th	Day 2			
8:15	Trainers only: meet	Trainers		Go over the day, make sure we are prepared, print goals and objectives
8:30-9:00	Welcome and Recap from previous day	2 trainee	Marybell e	Present summary of the previous day
9:00-9:30	Presentation: Main SEM-P Indicators	Bertha Rachael Marybelle and Angel	p. 34-35	See Session Plan
9:30-10:00	Climate Change and MC indicators	Brooke	Appendic es	Activity
10:00-10:15	Break			

10:15-12:00	Presentation: Good indicators and how to develop them	Supin	Worksh et 2,	Same small group developing indicators for the first day assessment objectives
12:00-1:00	LUNCH			
1:00-2:00	Continue working on indicators	Supin		Cross-review each other indicators
2:00-2:30	Presentation: Free, prior and informed consent and ethical principles when conducting field research	Supin		
2:30-2:45	Break			
2:45-4:15	Preparing the assessment	Erin	Worksh et 4	Session plan
4:15-4:30	Recap, Daily monitoring, intro next day's schedule;	Marybelle		Request volunteers for following day Recap
4:30-4:45	Debriefing	Training team		
Wednesday, 30th	Day 3			
8:15	Trainers meet			
8:30-9:00	Welcome and Recap from previous day	Marybelle		
9:00-9:30	Collect data and data collection methods	Bond	Worksh et 6	See Session Plan
9:30-10:00	Review DRAFT Manell Geus survey	Supin		
10:00-1:00	Key informant interviews	Supin		
1:00-2:00	LUNCH			
2:00-2:45	Recap on Key informant interviews	Supin		
2:45-3:00	Recap and daily monitoring	Marybelle		
3:00-3:15	Debriefing of day 3	Trainers		Reflect day 2 and prep for day 3;
Thursday 1st	Day 4			
8:15	Trainers meet	Trainers		Make sure we are ready for the day

8:30-9:00	Volunteer participants recap previous day for group	2 volunteers		
9:00-10:00	Communicate results	Marybelle, Bertha, Angel, and Rachael	Workshop 7	Session plan and activity
10:00-10:15	Break			
10:15-11:00	Using results for adaptive management	Shirley, Kris and Mark		Session plan and activity
11:00-12:00	Pretest survey in workshop	Marybelle		Break into pairs and pretest come back to large group and discuss
12:00-12:30	Field work briefing: Prepare for pretest and head out	Marybelle		Break into groups with designated people to interview and designated section of survey
12:30-1:30	LUNCH			
1:30-3:30	Pretest in the field	All		
3:30-4:30	Debriefing of day 4 and workshop	Training team		Reflect day 3 and prep for day 4;
Friday, 2nd	Day 5			
8:30 - 9:00	Volunteers recap previous day	2 volunteers		
9:00-9:30	Large group discussion: Debrief on pretest and what needs to be changed in the survey questionnaire?	Marybelle		How did it go? How long did it take? Are you glad you had this opportunity? Did you run into any problems, etc.?
9:30-10:00	Analyzing data	Supin		
10:00-10:15	Break			
10:15-10:30	Next steps for Manell Geus	Marybelle		
10:30-11:00	Evaluations and Quiz	Brooke		
11:00-11:15	Certificate presentation	All		
11:15-11:30	Closing remarks	Marybelle		

11:30	LUNCH			
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