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Subregional Headquarters for the Caribbean

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Data Ownership and the Harmonization of Survey
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**REPORT OF THE ECLAC REGIONAL WORKSHOP ON DATA
SHARING, DATA OWNERSHIP AND THE HARMONIZATION OF
SURVEY DATASETS**

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REPORT OF THE ECLAC REGIONAL WORKSHOP ON DATA SHARING, DATA OWNERSHIP AND THE HARMONIZATION OF SURVEY DATASETS

Background

The United Nations Economic Commission for Latin America and the Caribbean (ECLAC) Subregional Headquarters for the Caribbean convened a two-day Regional Workshop on Data Sharing, Data Ownership and the Harmonization of Survey Datasets, on 26-27 August 2009 at the Cascadia Hotel, Trinidad and Tobago.

This workshop was part of the ongoing efforts of ECLAC to strengthen the statistical capacities of National Statistical Offices (NSOs) in the region and was one of the concluding activities of the project *“Improving Household Surveys in the Caribbean”* which ends in September 2009. The goals of this overall project were to improve the comparability of social statistics produced in the Caribbean through household surveys and to ensure international standards of comparability.

More specifically, the main objectives of the project’s final workshop were to:

- (a) Exchange and learn from good practices in the conduct of household surveys in the subregion;
- (b) Further harmonize methodologies, concepts and definitions in household surveys and to bring these in line with standard guidelines such as those of the International Household Survey Network (IHSN);
- (c) Demonstrate the usefulness of the Caribbean Household Surveys Databank (CHSD);
- (d) Encourage the sharing of survey datasets; and
- (e) Identify a way forward for the conduct of household surveys in the Caribbean subregion according to international guidelines and methodologies.

Present at the workshop was a cadre of senior statisticians as well as other experts from NSOs, ministries of social/human development, regional organizations/agencies and consultancies. These participants were updated on the various tools and methodologies relating to the systemization of household survey micro datasets, options for internet-based dissemination and the usefulness of metadata systems. A full listing of participants and the agenda for the workshop are annexed to this report.

Agenda item 1

Welcome and opening

Mr. Neil Pierre, Director of the ECLAC Subregional Headquarters for the Caribbean, extended a warm welcome to all participants and thanked them for attending the two-day concluding workshop. He outlined the main objectives of this regional forum which were to: (a) exchange lessons learned from the conduct of household surveys; (b) harmonize and standardize household survey processes; (c) demonstrate the usefulness of the CHSD; (d) encourage the sharing of survey datasets; and (e) identify the way forward for household surveys in the Caribbean subregion.

He acknowledged the United States State Department, which had financed the project *“Improving Household Surveys in the Caribbean”* and expressed the hope of a continuation of this venture in the long term. However, in order to boost approaches to obtaining the necessary funding for such a task, he stressed the need for participating countries to validate the project. This could be accomplished by ensuring that Member States were synchronized and prepared to compile a system of data that would allow for comparisons between Caribbean nations and other countries/regions in the world.

He observed the challenges in the region that hampered the harmonization effort undertaken by ECLAC and cited problems such as differences in survey methodologies and time series, as well as the lack of reliable and available data. He recognized that even though overcoming these obstacles would not be an overnight process, it was necessary in order to have representative statistical data for Latin America and the Caribbean.

In conclusion, he anticipated a productive workshop and trusted that representatives would continue to consider ECLAC as a reliable partner in the process of improving Caribbean household surveys. He hoped that participants would return to their countries strengthened and expressed, once again, his appreciation for their continued support throughout the project.

Agenda item 2

Overview of the meeting and introductions

The Statistician of the ECLAC Subregional Headquarters for the Caribbean concurred with the points raised by the Director. He mentioned that even at the international level it was a challenging feat, however, accomplishing some degree of harmonization in the Caribbean with respect to definitions, concepts and methodologies, was a goal worth pursuing.

He proceeded to outline the various presentations on the agenda of the workshop and singled out the key facilitators for the sessions. After stressing the importance of sharing databases and experiences among countries, he invited the representatives of countries and organizations present to introduce themselves.

Agenda item 3

Presentation: Outputs of the Household Survey Project

The Statistician of the ECLAC Subregional Headquarters for the Caribbean made a presentation on the outputs of the project *“Improving Household Surveys in the Caribbean Region.”* He presented a background of the project, stating that the United Nations Statistics Division encouraged all its member States to conduct periodic intercensal household surveys to update estimates between Population and Housing Censuses (PHCs). Financial support was a major constraint in the Caribbean, however, and most countries were only able to carry out these surveys on an ad hoc basis only. He further pointed out that even regularly conducted household surveys, which might be done according to international standards, could be limited by their lack of published metadata or documented metadata.

He then provided an overview of the project and its objectives which were to improve the comparability of social statistics in the Caribbean by ensuring international standards of comparability. He outlined the major activities of the project along with the key accomplishments and outputs.

The first major output was the convening of an *Expert Group Meeting* in June 2007. Participants at this meeting had the opportunity to share their country experiences in the conduct and analysis of household surveys. He reported on two of the recommendations made by the meeting: (a) the development of the NSOs capacity in anonymization techniques; and (b) the preparation of Letters of Agreement to formalize data sharing arrangements. He regretted not being able to organize the training in anonymization, but stated that an opportunity for learning some of those techniques would be introduced in the two-day session. He noted that the draft Letter of Agreement was prepared and subsequently used for formalizing data sharing arrangements with some countries in the region.

The second output of the project involved the *Collection, Analysis and Harmonization of Household Datasets* which aimed to promote the use of micro data and foster national and regional socio-economic analyses. Achieving this output involved seeking the concurrence of the various member States to share their micro datasets with the ECLAC Subregional Headquarters. A few countries had become signatories to a Letter of Agreement, including Antigua and Barbuda, Belize, Grenada, Dominica, Saint Lucia and Trinidad and Tobago. Other countries had temporarily refused and stated that they would prefer to anonymize their micro datasets before sharing. The ECLAC Statistician assured participants that the content of the data was not changed, and once datasets were collected, they were harmonized for uploading onto the online platform. He explained that harmonization as it related to data, involved formatting to ensure that the datasets met the online platform requirements.

He presented the third output of the project, *Regional Workshop on Data Sharing, Data Ownership and the Harmonization of Survey Datasets*. He mentioned that the workshop aimed to learn more details about the results of the overall project and share

the experiences of conducting surveys in the participating countries. He also highlighted the fact that the online CHSD platform would be launched for the first time at that forum and the IHSN tools for metadata would also be described. The upcoming final stage of the project involved the dissemination of both metadata and micro data via the CHSD platform. He explained that access to the databank would be allowed only upon request.

To conclude, he declared that the *Household Survey Project* was in the process of achieving the harmonization of household survey procedures and the sharing of micro databases for online use in socio-economic analyses. He proposed the convening of a meeting with United Nations Development Fund (UNICEF) and Caribbean Community (CARICOM) to discuss the harmonization of surveys and reiterated the commitment of his office on the promotion of evidence-based policy formulation. On that note he encouraged country representatives to share their survey datasets to ensure the success of the CHSD, thereby promoting richer analyses and results that could be derived from the databank.

Agenda item 4

Discussion: Outputs of the Household Survey Project

In discussing the *Outputs of the Household Survey Project*, a few concerns, issues and sanctions were raised. An initial concern was the extent to which ECLAC might be duplicating efforts, as (CARICOM) was also collecting data from member countries. This point was clarified by the representative of ECLAC who assured the participants that CARICOM collected information on countries and not individual survey micro datasets. He reported on a meeting which was held between ECLAC and CARICOM to streamline the activities of the offices. He also spoke to other collaborative ventures such as the sharing of gender indicators, collected under an ECLAC project, with CARICOM as they proceeded with the next round of data collection for gender and the environment.

The discussion also raised a question pertaining to the relationship between the ECLAC office in Port of Spain and headquarters in Santiago and to what degree the former was receiving technical assistance from the latter. It was confirmed that the relationship was, in fact, excellent and that the CHSD online system was established through the Santiago office and patterned around their household surveys database called BADEHOG (Base de Datos Encuestas de Hogares). The representative of Saint Lucia also commented on his country's long-standing and good working experience with ECLAC Headquarters in the use, storage and development of their own datasets. He fully endorsed the online system and confirmed that there had never been any violation of the datasets as the country's approval had always been requested.

Another concern raised at the workshop related to the physical location of the countries' datasets and the possibility of losing control once the data were released. Participants were also concerned about the potential for researchers to misinterpret variables due to their lack of experience with the surveys, and the likelihood of analysts arriving at different results based on their approaches to the datasets. The consequences

would mean false estimates of a country's socio-economic status. In support of these cases, it was indicated that the root of the problem was the lack of documentation of survey procedures. In the long term, the interpretation of data would impact policy, thereby justifying the importance of including metadata in the survey process. The ECLAC representative was confident that the presentations to follow, on customizing data for public use and metadata tools, would help clarify these issues.

The workshop participants were also informed that the United Nations Development Programme (UNDP), International Labour Organization (ILO) and UNICEF had been working together to identify key questions for household surveys. This comment fell in line with the topic of harmonization of household survey concepts, definitions and methodologies. It was agreed that having a set of core questions and deciding what indicators to use were steps in the right direction for achieving this goal.

On the topic of harmonization, workshop participants requested a clearer definition of the term and asked whether or not it referred to conceptual aspects or the structure of the datasets. The response from the ECLAC representative was that both approaches were used, however for the purpose of the regional workshop, the focus was on harmonizing datasets for compatibility with the online platform.

Another major issue raised during the discussion was that of dissemination. It was noted that there were major discussions in most countries as to what information should be open to the public. Participants stressed that the various aspects of dissemination policies should be addressed carefully. The representative of ILO cautioned against the uni-dimensional approach to dissemination and appealed to ECLAC to explore the development of a data dissemination policy for household databases through a working group.

Agenda item 5

Presentation: Methodologies in Household Surveys – The Latin American Experience

The representative of ECLAC Headquarters, Santiago made a presentation on “*A Brief Look at Household Surveys in Latin America.*” The background of the presentation revealed that since the 1990s, Latin American countries had relied heavily on household surveys as a major source of information for diagnosing and monitoring socio-economic situations. In turn, countries had been able to monitor social trends, design and evaluate public policies and monitor the progress of achieving Millennium Development Goals (MDGs).

Thanks to the sustained effort of NSOs and the support of international organizations, of which the Measurement of Living Conditions in Latin America and the Caribbean (MECOVI) Program is a good example, he stated that the quality and regularity of surveys had improved. In addition, technical assistance had been provided to the region by ECLAC. It was also mentioned that working groups had strengthened

aspects of household surveys in Latin America, which was within the context of the Statistical Conference of the Americas. Despite these advances, however, social statistics still faced challenges such as the lack of an integrated system of household surveys, financial restrictions on sustaining surveys and a lack of institutional capacity.

He examined the conduct of household surveys in Latin America and stated that most countries shared common concepts and characteristics in the implementation of their surveys. In fact, many had regular data collection on labour and income which, in some cases was part of a well established survey programme due to stable funding. However, he pointed out that household surveys in Latin America were far from being standardized and there were differences in the frequency and type of surveys conducted, geographic coverage, sample sizes and the topics covered in the individual countries.

In terms of the frequency and types of household surveys, he mentioned that no Latin American country had achieved the ideal situation of having an Integrated Household Survey system (IHSS), which he explained was a group of surveys with their own well-defined periods and contents. Instead, much focus went into Labour Force Surveys (LFS) which for some countries was their only regular survey. Furthermore, countries were at different levels of progress with respect to household surveys. For example, few countries had both a continuous LFS and Survey on Living Conditions (SLC) while most have fairly recent Household Budgetary Surveys (HBS).

He discussed the topics covered in Latin American surveys, the most common of which included person/household demographic information, housing and access to services, education, labour and income. Information on health and migration were not available from every survey. To complicate matters, individual countries covered different topics and analyzed them at different levels of detail. As a result, some categories were incomparable among countries even for subjects such as labour and income. This was not necessarily because of the lack of adherence to international recommendations, but because of the high degree of generalization, which left ample room for choosing how to apply certain criteria.

The representative of ECLAC, Santiago, acknowledged the efforts of his Latin American NSOs which regularly introduced changes in an attempt to improve household surveys. He also mentioned that incorporating international standards could help achieve comparability among countries; however, this should not take precedence over the information that was relevant at the national level. Lessons learned and recommendations for implementing household surveys in Latin America included: (a) the fact that it was essential to strengthen institutional capacity; (b) every part of the implementation process was important; (c) sampling frames should be updated regularly; (d) survey designs should be consistent with the objectives of the survey; (e) interviewer quality had a large impact on the survey process; and (f) inconsistencies in data should be better dealt with by NSOs, because users of surveys were generally less prepared to do so. In conclusion, he urged the need to use and exploit data as an important means of enhancing household surveys. NSOs could accomplish this task through joint ventures with universities and research centres.

Agenda item 6

Presentation: Methodologies in household surveys – the Caribbean experience

For the Caribbean perspective, the representative of Saint Lucia made a presentation on “*Methodologies in Household Surveys in the Caribbean.*” He noted that in the last 10 years, household surveys in the region had focused on four main areas, including labour (LFS), poverty (SLC), household consumption and expenditures (HBS) and monitoring the situation of women and children and MDG indicators (Multiple Indicator Cluster Survey [MICS]). Like Latin America, the LFS was the most current and frequent source of social data in the Caribbean. He mentioned that over the past two to three years, the ILO had done much work with respect to harmonizing concepts and modernizing the content of the LFS. However the organization is faced with the challenges of changing methods and procedures after decades of conducting surveys the same way.

He further elaborated on the LFS which focused on six employment-related statistical concepts, including population, working age population, employment, unemployment, time-related underemployment and informal employment. He also mentioned some core recommendations made by the ILO for the development of various criteria within the LFS, such as: (a) having a one month reference period for unemployment for persons actively seeking work; (b) applying the “actively seeking additional work” criteria; (c) using a 35 hr cut-off in determining the under-employed; and (d) implementing the International Standard Classification of Occupations (ISCO-08) and International Standard Industries Classification of All Economic Activities (ISIC Rev 4). He also expressed the need for support and assistance for the efforts of the ILO Subregional Office in Port of Spain. Finally, he stressed that it was important for Caribbean NSOs to start with the LFS at the core of their development and then build other surveys around this framework.

The presenter then described the Caribbean experience with the SLC and HBS surveys. A “pure” HBS focused on developing the Consumer Price Index (CPI) market basket based on plutocratic considerations; while the SLC is used to develop poverty, inequality and various other social indicators, a number of which were MDG indicators. While these surveys served different purposes, he stated that some convergence between the SLC and HBS was possible and had been done, for example, in Trinidad and Tobago with the 2008/ 2009 HBS/SLC light. There were, however, some issues surrounding the new method of incorporating SLC questions in an HBS such as the handling of the under-reporting of food expenditure and the fact that HBS reference periods ranged from one year in some countries, to shorter periods in others. He also mentioned that in larger countries where both SLC and HBS surveys were conducted, the combination could assist in increasing the frequency of reporting progress made in reducing poverty.

He drew reference to the introduction of new classification systems such as the United Nations Classification of Individual Purchase according to Purpose (COICOP) which allowed countries to access COICOP up five to seven digits. The presenter felt very strongly about the Caribbean’s lack of participation in the 2005 International

Comparison on Prices (ICP) round. The basis for comparing poverty indices among Caribbean countries did not exist and yet the World Bank had artificially generated a Purchasing Power Parity (PPP) for countries of the region, despite the fact that last participation of Caribbean countries in the process was in 1993. He stressed the urgency for the Caribbean to participate in the upcoming 2011 ICP round.

He discussed other surveys that were used in the Caribbean such as the MICS, Core Welfare Indicator Questionnaires (CWIQ), and literacy surveys. He further elaborated on the need for conducting literacy surveys, the single Millennium Development Goal (MDG) indicator on which no data had been captured and reported on in the Caribbean.

In conclusion, he made recommendations for household surveys in the Caribbean. He mentioned that the LFS needed improvements on the timeliness and frequency of the surveys which should be conducted at least once every year. He also reaffirmed the importance of Caribbean participation in the 2011 ICP round and suggested that HBS/SLC surveys be conducted every five years. He promoted the institution and strengthening of the Caribbean LFS and further elaborated on the careful planning required for ensuring the maximum use of the SLC/HBS surveys for policy interventions.

Agenda item 7

Discussion: Methodologies in household surveys

In discussing the preceding presentations, there seemed to be general agreement among participants that combining SLC and HBS surveys was more cost effective and reduced the extent of respondent fatigue, especially in smaller countries of the Caribbean. The workshop also concurred with the representative of Saint Lucia's initiative for encouraging the region's participation in the 2011 ICP round.

Participants asked for justification from the Latin American representative pertaining to the use of income for measuring poverty. The experience in some Caribbean countries, such as Jamaica, was that respondents tended to lie about their income and therefore consumption was considered a better measure of a person's well-being. In response, the ECLAC representative mentioned that was a common problem; however, from the conceptual point of view, using either income or consumption was not necessarily wrong. Income measured the capacity of a household to satisfy its needs based on its earnings, while consumption measured if the household did actually satisfy its needs. He was not aware of a complete exercise that determined which topic had a larger margin of error. From experience, he stated that using consumption might be worse at the micro level.

Another point for clarification brought forward during the discussion was the slight difference between SLC and HBS consumption questions and how this would affect the SLC/HBS combination as an indicator of poverty. The point was well taken and it was agreed that when combining HBS and SLC surveys, processes of consumption

tended to aggregate, however, this technique was still believed to be more convenient for smaller countries in the region.

Several participants posed questions on the Latin American experience with capturing secondary and tertiary sources of income through the use of LFSs. According to the representative of ECLAC, Santiago, the experience with multiple job holders was mixed. Some countries did obtain information up to secondary occupations and how to distinguish between main and secondary sources of income. However he also mentioned that there had been difficulties incorporating these changes into the surveys.

Workshop participants also expressed concerns about the PPP calculation. In response, the representative of Saint Lucia provided some clarification, indicating that the PPP methodology for ICP surveys examined price structure, and as such reflected spending in the country. Participants were reassured that if the situation in those countries had changed drastically since 1993, then it was safe to ignore the PPP. However, participation in the 2011 ICP round was still important because without it, there would be no basis for comparison across countries. He further stated that while countries partook in the survey, the results would not be used for policy formulation.

The trade-off of using short versus longer reference periods for conducting surveys was also an item of discussion at the workshop. Shorter periods were said to combat fluctuations in situations whereas, with longer time-frames, recall issues might arise. In response, it was mentioned that costs tended to impact reference periods and for the HBS, in particular, a one-year reference would be ideal. One problem associated with the one-year reference period was that there was never any assurance that the year chosen to conduct the survey will be “typical”. Agriculture also had an impact on consumption because of seasonality. If a country had a large agricultural sector then it would be best to maintain the one-year time-frame, however, eight months would be adequate where seasonality was not an issue. Concerns about the issues with the non-food component of the CPI basket and the World Bank’s adjustment of the Caribbean PPP were also raised during the discussion.

Agenda item 8a

Country Presentations on Household Surveys

Country representatives were then invited to give brief presentations on future plans to conduct household surveys and policies to share micro data arising from the surveys.

Antigua and Barbuda

The Statistics Division of Antigua and Barbuda had conducted a series of national household surveys. These included a national ICT survey in 2008 and a Country Poverty Assessment (CPA) in 2005. The CPA was carried out in collaboration with Kairi Consultants as a comprehensive survey which included an HBS and an SLC.

With respect to future surveys, preparations were underway for the conduct of the next round of Population and Housing Census (PHC) in May 2011 and CWIQ with the assistance of the Caribbean Development Bank (CDB). The office was re-engineering the Statistics Division leading to the preparation of a new work plan which would span five years. A structure of the conduct of surveys and censuses would be included in this work plan.

In terms of data sharing, a Letter of Agreement was signed between the Division and ECLAC allowing for the sharing of micro datasets, and would include the micro data from the census. To date, there had been no issues with the data sharing arrangements but concerns about trust and the removal of datasets from the physical premises of ECLAC, which were addressed in an earlier segment of the training workshop, remained a genuine concern for the office.

Belize

Belize had administered LFS annually over the last 16 years. The survey had been conducted semi-annually and the new schedule captured both high and low economic cycles. The administration of the Household Expenditure Survey (HES) in 2008 affected the conduct of the LFS, however, labour force indicators for that year were captured through the HES. A number of other surveys had been conducted including a Gender, Alcohol and Sexual Behaviour Survey in 2005, a Sexual Behaviour Survey in 2006 and the MICS survey. In October of 2007, the office was also able to field a Quality of Life Survey. Poverty Assessment Surveys were also completed in 2001 and 2009. A remittance module and some questions on sexual behaviour were added to the last installation of the Living Standards and Measurement Survey. Preparations for the 2010 round of the census were on stream.

With regard to the data dissemination policy, the Statistics Act made provisions for the sharing of data and, in that regard, the Statistics Institute of Belize had signed on to the Letter of Agreement with ECLAC for the sharing of some of their survey datasets.

In terms of the future plans for the Institute, there was a move towards increasing the frequency of surveys. This change was expected to result in the conduct of major surveys such as the poverty assessments every five years and censuses every 10 years. In addition, the Institute would conduct some multiple topic surveys similar to the MICS survey but not limited to generating indicators on women and children.

Dominica

The Statistics Office conducted an SLC/HBS over the 2008/ 2009 period with assistance from Kairi Consultants. The fieldwork for the survey had been completed and questionnaires were being scanned and edited. The survey results and final report were due to be released in October. As a means of building the statistical capacity of the office, the Central Statistics Office (CSO) would prepare two chapters which would be included in the final report. An LFS was conducted in 2005 and one will be conducted in 2009, with technical assistance from the ILO Subregional Office.

With respect to data sharing, an agreement was made with ECLAC for the sharing of some data sets. There were plans to engage in further data sharing as the agreements made between the Government of Dominica and CDB made provisions for sharing of SLC data with agencies and academic institutions.

Grenada

As was reported by the other Organization of Eastern Caribbean States (OECS) countries, the Statistics Office had benefited from the support of the CDB in the conduct CPAs. The first survey conducted in 1998/ 1999 featured an Institutional Assessment and Community-level Situation analysis. The 2007 CPA was a comprehensive survey that covered SLC and HBS and which served as a vehicle for constructing the poverty line and CPI basket. A number of challenges were encountered such as the recruitment of qualified staff, financial constraints and administrative burdens.

A LFS was due in the near future. At that time unemployment estimates were generated from the CPA, however, in light of the impact of the economic crisis on the region, the administration of an LFS had become critical as a vehicle for accurately measuring the impact of the crisis on major industries, such as tourism and agriculture. The survey could also facilitate an improvement in the institutional capacity of the office.

Plans were afoot to introduce Personal Digital Assistants (PDAs) for data collection. Funding had been secured from the United Nations Population Fund (UNFPA) for the purchase of Geographic Information System (GIS) equipment which would assist in improving the office's mapping capabilities. The census would be conducted in May 2010 after the completion of the LFS. The project management approach being employed in the conduct of the LFS would be used for managing the census.

On the topic of data sharing, the office had signed on to data sharing protocols with ECLAC. An appeal was made for the provision of technical support to the office which would enhance its ability to support the harmonization process which had been initiated by CARICOM.

Jamaica

The Statistics Institute of Jamaica conducted quarterly LFS and an annual SLC. Other ad hoc surveys were completed throughout the year based on requests by private companies and government agencies. The 2009 round of SLC was currently being conducted and the findings of that survey were due to be released by the end of the year. With respect to the sharing of micro data, that issue had not been discussed at an institutional level and therefore no pronouncements could be made on the matter.

Saint Lucia

The Statistics Office conducted quarterly LFS. A core challenge with that survey was the timely production of the survey results. The intention was to deliver the results of any one quarter about one month after the completion of that round however, those timelines were difficult to keep. In the third quarter of 2008, an informal sector module was included in the LFS. That module was part of a larger pilot survey which sought to measure the size of the informal sector. The methodology was based on the 1-2 survey design in which informal sector workers, or Household Unincorporated Enterprises (HUEMS), with at least some market production, were identified using the LFS and then subsequently interviewed in Phase 2 of the survey. That pilot survey formed part of a project which was being implemented in the region by the ECLAC Subregional Headquarters for the Caribbean. The preliminary survey results showed that 40% of the workers in the country were involved in the informal sector. Those findings were useful in explaining the findings of the country's economic census. Despite the value of the survey, the implementation of that larger survey reduced the speed of data collection for the LFS and the issue had to be addressed by recruiting additional field officers.

In addition, the Statistics Department, in collaboration with Statistics Canada, undertook the preparation of a comprehensive literacy survey. To that end, a number of activities were carried out including the conduct of a pilot survey and the preparation of a customized survey instrument which was in line with international standards. The launch of the actual survey was stopped prematurely, but it was anticipated that the process would be completed. The value of the experience for the Statistics office and the utility of the survey for planning purposes were underscored.

Like the other OECS countries, Saint Lucia conducted a SLC/HBS in 2006 and through this survey a new basket for the CPI with base year 2008 was introduced. The office has also completed training in the implementation of the Price Index Processor software for CPI which was introduced by the International Monetary Fund (IMF). A recommendation was made for the use of the "Geometric Young Index" over the Laspeyres Index for CPI calculations. The advantages of that index were its flexibility and usefulness in generating CPIs on a monthly basis. A CWIQ survey was conducted in 2004 as a means of updating poverty estimates and addressing the lag since the last SLC in 1995. This survey generated several MDG indicators but not the Head Count Index.

A number of other ad hoc surveys had also been accomplished, including a survey on Contraceptive Prevalence and the needs assessment of the Roving Caregivers Programme (RCP). The survey was invaluable in identifying vulnerable children and

providing the necessary interventions. The outcomes were also valuable in providing guidance for future policy decisions.

In terms of future surveys, the preparations for the 2010 round of the PHC were underway and a pilot of the census was currently being implemented. In addition, plans were afoot for the conduct of environmental awareness surveys. Saint Lucia had already signed on to the Letter of Agreement with ECLAC and had maintained a strong relationship with that organization over the years.

Saint Kitts and Nevis

An HBS/SLC was conducted 2007/2008 by the Statistics Department with the assistance of Kairi consultants. It was also noted, however, that due to budgetary constraints and the preparations for general elections, the office would not be able to undertake any major surveys within the next few years. The next survey that would be conducted was an HBS which would be done in the following five years. Preparations for the next round of PHCs were on-stream and the census would be conducted in 2011.

Suriname

The General Bureau of Statistics conducted a number of household surveys, including a quarterly and continuous household survey in the districts of Paramaribo and Wanica. The survey was aimed at getting insight on the demographic and socio-economic situation of persons residing in those districts as well as information on labour force characteristics. Challenges in the conduct of the survey included non-response and issues with the collection of data on income-related items.

The Bureau also conducted a few other household surveys. An HBS which was used to measure consumption and to compile the CPI basket and other weight had been conducted in 2007/ 2008, however, plans were underway for another round in 2012/ 2013. A MICS survey was conducted for the second time, with the support of UNICEF in 2006. In 2007, the Ministry of Social Affairs and Housing conducted a Proxy Means Test (PMT) survey which was used to identify beneficiaries eligible for social services provided by the Government of Suriname. The PMT survey was conducted through the Health Sector Programme implemented by the Ministry of Health and the Inter-American Development Bank (IDB).

Data sharing with respect to MICS and PMT ought not to be a problem, but such sharing would require approval from the Minister of Social Affairs and Housing. The confidentiality of data was of utmost importance to the Government of Suriname and on those grounds, the sharing of other micro datasets could present a challenge.

Trinidad and Tobago

The Continuous Sample Survey of the Population was the main survey conducted by the Central Statistics Office. That annual survey generated estimates of employment,

unemployment and labour force characteristics. Reporting for the survey was done on a quarterly basis. A few challenges included the production of timely reports, issues with accessing residents who lived in crime “hotspots”, the high turn over of editing and coding staff and the lack of adequate human resources to do the data processing. Despite the numerous challenges however, there had been some level of success with the production of survey results.

An HBS was conducted over the period May 2008 – June 2009, the results of which were used primarily for revising the CPI basket and constructing a poverty line. The communication strategy and the provision of tangible incentives to respondents were deemed to be very effective in raising awareness of the survey and assuring a high level of response. Data cleaning of the survey dataset was ongoing and the results were due to be released by September/October. Mention was made of a study to assess the socio-economic impact on sugar related areas which was being carried out through the European Union.

Preparations for the 2010 round of PHCs were on stream. The CSO was part of the regional Census Coordinating Committee and had been actively mobilizing efforts towards the finalization of the census questionnaire. This questionnaire was harmonized in line with the recommendations from CARICOM and its preparation was overseen locally by the Technical Advisory Committee and the National Advisory Committee. The questionnaire was administered in the pilot survey being conducted in both Trinidad and Tobago over the period 17-31 August 2009. That pilot was useful for improving the questionnaire and the data processing technology.

In the future, the CSO did not plan to conduct any new household surveys. A Literacy Assessment and Monitoring Program (LAMP) survey, initiated by CARICOM, was due to be conducted after the 2010 census. The CSO lent support to the other government departments in the areas of questionnaire design, data collection and processing. This arrangement existed, for instance, with the Ministry of Social Development with the conduct of the MICS survey.

The issue of data sharing was being debated amongst senior staff at that time. Whereas the CSO recognized that its office did not have the capacity to fully utilize the survey data, there was still a high level of reluctance to share. This was based not only on the concerns of the office about trust and access but, in addition, the CSO was constrained by the Statistics Act which barred the sharing of data at the individual level. Thus, while the CSO had consented to the sharing of the LFS, access to other data sets would not be considered once a policy on data sharing had been established.

United States Virgin Islands

Demographic and housing characteristics and information were collected annually through the household survey. Efforts were being made to have regular intercensal

surveys, however, funding continued to pose a challenge. The PHC was scheduled to be conducted in 2010 and the form to be used would mirror the United States census form. The instrument was standardized along with the United States Government who was the donors for the exercise. The key challenge encountered by the Bureau related to the lack of a master address list. That issue was being addressed through the use of GIS technology which would help with the generation of a master sampling frame. Listing would be done subsequently in 2011. The Primary Sampling Units (PSUs) that were developed in 2005 had been exhausted.

Data was disseminated primarily through newsletters that focused on key topics. This medium had proven to be effective in stimulating users' interest. On the topic of data sharing, the Bureau had not shared micro datasets in the past, however, discussions on the issue would be pursued with the Director.

Agenda item 8b **Country reports from ministries of social development**

Representatives from social departments were also invited to give a brief description of the statistical surveys being conducted in their countries, in the area of social development.

Suriname

Suriname conducted the MICS3 for the second time in 2006, however, there were challenges associated with the survey, the major issue being the overestimation of child mortality rates. This problem was traced to the model used for constructing the estimates which was based on the Brass Method. A consequence of that problem was a delay in the completion of the MICS report.

A Proxy Means Test (PMT) survey was primarily utilized in order to develop proxies which would be used for identifying poor persons who would be eligible for social services from the Government of Suriname. Since data was available from the PMT survey, the IDB and the Ministry of Social Affairs and Housing initiated the development of a 'Living conditions and social assistance in Suriname' report, which was finalized in February 2009. However, the limitations of the survey lay in the small sample size which made it inadequate to draw conclusions at a district level.

Trinidad and Tobago

Like Suriname, the Ministry of Social Development in Trinidad and Tobago conducted the MICS3 survey for the second time in 2006. In the absence of a universal spatial structure the survey was administered based on municipals and successfully recorded a response rate of 93%. The survey was instrumental in providing information that helped with tracking progress towards the achievement of 20 indicators.

Preparations for the new round of the MICS4 survey were underway. The activities to be completed included: (a) the preparation of the concept note and survey plan; and (b) the recruitment of a survey coordinator and consultant. The MICS4 questionnaire would feature some new modules that covered social protection and water sanitation.

Agenda item 8c

Poverty and other poverty-related dimensions in Jamaica

A representative of Jamaica made a presentation which focused specifically on poverty and related dimensions in Jamaica. He introduced the Jamaican Survey of Living Conditions (JSLC) which was initiated by the World Bank in 1988. The project was taken over by the Government of Jamaica one year later, and was jointly conducted by the Statistical Institute (STATIN) which was in charge of field work, and PIOJ which analyzed the data.

He elaborated further on the JSLC, listing six topics that were covered by the survey including demographic characteristics, household consumption, education, health, social welfare and housing. There were also special modules included in the survey, which were based on changes occurring in society. For example, a module on Coping Strategies and Social Assistance among the Poor and Needy was included in 1997, as was Persons of Prime Working Age in 2007. He described the variations in sample sizes such as small, large and poverty maps which were taken at the regional, parish and community levels, respectively.

With regard to household consumption, the presenter stated that that issue mirrored the CPI basket and distinguished between consumption and non-consumption. Consumption, for example, could be broken down into 11 groups such as food and beverages, housing expenses, transportation and education. After defining the poor as “those whose income/expenditure fall below a predetermined poverty line...” he stated that the calculation of the poverty line included only minimum nutritional requirements. Jamaica’s poverty line since 1989 to 2009 was 60% food and 40% non-food and the ratio was based on focus group sessions.

A brief description followed on calculating poverty statistics such as the Poverty Gap and Severity indicators. These tools served to both identify the poor and also determine how poor they actually were. The results of calculations indicated that poverty in Jamaica had been on the decline. The PIOJ representative also touched on other associated matters such as housing, education, and health indicators and how these related to poverty. Studies conducted in 2007 found that there was a strong, positive relationship between poverty and materials used in the construction of houses and the use of utilities. It was also discovered that the higher the socio-economic status, the greater the expenditure on educational services and health insurance. The opposite relationship existed between poverty and welfare indicators where for example, persons in the lower quintiles were found to apply more for the Conditional Cash Transfer/PATH Program and received benefits.

In conclusion, the PIOJ representative highlighted the fact that poverty measures were obtained from the absolute approach used in the JSLC and that housing, education and health indicators correlated with poverty. Most importantly, the poverty trend in Jamaica was pointing downwards.

Agenda item 9 **Country presentations**

Following the country presentations, participants were invited to pose questions and share comments on the surveys and policies that were presented. The representative of Grenada was interested in learning more about Suriname's use of the PMT which generally was not considered as a survey tool. The representative of Suriname agreed with this statement and noted that the PMT survey was a one-time household survey that was used as a selection tool to identify proxies and target the poor. This was an alternative means of determining the poor who were eligible for the social services provided by the Government of Suriname.

Participants were also interested in learning more about the focus groups which were used in determining the 60/40 ratio for Jamaica's poverty line. The representative of PIOJ responded that the decision to utilize focus groups was to promote a more participatory approach to determining and ranking variables. Participants supported this strategy, commenting on the fact that it might be easier to obtain consensus on poverty related policies. In other words, if people disagreed with the estimates then they were likely to disagree with policies derived from those estimates.

Comments were also made with respect to the limited understanding that countries in the region had of their working poor. It was mentioned that this information should not be difficult to gather since the SLC was a subset of the LFS, then should be possible to determine if a household had members working and if the household was also poor.

Questions were raised on Suriname's rationale for determining that child mortality was overestimated by the MICS. In response, the representative stated that this overestimation was found when comparing estimates that were deduced by the Ministry of Health's administrative information. It was believed, that the Brass method and the small sample size were the causes for that significant difference in findings.

Agenda item 10a **Caribbean Household Survey Databank (CHSD)**

The presentation on the CHSD was delivered by a representative of the ECLAC Subregional Headquarters for the Caribbean. Her focus was on the standardization of data and she gave a concise definition of that technique which "involves the application of certain procedures and formatting of the data so that it could be uploaded to the CHSD platform." The process was beneficial, especially to the secondary users of datasets, as it facilitated the proper understanding, interpretation and use of the data.

After carrying out an initial review of data and associated documentation, there were five steps to standardizing data:

- (a) Preparation of the data file which involved merging household and individual data files, screening data for inconsistencies, renaming variables into alpha numeric variables which were in Spanish and assigning variable values and labels to avoid blanks in the dataset;
- (b) Creation of additional variables at the individual level such as those that related to education, economic activity and income;
- (c) Creation of additional variables at the household level such as those that related to characteristics of the head of household, composition of households and total income for the household;
- (d) Preparation of supplementary documentation including a data dictionary of variables and labels that matched variables to survey questions and a manual that outlined the survey methodology and questionnaire; and
- (e) Documentation of all procedures used throughout the standardization process in an administrator's manual, for use by ECLAC and the country.

Agenda item 10b Caribbean Household Survey Databank (CHSD)

The second segment on the topic of the CHSD involved a demonstration of the online platform, which was presented by the representative of ECLAC Headquarters, Santiago. Participants tested the functionality of the databank. Saint Lucia's SLC was selected as the forum's example for extracting results from the micro dataset. Other ranges were specified, such as the option for person/household level and with or without the expansion factor. The ECLAC representative then gave a very short demonstration of the Banco de Datos de Encuestas de Hogares (BADEHOG) system, which was the Latin American version of the CHSD. The CHSD was an online system that granted approval to users and then allowed them to define both the parameters and types of tabulations that they wished to calculate. Results were generated within the system and micro data were not given directly to the user.

Agenda item 11 Caribbean Household Survey Databank (CHSD)

Participants were then invited to make comments or criticisms about the databank. One question asked during this session was if users would be able to add information themselves. In response, the ECLAC representative stated that the dataset ought to first come through the ECLAC Subregional Headquarters for the Caribbean, however, if

countries wished to add their own data publications, then this was possible. The system was really designed for the intermediate user, allowing them to tabulate queries using micro data without actually accessing the micro data.

Overall, participants were impressed with the CHSD.

Agenda item 12 **Customizing Micro Data for Public Use**

The representative of the Minnesota Population Centre, University of Minnesota, made a presentation on “*Customizing Data for Public Use*”, which comprised shock factor principles of statistical confidentiality and the Integrated Public Use Micro Data Series (IPUMS)-International project.

He stated that NSOs around the world worked extremely hard to keep official statistical data confidential and after four decades of disseminating micro data, there had never been a single allegation of a breach of confidentiality. He said that it was important to disseminate the data developing reality-based policy, building trust, having the ability to replicate data and assess data quality. The problem, however, was that overcoming issues of confidentiality. NSOs should not share their data unless they were absolutely sure that there was little to no risk of compromising confidentiality.

He described the three types of data usage; onsite usage where the user came into the office in order to access the data, and off-site usage where the user obtained the data and then applied his own software to the analysis. Off-site usage had dominated over the years and was the technique utilized by the IPUMS system. The third type of data usage was similar to the ECLAC CHSD where the user could only manipulate the data within range of the system and obtain results.

He described the types of confidentiality protections that IPUMS used as a foundation for their service and demonstrated the process of applying for access to the IPUMS system. Finally, he outlined the strengths of his organization, including the uniform legal authorization they had with NSOs, the restricted access to academics who ought to abide by the confidentiality protections, the strong technical methods used to anonymize micro data, the proven web-based access management system and the financial sustainability of the programme.

Agenda item 13 **Customizing Micro Data for Public Use**

After the very thorough description and demonstration of the IPUMS system, participants discussed customizing micro data for public use. Initial concerns were about the difficulties associated with the enforcement of a one-year license between IPUMS

and users. The IPUMS representative explained that the license renewal was virtually automatic and users were invited to renew their agreements, which was considered more practical than granting perpetual access. It was also mentioned during the discussion that Germany had confidentiality issues in the past which made it very frustrating for researchers in the 1980s. A further comment pointed out how ineffective it was to conduct censuses and then restrict the academic community's access to the data or anonymize datasets to the point of uselessness. After confirming that Germany was currently on board with the IPUMS programme, the representative agreed that there was no point in collecting valuable data without communicating and sharing with the scientific community. He further stressed that some countries considered joining IPUMS, however, should any doubts arise, the University of Minnesota would return everything at the country's request.

Participants commented on the fact that each country would represent a specific case when determining which variables to suppress. The IPUMS representative agreed that the anonymization process did not involve a "one size fits all" approach. The organization took into consideration each country's situation and NSOs could specify which variables they wanted to suppress. The forum was also concerned about the special case of microstates with a population of less than 100,000 for example, and how that would affect the use of their datasets. In response, the presenter stated that Saint Lucia was an experiment and IPUMS would like to incorporate a researcher to test the usefulness of this small dataset sample.

The participants then asked for suggestions on how small NSOs with limited capacities could manage the monitoring of the use of their datasets. The IPUMS representative acknowledged that problem and described his organization's solution to provide a Global Package of Protection to countries which would be welcome to participate and advise in the process.

Another valid point agreed upon during the discussion, was that anonymizing data should be a standard module in data processing training programmes. This would help with NSO confidence in their preparation and capacity to share their micro datasets. Participants also thought that promotional tools such as a logo to the IPUMS website would be useful in endorsing both the NSO and the IPUMS sites, something that was already in the works.

Agenda Item 14a

International Household Survey Network (IHSN) Metadata Format

The "*International Household Survey Network (IHSN) Metadata Editor Format*" was delivered by a representative of Saint Lucia. The objective of her presentation was to demonstrate the importance of good metadata and to introduce international standards and good practices. She stated that micro data was documented to: (a) to help users understand what the data were measuring and how they were created; (b) to help users assess the quality of the data; (c) to help users find the data they were interested in; and (d) to increase the credibility of the data.

She mentioned that good documentation, from the end user point of view, was indicated by datasets that were easy to use and understand. From the data producer's perspective, however, good documentation provided credibility and transparency to results and allowed for the replication of data collection. Furthermore, she stated that the documentation of data should begin from the moment that it was determined that data were necessary. Unfortunately in many instances, documentation was often the last step of the survey process, when instead it should continue at every step of the way. She confirmed this notion by reflecting on developing countries where the status of metadata was very poor. There had been some progress, however, with the adoption of international XML metadata standards which provided a rigorous framework for documenting surveys and censuses.

On that note, she then introduced the Micro Data Management Toolkit which comprised three items including the Metadata Editor, Nesstar Explorer and CD Rom Builder. She elaborated on the Metadata Editor which was a complete metadata authoring tool developed by the World Bank and used to convert, document, edit and publish micro datasets. A brief tour of the Metadata Editor was then given by the presenter using Saint Lucia's SLC as an example, following which she gave a brief account of its sections, including descriptions of the document, study, data file, variables and other materials.

In closing, some of the presenter's final recommendations to the forum were to adopt international metadata standards, formally document all stages in the production process, record survey deviations, keep a central file, and ensure accessibility to persons in charge of metadata and plan for documentation at the onset of any survey programme.

Agenda item 14b **Caribbean MDG Meta Databank**

The Social Affairs Officer at the ECLAC Subregional Headquarters for the Caribbean gave a brief presentation on the Caribbean Meta Databank. She mentioned that due to the many workshops that had been held and the numerous amounts of surveys and administrative data relating to MDG monitoring, reports tended to get very complicated. In order to alleviate some of the resulting difficulties, a meta databank for MDGs had been created with the goal of disseminating this valuable information. The Caribbean MDG Meta Databank could be used at the national level and allowed for comparisons at the regional level. The presenter also gave a short illustration of the upcoming online platform where a country and MDG indicator could be selected in order to obtain the relevant metadata such as methods for computations and limitations etc. Unfortunately however, she mentioned that there is a lack of information for many countries and invited the participants to report on the development of their MDG indicators for dissemination. With a greater compilation of data, the databank can serve as a practical tool in not only demonstrating the usefulness of metadata but also in achieving Millennium Development Goals.

Agenda item 15

IHSN Metadata Format and Caribbean MDG Meta Databank

Participants asked if the IHSN toolkit would replace the Census Administrative Report. In response it was stated that the toolkit would not replace the administrative report but would aid in its production. The software reminded users of several basic elements of the report through its systematic approach to documenting. All developments to the survey process could be included at any time which, in turn, provided more complete information which could be included in the administrative report.

Participants endorsed the use of the IHSN toolkit and asked how they could obtain the software. In response, it was pointed out that the software was free and countries were only required to register with the World Bank which fully promoted the use of the system, as they were also big users of datasets.

Interest in the Caribbean MDG databank was also expressed by workshop participants who wanted to know when the information would be available online and if the database was complete and up-to-date. It was noted that the databank was only as complete as the information it contained, hence the onus was on countries to submit their information in order to populate the database. It was hoped that online access to the MDG databank would be available for review after two weeks of fine-tuning.

One valid point was the fact that the lack of metadata was really a problem with regard to how household surveys were prepared in the Caribbean. The forum agreed that documenting micro data after the fieldwork had been conducted was not the right approach and, ideally, the concept of metadata needed to be incorporated directly into survey methodology and first principles. Participants also agreed that perhaps a workshop on metadata would benefit survey processes in the Caribbean.

Agenda item 16

Caribbean household surveys: Recommendations for the way forward

Recommendations of the workshop

Workshop participants agreed upon the following recommendations:

- Plan for future training workshops on the IHSN Metadata Editor and on procedures necessary for anonymizing datasets;

- Encourage more cooperation and communication among countries on the difficulties encountered and the lessons learnt from conducting household surveys;
- Institute a coordinated, systematic training programme on basic fundamentals in statistics with continuous funding;
- Encourage continuing CARICOM support for training programmes so that countries could progress towards statistical development together;
- Sustain capacity development through technological advances such as online courses and video cameras;
- Strategize a multi-annual survey programme for countries in the region;
- Further emphasize the use of administrative datasets especially with the labour market;
- Encourage countries to develop dissemination policies for micro datasets and
- Improve on analyses through both local and international partnerships.

The Way Forward

ECLAC had standardized several household survey datasets and this was currently its major outstanding activity for the project, which officially closed in September 2009. ECLAC would welcome accumulating more datasets from the various participating countries.

Agenda item 17 Closure of the workshop

ECLAC thanked all participants for giving their time and contributions to the workshop, which was concluded with the usual exchange of courtesies.

Annex I

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Annex II**Workshop Agenda**

1. Welcome and opening remarks
2. Overview of the meeting and introductions
3. Presentation on Outputs of Household Survey Project
4. Discussion on Outputs of Household Survey Project
5. Presentation on Methodologies in Household Surveys – The Latin American experience
6. Presentation on Methodologies in Household Surveys – The Caribbean experience
7. Discussion on Methodologies in Household Surveys
8. Country Presentations on future plans for conducting surveys and policies for sharing micro data
9. Discussion on Country Presentations
10. Presentation on the Caribbean Household Survey Databank (CHSD)
11. Discussion on the CHSD
12. Presentation on Customizing Micro Data for Public Use
13. Discussion on Customizing Micro Data for Public Use
14. Presentation on the IHSN Metadata Format
15. Discussion on the IHSN Metadata Format
16. Caribbean Household Surveys: Recommendations for the Way Forward
17. Closure of the Workshop