

CONSERVATION AND SUSTAINABLE USE OF THE BELIZE BARRIER REEF COMPLEX

UNDP/GEF project BZE/98/G32/A/1G/99

INDEPENDENT FINAL PROJECT EVALUATION

**Prepared for UNDP/GEF,
European Union
and
The Government of Belize**

by

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The activities of CZMAI involved a far-reaching network of people with a deep conviction for integrated coastal zone management. Those contacted in the course of the evaluation were fully convinced of the need to continue the efforts of the Coastal Zone Management Authority and Institute. We thank those who were in country and made themselves available in the brief time of the evaluation. The team is convinced that this representative sample is a solid indicator of the rewarding discussions that would have taken place had it been possible to speak with each and every person involved throughout the life of the project.

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LIST OF ACRONYMS AND ABBREVIATIONS

BACONGO	Belize Association of Conservation NGOs
BAS	Belize Audubon Society
BBRC	Belize Barrier Reef Committee
BTB	Belize Tourism Board
BTIA	Belize Tourism Industry Association
CCBTIA	Caye Caulker Branch BTIA
CAC	Coastal Advisory Committee
CBO	Community Based Organization
COMPACT	Community Management of Protected Areas
CZM	Coastal Zone Management
CZMA/I	Coastal Zone Management Authority/Institute
DOE	Department of the Environment
EIA	Environmental Impact Assessment
EU	European Union
FAMRACC	Forest & Marine Reserves Ass'n of Caye Caulker
FON	Friends of Nature
FOSC	Friends of Swallow Caye
GEF	Global Environmental Facility
GIS	Geographic Information System
GOB	Government of Belize
GPD	Geology and Petroleum Department
ICZM	Integrated Coastal Zone Management
LIC	Lands Information Center
MED	Ministry of Economic Development
MNR	Ministry of Natural Resources
MPA	Marine Protected Area
MPAAC	Marine Protected Area Advisory Committee
NPAPSP	National Protected Areas Policy Systems Plan
NEAC	National Environmental Appraisal Committee
NEAP	National Environmental Action Plan
NGO	Non-governmental Organization
PACT	Protected Areas Conservation Trust
PIR	Project Implementation Review
PSC	Project Steering Committee
GEF/SGP	GEF Small Grants Programme
TPR	Tripartite Review
UNDP	United Nations Development Programme
WCS	Wildlife Conservation Society
WHS	World Heritage Site
WRI	World Resources Institute
WWF	World Wildlife Fund

1. EXECUTIVE SUMMARY

This report presents the findings and recommendations of the independent final evaluation of UNDP/GEF project BZE/98/G32/A/1G/99, ***Conservation and Sustainable Use of the Belize Barrier Reef Complex*** which was implemented from May 1, 1999 through July 31, 2004. The objective of this evaluation is to fully review and assess the results achieved by the project during the period of implementation as well as their impacts and sustainability. The evaluation was conducted by a team of three consultants (two international, one national) in accordance with the UNDP/GEF Monitoring and Evaluation (M&E) policy at the project level. It consisted of a desk review of key documentation and reports on project activities prepared over the five-year span of the project, several field visits, and 43 interviews in Belize during the period of November 15–24, 2004 with key stakeholders within government, NGOs, academia, the private sector, as well as Project and UNDP-Belize staff.

This project began in mid-1999 and builds on the achievements of a pilot phase initiative (1994-1998) that responded to concerns regarding impacts to the coral reefs and other coastal habitats by inappropriate coastal development involving dredging and land reclamation, and the run-off of sediment, agricultural chemicals and sewage. Further, several of the marine protected areas had inadequate on-the-ground management, and generally there was the need for more community involvement in coastal resources management. The need was also recognized to continue the public awareness campaign to increase the understanding of coastal zone management, targeting specific audiences. Moreover, a financing mechanism that would ensure the sustainability of the programme was lacking.

This project therefore aimed to support the Government of Belize in addressing these needs and consolidating the integrated coastal zone management programme by undertaking targeted interventions for biodiversity protection in a sustainable manner. These measures include:

- strengthening the planning, management and operation of a network of 7 marine protected areas (5 of which are World Heritage Sites);
- integrating development planning on the cayes with marine biodiversity conservation principles;
- developing a sustainable financing mechanism;
- establishing legal and institutional capacities for facilitating bioprospecting; and
- complementing widespread environmental conservation advocacy with coastal and marine biodiversity concerns.

The goal of the project is to secure the conservation of options and existence values embodied in the Belize Barrier Reef Complex. The project purpose is to provide decision-makers and relevant stakeholders with analytical, management and technical capacities, decision making and planning tools, and financial mechanisms and economic instruments for long-term conservation of coastal and marine biodiversity.

The project was executed through the Ministry of Fisheries (now, Ministry of Agriculture and Fisheries). The implementing agency is the Coastal Zone Management Authority and Institute (CZMAI), with its Board of Directors acting as the Project Steering Committee. There are 6 project objectives:

1. Consolidate capacity to effectively integrate biodiversity conservation concerns into a Coastal Zone Policy Framework;
2. The Belize Barrier Reef Marine Protected Area Network is established and fully functional;
3. Caye development plans are integrated with marine biodiversity conservation concerns through a demonstration project;
4. A sustainable financing mechanism for marine biodiversity conservation is established and operational;
5. Legal and regulatory capacities for facilitating bioprospecting agreements are in place; and
6. Training, awareness-raising and information dissemination activities garner public support for biodiversity conservation through coastal zone management and the barrier reef protected area network.

Integrated Coastal Zone Management in Belize, and in turn the conservation and sustainable use of the Barrier Reef Complex, is at a crossroad. Major advances have been made since an initial exploratory workshop on ICZM in San Pedro in 1989 and the initiation of the original GEF-sponsored project in 1993. Yet at the conclusion of two phases of GEF/UNDP donor support over the past ten years, serious questions remain as to the capacity and commitment of the Government of Belize to assume the responsibility for the long-term challenges and opportunities inherent in the coastal resources of Belize and to truly support an integrated coastal zone management program into the future.

At the time of this evaluation, four months after the project ended, a depressing situation was evident at the headquarters of the CZMAI in Belize City. Most of the offices were empty, computers and office equipment sat idle, there was almost no program continuity, boats and vehicles remained parked, many in need of repair, and there were almost no financial resources available. The most troubling situation was the lack of corporate leadership, a chronic problem at the Board of Directors level for some time.

Whatever satisfactory outcomes had been achieved by the UNDP/GEF project during its five-year duration, and these were numerous, it was obvious that the National Institution itself was failing. Even as many project activities can be checked off as successfully accomplished, CZMAI, the national institution, is at present time floundering as a result of poor management and lack of vision and commitment for the future.

It is clear, 8 months after the end of the project that the project's most lethal short-coming was the inability to develop sustainable finance to maintain and expand on the achievements obtained during project implementation. The issue of financial sustainability is inherent in the CZM Act, explicit in this UNDP/GEF/EU project's objectives, and has been the subject of several studies, consultations and internal discussions between 2000 and 2004. This work provides a wealth of information and ideas on how to operationalize a financing system for ICZM and its MPA network. However, the design of the UNDP/GEF Project contained a major flaw in that it greatly underestimated the resources needed to achieve sustainable finance. It focused on identifying a mechanism for sustainable finance rather than including a provision for full-time, specialized personnel to pursue the many ideas and recommendations, and implement those that proved most feasible.

Thus, the project has come to a close without a clear and satisfactory resolution of this central issue, nor the staff or institutional capacity to pursue it. As the project wound-down, the staff complement was cut from 26 down to 7, allowing little more than a care-taking mode to be realized since mid-2004. There is currently no CEO or Director in place and the Board of Directors has become inactive. The Advisory Council is to be commended for its diligence in continuing to convene at this juncture, but its advice currently has nowhere to go.

Since sustainable finance is a necessary condition for resuscitation of the CZMAI, the development of a small Sustainable Finance Unit, housed within a re-constituted CZMAI, with the requisite capacity, mandate and political support, is the key to moving forward.

Thus, the most immediate requirements for achieving sustainable finance of the CZMAI are: the development of a specific and practical action plan; a proposal to develop a Sustainable Finance Unit (SFU) within CZMAI; and to implement an aggressive search for funding to implement the proposal. Within this context, it would seem a logical move for UNDP/GEF to consider the use of GEF project development funds to generate the CZMAI – SFU action plan and proposal, and a medium sized-grant to get the SFU up and running. In this way, the already considerable investments of UNDP/GEF could be “made whole” by assuring the survival of the CZMAI. A project of this nature would, however, need to run in parallel with the revision and strengthening of the BoD, and utilization of the various funding possibilities and in-kind services already identified that would make possible the slow but sure resurrection of the technical capacity of the CZMAI.

This issue, more than any other, is critical to the long-term success and sustainability of ICZM and biodiversity conservation in Belize. Nationally, it is recognized that financial sustainability is a challenging but important issue, especially given the macro-economic context and the high importance of the natural assets to economic development, especially the tourism and fishery sectors. The excessive reliance on external funding and an inability to achieve sustainable financing, besides significantly affecting national investment in ICZM, will undoubtedly negatively affect Belize’s reputation and standing with international donors.

The main challenge is to improve the institutional arrangements and their performance and to finalize mechanisms for financial sustainability that will facilitate the transition from ‘project’ to a more permanent and operational ICZM ‘program’ that has a clear mission, vision, role, mandate and adequate resources to effectively conserve and use the natural resources of coastal Belize and its barrier reef system.

Preceding evaluations and interim assessments of this project concluded an overall satisfactory performance rating with recommendations for prioritizing with urgency, key areas in the then remaining time. The findings of this final evaluation team concur that many outcomes achieved while the project was operational are to be applauded, but we note several important areas of deficiency in the overall achievement of the project objectives and intended outputs.

For the outputs that have not been fully realized, much of the groundwork for their full implementation has been laid. However, as the project concluded, a sustainable path forward - to take these efforts from an externally-supported project to a business-oriented national program - has not been completed and most of the staff of the CZM

Authority and Institute has left. Many of the essential coordination and financing arrangements for long-term sustainability of the project's objectives remain on hold and the important work of the Institute – data management, education, provision of advice on proposed developments, etc. – is not taking place. This is seriously diminishing the quality and timeliness of key decisions that affect critical coastal and marine resources and biodiversity in Belize.

National political commitment for ICZM was demonstrated early in this process through the approval of the CZM Act, the establishment of the CZM Authority and Institute (all in 1998), the adoption of the National ICZM Strategy in 2003, and by funding the policy/coordination functions of CZMA. Some ministries have included CZMA on their advisory bodies (e.g., NEAC, Land-utilization Authority) to provide technical advice. However, the worsening economic conditions facing Belize have clearly constrained the Government's ability to focus on and continue to support the essential priority of this program at levels necessary to achieve project outcomes over the long-term. While acknowledging the challenges faced by government in light of so many competing priorities, the GoB has not transmitted clear signals concerning the shape this support and program will take.

With invaluable support of the Government of Belize, UNDP/GEF and the EU, the CZM Authority and Institute has successfully developed a National CZM Strategy; built (although not maintained) valuable technical capacity; developed widely supported and broadly distributed development guidelines; established programs for native endangered species, and water quality and coral reef monitoring programs; established participatory processes for decision making on coastal resource use; provided numerous opportunities for stakeholder participation in the planning and management of those resources; built a national database; and increased national awareness and appreciation of a wide range of coastal resources issues. State-of-the-Coast reports indicate that reefs are recovering from hurricanes and are generally healthy. Water quality in the coastal zone continues to maintain good quality and flagship manatee populations remain healthy and reproductive capacity is good.

There are a number of factors, however, some unpredictable, others that could have been anticipated, recognized and addressed earlier in the project, that threaten the long-term sustainability of the good work that has been conducted. These factors range from exigent macro-economic conditions, institutional malaise, a 'project-vs.-program' perspective, an insufficient appreciation within government of the objectives and benefits of ICZM, and the inability to implement sustainable financing despite this being a pre-condition in the Act and in justifying UNDP/GEF funding.

The evidence gathered by the Evaluation Team leads us to rate the attainment of the project objectives and outcomes as indicated in the following table (HS = Highly Satisfactory; S = Satisfactory; and U = Unsatisfactory, as defined in the Monitoring and Evaluation policy at the project level for UNDP/GEF). The evaluation team feels strongly that the assessment of project outcomes must be rated separately for (i) what was achieved during the life of the project and (ii) their sustainability. While this is not called for in the UNDP/GEF evaluation framework per se, our findings cause us to assign ratings accordingly in order to give a fair and realistic assessment.

#	Outcome	Rating	
		In-project	Sustainability
1	Consolidate capacity to effectively integrate biodiversity conservation concerns into a Coastal Zone Policy Framework	S	U
2	The Belize Barrier Reef Marine Protected Area Network is established and fully functional	S	S
3	Caye development plans are integrated with marine biodiversity conservation concerns through a demonstration project	HS	S
4	A sustainable financing mechanism for marine biodiversity conservation is established and operational	U	U
5	Legal and regulatory capacities for facilitating bioprospecting agreements are in place	U	U
6	Training, awareness-raising and information dissemination activities garner public support for biodiversity conservation through coastal zone management and the barrier reef protected area network	HS	S

During implementation it became clear that the project objectives and implementation strategy were both relevant and pertinent to the threats and opportunities identified, with two significant exceptions: sustainable finance, and the designation of the BoD as the Project Steering Committee. The degree of effort required to achieve sustainable finance was severely underestimated and constrained to a degree by the logical framework itself; rather than focusing on developing the institutional capacity of the CZMAI for sustainable finance, the project sought to identify a single funding mechanism. This led to considerable study and discussion of potential funding sources, but no effective implementation of any of them. Without full-time specialized staff, adequate institutional and administrative mechanisms, and political support, sustainable finance remained a theoretical concern rather than actionable program. The choice of the BoD, the composition of which was spelled out in the CZM Act, as the Project Steering Committee was also an error in project design that was not corrected during project implementation. The BoD did not function as designed because the Chair did not rotate, eliminating the possibility of creating ownership among the Board Members. The requirement for a quorum of Government CEOs meant it was extremely difficult to get a quorum for a meeting, and as a result, urgent issues went unresolved.

UNDP/GEF has been a key partner for the Government of Belize during both the pilot and the most recent phase of this project over the past ten years. Their oversight, participation and facilitation skills have enabled the program to evolve in an incremental and positive manner. UNDP country office personnel are very knowledgeable about this project, its progress and the country context within which it is being carried out. The Assistant Resident Representative has been an observer/participant at CZMAI BoD meetings and UNDP staff have facilitated several strategic planning sessions.

However, the risks to institutional and financial sustainability were apparent mid-way through the project and UNDP should have intervened more firmly with respect to obliging the Government of Belize to resolve these issues. While recognizing the inherent sensitivities in working closely with a partner government and acknowledging UNDP's repeated efforts to make its views known to the Government of Belize, its approach was perhaps too conservative. There should have been in place a firm process of handing over responsibility from the donor to the Government with clear checks and accountability measures along the way. As a partner in development, UNDP's role needs to be both the provider of incentives (e.g., financial support and

professional business management) and the agent of accountability (for results and country ownership and ability to withhold or re-direct funds).

The Project would have been better managed if the Project Steering Committee had been made independent from the BoD of the CZMAI. UNDP/GEF could have helped make up for the inaction of the BoD by establishing an effective and independent Project Steering Committee. This error in project design may not have been obvious at the beginning, but by mid-project the deficiencies of the BoD were clear, but no action was taken to activate an alternative project Steering Committee.

While UNDP-GEF may be reluctant to provide further support to the Government of Belize, this decision should be considered in a broader context. That is, donor support to this project has been significant and sustained over the past ten years; cutting off all avenues of further support, particularly during a time when the government is facing significant fiscal challenges, could result in the loss of the total investment. UNDP should continue to work with the Government to help them develop and put in place a process for financial and institutional sustainability, perhaps through a smaller, medium-sized project, GEF Small Grants, and access to other sources of partner and donor support. This should, however, be contingent upon a clear commitment by the Government to assume responsibility for long-term ICZM in Belize, to make whatever core contributions it can within its capacity, and to develop a comprehensive business plan that would include a much more diversified portfolio of financial and partner support.

In future UNDP/GEF-supported projects, a much clearer and firmer contractual obligation should be in place with recipient countries, to ensure that transition from donor-supported project, to country-supported program is ensured. A series of successive indicators of financial sustainability during the life of the project would help to track the situation.

The Government of Belize is to be congratulated for its foresight and commitment in the passing of the Coastal Zone Management Act (1998, revised 2000) and the creation of the Coastal Zone Management Authority and Institute (CZMAI). This early commitment to provide the legislative and institutional framework for ICZM is commendable and sent a clear signal to government ministries and other stakeholders about the importance of the coastal zone and the Government's commitment to managing it in an integrated manner.

The adoption of the CZM Act has given the CZMAI important statutory standing within the Government structure and the authorization and mandate to develop a comprehensive coastal zone management plan. The first step was the production of a National ICZM Strategy that was developed through a broad consultative effort and endorsed by the Government in 2003. This evaluation team concurs with the conclusions of the mid-term evaluation that the Strategy is a comprehensive, understandable and practical product and that the planning process to produce the Strategy was laudable. The CZMAI has used the Strategy as a guide for implementing its activities and in developing its strategic plan for the future. Of positive note, other government and NGO partners often refer to the Strategy in developing programs and initiatives for coastal and marine resource management. The project has collaborated with other agencies in influencing the creation of additional policies and laws, such as the Fish Spawning Aggregation regulations, the draft Aquaculture policy and the Land Use Plan.

Further positive developments include the preparation of the draft Cayes Development Policy (2003), draft Coastal Development Guidelines (2003/04) and the adoption of the standard MPA entrance fee.

The CZM Institute was a multi-disciplinary technical institution that assembled, trained and built the capacity of its professional staff (more than 26 technical experts) to form a competent, committed and respected resource that was viewed by colleagues and the public as a valuable, non-partisan resource dedicated to the sustainable management of coastal resources. Through significant ongoing investments in the technical capacity of the Institute's staff throughout the project, there were in place highly trained personnel in specific areas of expertise relevant to needs in the Belize coastal zone; unfortunately, most of the staff is now elsewhere. Nevertheless, the establishment of baseline data and monitoring programs, in particular coral reefs, endangered and indicator species (e.g., manatees) and coastal water quality, ensured that these programs provided data on the long-term status and threats to the Belize coastal zone. The establishment of the Institute has had a national impact and has also been recognized regionally and internationally. Further, many projects have benefited from the multi-disciplinary comments, solid scientific and technical information and legal advice, provided by coastal experts at the CZMAI. The Institute has been acknowledged by its government colleagues for its role in this regard.

The Coastal Zone Management Advisory Council was created to advise the Authority and Institute on technical matters; formulate draft policies, plans and programs relating to ICZM when requested; facilitate and encourage the sharing of information among government agencies, NGOs and educational institutions; comment on EIAs for coastal developments and review the ICZM Plan. The Advisory Council has played a significant role in the multi-disciplinary review of project developments in the coastal zone and in coordination between agencies.

Unfortunately, this significant capacity to guide the delivery of ICZM in Belize (Authority, Institute, Advisory Council) was all but lost at the close of the project when UNDP/GEF resources were expended, most of the staff left as of April 30, 2004 and the CEO of the Authority and the Director of the Institute resigned their positions. Only a skeleton staff remains in place at this time, largely in a care-taking mode. An acting Director of the Institute has been attempting to keep the institution functioning since mid-2004, albeit at a minimal level. Further, the re-organization of government Ministries and concomitant roles and responsibilities, and the scramble for sustainable financing, particularly in the latter months of the project, have made it challenging for the key parties to maintain a focus on long-term goals.

There is a dichotomy of opinion as to whether the core problem with the current CZMAI is one of management or structure.

The Board of Directors (BoD) of the CZM Authority is the central body for coordination of ICZM in Belize. An institutional rationalization study conducted in 2004, a Board Strategic Planning session and this evaluation, revealed a consistent view that the Board of Directors of the CZMA is not functioning as it should.

In practice, the program has suffered from a lack of leadership, commitment and due diligence from the Board. Board meetings have not been regular or well attended, with

quorum often not being achieved. This has constrained timely and well-informed decision making on key issues of importance to the program. Many of the senior representatives from line ministries struggle with the inherent conflicts of interest in being a sectorally-oriented regulatory agency and guiding a broad-looking inter-disciplinary body at the same time. Issues of ministerial jealousy and turf protection were cited often. Discussions around controversial issues were often deferred, advice from the Advisory Council was seldom if ever received by the BoD, and some Board members acknowledged that they did not have the appropriate level of understanding of ICZM processes and issues. There is a lack of performance accountability for individual Directors and no built-in compliance procedures to implement and/or enforce decisions. The Chair of the Board did not rotate as specified in the Act. There is also some confusion with respect to the role of the Authority and Institute in relation to the legal responsibilities of Ministries.

Given the growing scope of alliances and partnerships, the membership of the BoD and Advisory Council might be re-examined; perhaps providing ex-officio status to other members until a package of amendments to the CZM Act can be brought forward. Also to reflect the intended balance of interests on the Board and Advisory Council, the Chair's position should be rotated every 6 months or one year. This would lighten the load on any one individual or office and encourage more active participation by the other members.

Interviews conducted during this final evaluation revealed a desire by many to re-assign the institutional home of the CZMAI from the Fisheries Department to another Ministry with a less sectorally-limited mandate and the ability to prioritize ICZM within Cabinet. Many perceive the Ministry of National Development to be the appropriate institutional home for the CZMAI. The Ministry of Natural Resources was also suggested. A decision in this regard will be made by the Government of Belize.

The 2004 Rationalization study recommended, many stakeholders believe, and the BoD observed that there are strong recommendations to separate the Institute and Authority. It is recommended that the Authority should remain a semi-autonomous policy and coordinating body funded by Government, and that the Institute should be a legally independent, public-private body autonomous from Government.

Discussions have been underway to re-align the CZM Institute and its research capacity with the University of Belize (UB). The two institutions are currently negotiating a General Agreement for Institutional Cooperation to jointly develop coastal and marine education programs, training and research for Belize. The Institute could be established as an associate or affiliate of the UB, while retaining its independence and full responsibility for its administration and finances. As an associate of UB, CZMAI would provide research and educational support to the university while fulfilling its national mandate for scientific monitoring, research and training for coastal and marine resources

Although the annual project reports indicated that there were problems with timely disbursements at the beginning of the project, all project funds were expended by project's end. Co-financing commitments have been largely honoured. Yet, the situation encountered at the time of evaluation indicates that the cost-effectiveness of the project investment has been low. The CZMAI is a non-functional institution at present, and the technical capacity and experience developed during the project is now largely gone from the Agency, but not necessarily from Belize. Some project benefits

remain, including public awareness, species research, the library collection, the system of functioning marine protected areas, the coastal zone management strategy, and draft guidelines for coastal development.

The Belizean civil society sector, comprising mostly NGOs, has significant and meaningful involvement in interventions to improve the quality and sustainability of the environment and its natural assets. The strengths and diversity of the NGO community in Belize, and moreover the supporting role which NGOs such as the Belize Audubon Society have played in furthering environmental issues in general and CZM issues in particular, is noteworthy. The contribution of non-governmental organizations and individuals to this project over the past five years, e.g., participation on committees, working and Advisory groups, is close to BZ\$350,000.

Community participation through Community Advisory Committees (CACs) in decision making governing the use of coastal and marine resources has had broad impact. The CACs provide the structure for sustained community participation in coastal resource management and decision making through their empowerment and ownership. Until the CAC process was initiated, there had been little comprehensive land-use or community planning in Belize and the general public was not often provided meaningful opportunities for input.

Today, there are CACs in place for each of the eight planning regions, which cover the entire Belize coastal zone. The key stakeholders who comprise the members of the CACs in each region have received basic training in conflict resolution, consensus building, leadership skills, and mechanisms for conducting effective meetings, thereby empowering the CACs to fully participate in the development of the guidelines and monitoring of their implementation.

The public information and education component of this project has been productive and widely acclaimed by target groups such as fishers, local communities and tourism stakeholders and cited as one of the most important techniques to bring about long-term environmental awareness and action. The general level of knowledge and experience related to biodiversity conservation in the ICZM context has increased dramatically within the project area at all levels. Through this medium, user groups are better prepared to make informed decisions on the use of coastal resources to ensure the sustainability of their livelihoods.

The project has cultivated a general public awareness and support for biodiversity conservation. The education and public awareness program under the project has achieved national impact, particularly with flagship species like the manatee. There has been a significant increase in awareness of coastal resource issues and marine conservation through the targeted education and public awareness activities implemented. In addition, the project has developed the capacity of several key stakeholder groups such as fishers and tour guides/operators through programs on tour guide training. State-of-the-Coast reports, the Coastline newsletter, technical reports, special surveys, booklets, press kits and brochures were published and widely distributed. The project has been largely successful in developing awareness and a culture for coastal and marine resource management and conservation amongst particularly youth, government agencies, local communities, developers, key interest groups such as tourist operators and fishers, and the public at large. The only notable deficiency in the program was the lack of a clear identification of baseline attitudes and

concerns by stakeholder groups, and the measurement of changes in these parameters during the life of the project.

Technical brochures like Best Management Practices are well received and used. Monitoring and data management systems have been established and have begun to create an essential scientific baseline on the state of the coast. The process of creating the ICZM Strategy paid important dividends such as increasing public awareness and education. Some stakeholders have already embraced the recommended actions contained in the policy where Cabinet approval is not needed.

The CZM Institute was the 'go-to' agency for coastal- and marine-related issues. The Institute was regularly consulted on all coastal development applications for dredging, pier construction, subdivisions, EIAs and coastal infringement reports. The data provided on the state of coastal and marine resources and recommendations produced by the Institute on various issues were generally incorporated into decision making by the relevant government agencies. The technical advice of the Institute staff was considered of high value as they were often the only specialized coastal expertise. It is a great loss that most of these technicians have now left the Institute.

The GIS and Data Center continued to build its database through the completion of the development guidelines and the associated maps for each planning region. Students, universities, government agencies, and others regularly accessed this data. The Center had partnered with WWF to generate maps of the MPAs and critical species.

The two major sectors that have seen improvement in practices have been the fishing and tourism industries. As a result of education and public awareness programs, and closer coordination with stakeholders, both industries have focused on creating sound industries through sustainable practices and use of coastal resources. The private sector's support for ICZM and endorsement for the work of the CZMI increased significantly through public awareness initiatives. One of the key deficiencies has been the lack of focus of awareness programs on government officials. This is a priority area for addressing post-project within the long-term implementation of ICZM.

A major component of the Project was directed toward measures to improve the effectiveness of the management of the Belizean system of MPAs. This project allowed many MPAs to move from 'paper parks' into functioning protected areas. Previous to the project, only 2.3% of MPAs were operational. The project has caused this to increase to 51.5% of MPAs being operational (July, 2004). This includes 7 new MPAs established under the project. These 7 MPAs have been operational since 2002, having received all basic infrastructure and equipment. All 5 management plans have been revised and the MPAs are currently utilizing these plans to guide the daily management of the reserves. MPA staff has received the necessary training and basic infrastructure, boats and monitoring equipment, with 24-hour staff appointments.

Financing the MPAs has become the full responsibility of government and co-partner agencies since being transferred from the Project in December, 2003. Both government and co-management partners have secured financing for staff and basic operations through April, 2005. The MPA fee collection mechanism is being developed through guidance from a working group, but its level of activity is uncertain. The co-management partners have been key in leveraging considerable financial support for protected areas management and have contributed significantly to the establishment and strengthening

of the MPA network through their efforts at the site level. However, effectiveness of management is somewhat mixed across the network, depending on the strengths and weaknesses of the NGOs and the oversight of government departments.

Although data and monitoring reports have not been numerous nor has there been sufficient time to identify the trends and impacts that this MPA effort has had on the reef's health and biodiversity, it is clear that the presence of this people management system has deterred illegal fishing and other activities that damage the reef system and has educated visitors and users of the reef ecosystem about more sustainable ways of interacting with it. Due to increased and more efficient patrols, arrests are made routinely for infractions within the MPAs and several of these cases have been prosecuted in the courts, resulting in fines or imprisonment. There is some anecdotal observation that the fish catch has been up during the last few years corresponding to the establishment of reserves and no-take zones.

The CZMAI, when active again, should strive to improve the long-range operational aspects of the MPA network and in the process consider which aspects of it are most germane to the CZMAI broader coastal management mission (e.g., CZMAI – coordination, policy development and research, technical assistance, public information and education; as distinguished from – MPA management, patrol and enforcement, maintenance and other functions more germane to Fisheries). There are also opportunities to maximize the synergistic benefits of other programs, in particular the ambitious Mesoamerican Barrier Reef System project.

The development and maintenance of a truly useful and comprehensive monitoring program for the Belize coastal zone and Barrier Reef would represent a huge cost for any one agency or program. The project has taken several steps to build the capacity for baseline and ongoing monitoring, research and data management. These are essential elements for informed management decisions. Many Belizean agencies looked to the Institute for technical and scientific information and analysis.

CZMAI is one of only two GIS-equipped offices within Government and the data centre had great capacity for assisting partners with planning, assessment and educational activities. It was also a potentially strong revenue generator. The CZMAI, once reconstituted, should continue to develop its excellent data management and GIS systems and also evaluate and conduct a market feasibility study / needs assessment to determine the potential of an enhanced GIS capacity as a revenue-generating component of the program.

The positive partnership with the Institute of Marine Studies (IMS) at the University of Belize should also be encouraged to enhance its applied research component especially as the academic faculty and degree program are moved into the IMS.

The development of an ICZM framework and coastal development guidelines for Belize's coastal zone is a significant achievement which has broad national impact as a national plan guiding the use and development of coastal resources. Draft development guidelines for all eight planning regions have been prepared and validated by the stakeholders in each region via the CACs. These, together with the Cayes Development Policy, form the basis for the CZM Plan.

Practical guidelines have also been developed for Tourism Best Practices, marine dredging, community development guidelines and policy development for current and future coastal resource challenges. In addition, the Cayes Development policy outlines guidelines for shoreline development, waste disposal and water use for the cayes. Compliance plans for EIAs are issued for developments on the cayes, which incorporate recommendations from the development guidelines for each coastal region and the Cayes Development Policy.

The Caye development plans continue to be consulted by the various decision-making agencies and institutions. Their use has been made mandatory by the Department of Environment when considering development along the coast and on the cayes. This mainstreaming of the plans into coastal planning is a positive sign of continuity and sustainability of the initiative started under this project.

In order to sustain and implement the National ICZM strategy and an ICZM program, a financing mechanism must be identified and a framework for sustainability implemented. A path-forward on financial sustainability should be organized into (i) Immediate (2005); (ii) Mid-term (2006-2008); and (iii) long-term (2008–beyond) strategies. The proposed Sustainable Finance Unit would have the immediate responsibility to identify and rank the priority actions. The following actions are offered as a starting point.

Immediate:

- A corporate-oriented Board of Directors develop the CZMAI image, products and services and market to develop income lines
- The GoB provide ongoing financial support/appropriations of CZMA (approve budget for 05)
- An interim or new Director of the CZMAI initiate immediate discussions with UNDP for both/either – a transition, medium-size project, and other small project funding
- Accept the resources offered by WCS and WWF for the CZMAI's Director (several months' salary) to initiate fundraising
- Further explore CZMAI-Private Sector partnerships for concessions, but with appropriate caveats (i.e., not forfeiting the lion's share of income earning capability, nor compromising equitable access to the country's heritage)
- Begin preparing applications for Foundation grant-giving and traditional funding grants
- Explore bridging funding with PACT based on a firm strategy for rehabilitation of CZMAI; agreement with PACT to pursue fundraising strategy
- Accept the offer from the World Resources Institute (WRI), through its Reefs-at-Risk Project, to pay the salary for a data analyst at CZMI.

Mid-term:

- CZMAI should pursue a diversified portfolio of funding (fees, taxes, services, donations); reliance on only one industry (i.e., tourism) will subject the fate of the reef and coastal zone to the vagaries of that sole industry
- Explore potential revenues from various licenses and user fees for services provided such as diving fees, sport fishing licenses, coastal development applications, rental of seabed used for piers, jetties, moorings, anchoring, floats, seawalls, etc.

- Link with GEF Protected Areas Systems proposal being led by the Natural Resources department with specific reference to how MPA revenue would directly benefit CZMAI
- CZMAI should investigate the feasibility of charging fees for an expanded set of data centre services, especially to private sector consultants. It would be more cost-effective for some entities to utilize CZMAI's capacity rather than make the substantial capital investment themselves
- Transfer title to the land on which the CZM building sits to CZMAI. Beyond bringing clarity of ownership, this presents opportunities for rental income

Long-term:

- Develop a professional business, marketing and fund-management plan that clearly identifies long-term requirements to sustain and support the Authority and Institute and matches these to viable partners
- Have the CZM Institute recognized as a Centre of Excellence, locally and regionally

2. INTRODUCTION

This report presents the findings and recommendations of the independent final evaluation of UNDP/GEF project BZE/98/G32/A/1G/99, ***Conservation and Sustainable Use of the Belize Barrier Reef Complex*** which was implemented from May 1, 1999 through July 31, 2004. The evaluation was conducted by a team of three consultants (two international, one national) in accordance with the UNDP/GEF Monitoring and Evaluation (M&E) policy at the project level. It consisted of a desk review of key documentation and reports on project activities prepared over the five-year span of the project, several field visits, and 43 interviews in Belize during the period of November 15–24, 2004 with key stakeholders within government, NGOs, academia, the private sector, as well as Project and UNDP-Belize staff.

The objective of this evaluation is to fully review and assess the results achieved by the project during the period of implementation (1999-2004), as well as their impacts and sustainability. More specifically, the evaluation assesses:

- (i) the attainment of project objectives and outcomes as documented in the Project's Logical Framework Matrix;
- (ii) Project achievements according to the GEF Project Review Criteria (including Implementation approach, Country ownership/drivenness, Stakeholder participation/ public involvement, Sustainability, Replication approach, Financial planning, Cost-effectiveness, Monitoring and Evaluation);
- (iii) Strengths and weaknesses in implementation which might have affected the project's success;
- (iv) Lessons learned and best practices from the experience of the project and where these can be disseminated and replicated, both to other GEF projects, as well as with national authorities in follow-up to the project; and
- (v) To provide recommendations for a long-term ICZM program and its implementation in Belize based on the performance of the project and issues regarding institutional and financial arrangements and sustainability.

This project began in mid-1999 and builds on the achievements of a pilot phase initiative (1994-1998) that responded to concerns regarding impacts to the coral reefs and other coastal habitats by inappropriate coastal development involving dredging and land reclamation, and the run-off of sediment, agricultural chemicals and sewage. Further, several of the marine protected areas had inadequate on-the-ground management, and generally there was the need for more community involvement in coastal resources management. The need was also recognized to continue the public awareness campaign to increase the understanding of coastal zone management, targeting specific audiences. Moreover, a financing mechanism that would ensure the sustainability of the programme was lacking.

The adoption of the CZM Act in 1998 was a primary output of the pilot GEF project which led to the legal establishment of the CZM Authority and Institute. This created the Statutory Instrument that for the first time provided Belize with a formal institutional structure for conserving coastal biodiversity and managing coastal issues through a multi-institutional Board of Directors, an Advisory Council and a CZM Institute.

This project therefore aimed to support the Government of Belize in addressing these needs and consolidating the integrated coastal zone management programme by undertaking targeted interventions for biodiversity protection in a sustainable manner.

These measures include:

- strengthening the planning, management and operation of a network of 7 marine protected areas (5 of which are World Heritage Sites);
- integrating development planning on the cayes with marine biodiversity conservation principles;
- developing a sustainable financing mechanism;
- establishing legal and institutional capacities for facilitating bioprospecting; and
- complementing widespread environmental conservation advocacy with coastal and marine biodiversity concerns.

The goal of the project is to secure the conservation of options and existence values embodied in the Belize Barrier Reef Complex. The project purpose is to provide decision-makers and relevant stakeholders with analytical, management and technical capacities, decision making and planning tools, and financial mechanisms and economic instruments for long-term conservation of coastal and marine biodiversity.

The project was executed through the Ministry of Fisheries (now, Ministry of Agriculture and Fisheries). The implementing agency is the Coastal Zone Management Authority and Institute (CZMAI), with its Board of Directors acting as the Project Steering Committee. There are 6 project objectives:

7. Consolidate capacity to effectively integrate biodiversity conservation concerns into a Coastal Zone Policy Framework;
8. The Belize Barrier Reef Marine Protected Area Network is established and fully functional;
9. Caye development plans are integrated with marine biodiversity conservation concerns through a demonstration project;
10. A sustainable financing mechanism for marine biodiversity conservation is established and operational;
11. Legal and regulatory capacities for facilitating bioprospecting agreements are in place; and
12. Training, awareness-raising and information dissemination activities garner public support for biodiversity conservation through coastal zone management and the barrier reef protected area network.

At the time of this evaluation, four months after the project ended, a depressing situation was evident at the headquarters of the CZMAI in Belize City. Most of the offices were empty, computers and office equipment sat idle, there was almost no program continuity, boats and vehicles remained parked, many in need of repair, and there were almost no financial resources available. The most troubling situation was the lack of corporate leadership, a chronic problem at the Board of Directors level for some time.

Whatever satisfactory outcomes had been achieved by the UNDP/GEF project during its five-year duration, and these were numerous, it was obvious that the National Institution itself was failing. Many project successes were evident in the files and documents, in the operations of new MPAs, and in the memories of key highly qualified staff now well

employed at other institutions throughout Belize. It is interesting to note that the suspension of most project activities and the loss of the Institute's staff have inadvertently enhanced the capacity for ICZM within the government and private sector in Belize, by re-integrating these skilled individuals into coastal and marine conservation and protection activities. However, even as many project activities can be checked off as successfully accomplished, CZMAI, the national institution, is at present time floundering as a result of poor management and lack of vision and commitment for the future. And, not even at this time of greatest crisis, despite the individual good intentions and high level of expertise of the members of the Board, has the Chair of the Board of Directors of the CZMAI, found it necessary to hold a meeting to develop an emergency strategy.

3. THE PROJECT AND ITS DEVELOPMENT CONTEXT

Situated in the Wider Caribbean Region, Belize's coastal zone supports a wide diversity of ecosystems and organisms, many of which are gradually being degraded by developmental pressures. The coastal zone is central to economic and socio-cultural development. Over 50% of Belize's national territory is under the sea, and the variety of reef formations occurring here are unparalleled elsewhere in the Caribbean.

Belize is well known for the largest Barrier Reef Complex in the Western Hemisphere and the second largest in the world. The reef stretches approximately 220 kilometres along the country's eastern coast and is characterized by three offshore coral atolls, over 1,060 sand and mangrove cayes, sea-grass beds, extensive mangroves, littoral forest, estuaries and wetlands. Not only do these coastal resources provide critical habitat for species of economic importance and essential ecological services, but also provide nesting and foraging sites for many endangered species and several threatened bird species. A relatively good record in terms of environmental management, coupled with the lowest population density in the region, has ensured that Belize has been able to conserve its environmental resources to a far greater extent than other countries in the Central American region. Yet Belize's coastal zone is under increasing pressures from anthropogenic activities that originate in different economic sectors such as agriculture, fishing, agro-industry and increasingly of late, tourism.

The total population of Belize is approximately 230,000 persons (1997). Although the country has received several thousand refugees from Central America, the population density figure is still the lowest in the region (the country's population density doubled between 1970 and 1998, moving from 5.2 persons per square kilometre to 10.4. Over half of Belize's residents (52%) live in rural areas). Clearly, severe demographic pressures that have caused exploitation and over-use of the environment in many other parts of the world are relatively muted in the Belizean context. However, population aggregation in the coastal zone suggests mounting pressures. The economy performed well, and grew at an average rate of 2.7% since 1993. Much of this growth has been driven by rapid expansion of agriculture, fisheries and tourism, all of which rely heavily on natural resources. More recently, the economy has suffered a serious setback.

The country's population is comprised of a number of ethnic groups, including Creole, Garifuna, Mopan Maya, Q'eqchi' Maya, East Indian and individuals of European, Middle Eastern and Asian descent. According to Belize's 2000 census, the country's population is young: 41% of the population is less than 15 years of age..

Belize's main economic activities are agricultural cultivation and related processing; harvesting of forestry products; harvesting and production of marine products; and tourism. The country's primary exports are agricultural products, and the main export markets are the U.S. and the European Union. The economy expanded during the period 1997 – 2002 and the country's GDP growth rate averaged 7%. The 2000 census found that 50% of the country's working-age population was employed, although there was a gender disparity: 70% of working-age males were working, compared to only 30% of working-age females. With a relatively open economy, Belize is dependent on external markets and resources for growth, and thus fluctuations in the world economy represent a significant source of volatility. Poverty rates vary widely in Belize: the 2002 Poverty Assessment Report found that 79% of the population were poor and 56.1% were indigent in the southernmost district of Toledo, while the poor population in the

other districts ranged from 24.8% - 34.8% and the indigent population ranged from 4.8% - 7.1%.

Belize has demonstrated strong legal commitment to the conservation of coastal and marine biodiversity at both the international and national levels. It ratified the MARPOL in 1995, the Convention on Biological Diversity in December 1993, the World Heritage Convention in 1990, and CITES in 1976, amongst others. At the national level there is a wide range of legislation that has a bearing on coastal and marine resources. The most important of these are: the Forest Act, Forests (Protection of Mangroves) Regulations, the National Parks Act, the Environmental Protection Act, the Protected Areas Conservation Trust Act, Wildlife Protection Act and the Fisheries Act. Of prime significance to this project is the Coastal Zone Management Act that took effect on May 8, 1998. This Act mandates the creation of the Coastal Zone Management Authority and a supporting Technical Institute to coordinate all the different sectors active in the coastal zone.

This project occurred within a broader framework of previous and current UNDP and GEF assistance to Belize. These include the National Biodiversity Strategy and Action Plan (BZE/97/G31), the Mesoamerican Biological Corridors Project (Bladen and Chiquibul areas), Climate Change Enabling Activity (BZE/98/G31), the GEF Small Grants Project (BZE/95/G52), the PACT Community Co-managed Parks System (BZE/98/G32), and the Sustainable Human Development Project (BZE/96/001). All these projects seek to protect natural resources through research, policy formulation, active management of some designated areas, and, in the case of the Sustainable Human Development Project, through building up leadership capacity in rural areas. The project built on preceding UNDP and GEF programs in Belize and added value in terms of operationalizing a network of seven marine protected areas and providing a successful model for Integrated Coastal Zone Management (ICZM), a model that can be adapted to the individual country contexts and replicated within the Mesoamerican Barrier Reef Initiative.

4. FINDINGS AND CONCLUSIONS

Integrated Coastal Zone Management in Belize, and in turn the conservation and sustainable use of the Barrier Reef Complex, is at a crossroad. Major advances have been made since an initial exploratory workshop on ICZM in San Pedro in 1989 and the initiation of the original GEF-sponsored project in 1993. Yet at the conclusion of two phases of GEF/UNDP donor support over the past ten years, serious questions remain as to the capacity and commitment of the Government of Belize to assume the responsibility for the long-term challenges and opportunities inherent in the coastal resources of Belize and to truly support an integrated coastal zone management program into the future.

The main challenge is to improve the institutional arrangements and their performance and to finalize mechanisms for financial sustainability that will facilitate the transition from 'project' to a more permanent and operational ICZM 'program' that has a clear mission, vision, role, mandate and adequate resources to effectively conserve and use the natural resources of coastal Belize and its barrier reef system.

Belize has completed most of the essential actions outlined in the now well-accepted ICZM project cycle. Issues identification and assessment (Stage 1) was completed in the early phases in a highly consultative way; program preparation (Stage 2) was facilitated through the GEF-supported projects in close collaboration with relevant government ministries and stakeholders; formal adoption and funding of the program (Stage 3) have also been supported through these UNDP/GEF-supported projects and the commitment by the Government of Belize through the passage of the CZM Act and establishment of the CZM Authority and Institute; implementation (Stage 4) has realized significant results, particularly in policy implementation and monitoring, education, capacity building, outreach and marine protected area management; and monitoring and evaluation (Stage 5) has been regular and ongoing, further supported by this evaluation.

Preceding evaluations and interim assessments of this project concluded an overall satisfactory performance rating with recommendations for prioritizing with urgency, key areas in the then remaining time. The findings of this final evaluation team concur that many outcomes achieved while the project was operational are to be applauded, but we note several important areas of deficiency in the overall achievement of the project objectives and intended outputs.

For the outputs that have not been fully realized, much of the groundwork for their full implementation has been laid. However, as the project concluded, a sustainable path forward - to take these efforts from an externally-supported project to a business-oriented national program - has not been completed and most of the staff of the CZM Authority and Institute has left. Many of the essential coordination and financing arrangements for long-term sustainability of the project's objectives remain on hold and the important work of the Institute – data management, education, provision of advice on proposed developments, etc. – is not taking place. This is seriously diminishing the quality and timeliness of key decisions that affect critical coastal and marine resources and biodiversity in Belize.

CZM Act / Strategy:

The Government of Belize has a comprehensive mandate, over 20 public sector departments with mandates to carry out the various sectoral-type functions in ICZM, and more than 30 Acts for effective policy and regulatory management of the coastal zone. Yet as in most countries, an integrated approach to the management of human use of the coastal zone and its natural resources requires a more comprehensive and coordinated approach than traditional structures provide. Issues of overlap and discrepancies in jurisdictional and administrative powers constrain the effective and efficient management of the coastal zone and require rationalization. It is the role of ICZM to provide the necessary inter-agency coordination to balance stakeholder interests and to ensure that Belize has a sustainable resource upon which to maintain its economy, environment and quality of life. This and previous evaluations of the project confirm broad agreement on the importance of and need for a permanent ICZM program in Belize.

The Government of Belize is to be congratulated for its foresight and commitment in the passing of the Coastal Zone Management Act (1998, revised 2000) and the creation of the Coastal Zone Management Authority and Institute (CZMAI). This early commitment to provide the legislative and institutional framework for ICZM is commendable and sent a clear signal to government ministries and other stakeholders about the importance of the coastal zone and the Government's commitment to managing it in an integrated manner. This is particularly important in a decentralized or networking type of ICZM program, where existing sectoral authorities remain in place and all ministries and departments work in a collaborative way toward common goals for the coastal zone. Networking has proven to be the favoured approach by most countries and jurisdictions and usually has distinct advantages if effectively implemented.

The adoption of the CZM Act has given the CZMAI important statutory standing within the Government structure and the authorization and mandate to develop a comprehensive coastal zone management plan. The first step was the production of a National ICZM Strategy that was developed through a broad consultative effort and endorsed by the Government in 2003. This evaluation team concurs with the conclusions of the mid-term evaluation that the Strategy is a comprehensive, understandable and practical product and that the planning process to produce the Strategy was laudable. The CZMAI has used the Strategy as a guide for implementing its activities and in developing its strategic plan for the future. Of positive note, other government and NGO partners often refer to the Strategy in developing programs and initiatives for coastal and marine resource management. The project has collaborated with other agencies in influencing the creation of additional policies and laws, such as the Fish Spawning Aggregation regulations, the draft Aquaculture policy and the Land Use Plan.

Further positive developments include the preparation of the draft Cayes Development Policy (2003), draft Coastal Development Guidelines (2003/04) and the adoption of the standard MPA entrance fee. These policies and the Coastal Development Guidelines are the result of numerous consultations with relevant stakeholders, analysis of the baseline information and building of Government consensus to support and implement these policies and ultimately the Plan. An amendment to the CZM Act or other appropriate Cabinet action that affirms the community development guidelines and

provides some degree of authority would add further incentive for action by committees, some members of which voiced frustration with 'not being listened to'.

The next stage of ICZM development, the comprehensive CZM Plan, will involve the examination of all relevant laws and regulations to identify gaps, duplications and inefficiencies that should be addressed. Within this review, the land-ward boundary of the coastal zone, as identified in the Act (mean high-water), should be re-considered. It does not reflect or provide for the broader geographic scope that an ICZM approach requires, especially with regard to watershed-based impacts that have been demonstrated in Belize to have an impact on coastal waters and resources. Inland and sea-ward boundaries in most modern ICZM programs are now more ecosystem-based to recognize land-based impacts and high-seas activities. In fact, given that the inland boundary of the coastal zone in Belize stops at the high-water mark, this program cannot technically be called an integrated coastal 'zone' management program, as this definition requires some inclusion of land. In practice though, the CZMI Advisory Council does review land-based projects and has provided useful advice to these activities beyond the scope of the formal land-ward boundary of the coastal zone.

CZMAI Structure and Functioning:

The Coastal Zone Management Authority (CZMA), with its technical arm, the CZM Institute (CZMAI), was enacted to coordinate the ICZM process for Belize. The Authority and Institute are supported by a senior-level Board of Directors and a multi-stakeholder Advisory Council, both of which are critical coordinating mechanisms for the project and the ICZM program. The Authority was fully financed throughout the project by the Government of Belize and had one staff person, a CEO. The CZM Act appropriately focuses the Authority's functions on coordination, planning and policy development, advising, collaborating and monitoring. It does not assign any permitting, management or regulatory authority to the CZMAI.

The CZM Institute was a multi-disciplinary technical institution that assembled, trained and built the capacity of its professional staff (more than 26 technical experts) to form a competent, committed and respected resource that was viewed by colleagues and the public as a valuable, non-partisan resource dedicated to the sustainable management of coastal resources. Through significant ongoing investments in the technical capacity of the Institute's staff throughout the project, there were in place highly trained personnel in specific areas of expertise relevant to needs in the Belize coastal zone; unfortunately, most of the staff is now elsewhere. There was also a publicly-perceived disparity in salaries and benefits paid to project staff in relation to equivalent positions within government, with some people expressing the view that the Institute is a 'Rolls Royce' model that was too richly endowed; this created tensions within some Ministries that lost staff to CZMAI. Nevertheless, the establishment of baseline data and monitoring programs, in particular coral reefs, endangered and indicator species (e.g., manatees) and coastal water quality, ensured that these programs provided data on the long-term status and threats to the Belize coastal zone. The establishment of the Institute has had a national impact and has also been recognized regionally and internationally.

The Coastal Zone Management Advisory Council was created to advise the Authority and Institute on technical matters; formulate draft policies, plans and programs relating to ICZM when requested; facilitate and encourage the sharing of information among government agencies, NGOs and educational institutions; comment on EIAs for coastal

developments and review the ICZM Plan. The Advisory Council is comprised of members with technical expertise as per the requirements of the Act, selected by the department or stakeholder group they represent and appointed by the Authority. It also includes senior representatives of government ministries, the Belize Tourism Board, NGOs, private sector, and the university. The Advisory Council has played a significant role in the multi-disciplinary review of project developments in the coastal zone and in coordination between agencies.

Unfortunately, this significant capacity to guide the delivery of ICZM in Belize (Authority, Institute, Advisory Council) was all but lost at the close of the project when UNDP/GEF resources were expended, most of the staff left as of April 30, 2004 and the CEO of the Authority and the Director of the Institute resigned their positions. Only a skeleton staff remains in place at this time, largely in a care-taking mode. The core staff retained with the Institute was given a new one-year contract; this was seen as a sign of good faith from the Ministry of Fisheries to the staff of the Institute. An acting Director of the Institute has been attempting to keep the institution functioning since mid-2004, albeit at a minimal level. Further, the re-organization of government Ministries and concomitant roles and responsibilities, and the scramble for sustainable financing, particularly in the latter months of the project, has made it challenging for the key parties to maintain a focus on long-term goals.

There is a dichotomy of opinion as to whether the core problem with the current CZMAI is one of management or structure.

The Board of Directors (BoD) of the CZM Authority is the central body for coordination of ICZM in Belize. The inherent strengths of the BoD are its statutory mandate, high-level representation, relatively broad representation, its strong technical and administrative support from the Authority and Institute, and its standing to take decisions related to the program or directly to Cabinet. However, an institutional rationalization study conducted in 2004, a Board Strategic Planning session and this evaluation, revealed a consistent view that the Board of Directors of the CZMA is not functioning as it should.

In practice, the program has suffered from a lack of leadership, commitment and due diligence from the Board. Board meetings have not been regular or well attended, with quorum often not being achieved. This has constrained timely and well-informed decision making on key issues of importance to the program. Many of the senior representatives from line ministries struggle with the inherent conflicts of interest in being a sectorally-oriented regulatory agency and guiding a broad-looking inter-disciplinary body at the same time. Issues of ministerial jealousy and turf protection were cited often. Discussions around controversial issues were often deferred, advice from the Advisory Council was seldom if ever received by the BoD, and some Board members acknowledged that they did not have the appropriate level of understanding of ICZM processes and issues. There is a lack of performance accountability for individual Directors and no built-in compliance procedures to implement and/or enforce decisions. The Chair of the Board did not rotate as specified in the Act. There is also some confusion with respect to the role of the Authority and Institute in relation to the legal responsibilities of Ministries. Cabinet directed a review of the BoD structure in May 2004 with the intent to strengthen the composition of the Board. However, the BoD did not achieve a quorum of government representatives at the meeting organized to conduct this review and the issue remains unresolved.

It is widely recognized that the CZMAI's mandate and scope is more comprehensive than any single-sector department and that its standing as a multi-disciplinary technical institute affords it the independence – but not necessarily the influence – that such a program requires. While many departments and ministries have looked to the CZMAI for technical advice, information and objective review of developments under their authority, its ability to exert influence on departmental decision-making is limited. The ability for CZMAI to be effective is therefore dependent on other Ministries' endorsement of its work, which is not always easy to achieve.

Many coastal management objectives can be achieved through the Environmental Impact Assessment (EIA) process. Many projects have benefited from the multi-disciplinary comments, solid scientific and technical information and legal advice, provided by coastal experts at the CZMAI. The Institute has been acknowledged by its government colleagues for its role in this regard and, if and when it is re-staffed, enhancing this component of the office and its role by securing voting status within the National Environmental Appraisal Committee (NEAC), which conducts the country's EIA process, should be pursued. A detailed case study of controversial projects that have gone through or avoided the EIA process would be instructive and help guide any reforms and improvements to the process.

Given the growing scope of alliances and partnerships, the membership of the BoD and Advisory Council might be re-examined; perhaps providing ex-officio status to other members until a package of amendments to the CZM Act can be brought forward. Also to reflect the intended balance of interests on the Board and Advisory Council, the Chairs' position should be rotated every 6 months or one year. This would lighten the load on any one individual or office and encourage more active participation by the other members.

The long-term effectiveness of an ICZM program is usually enhanced by the institutional placement of the core coordinating office at the highest appropriate level of government, while maintaining vital connections with and accessibility for local stakeholders and citizens. Proposals to amalgamate the CZM Authority with the Fisheries department were explored but deferred. Interviews conducted during this final evaluation revealed a desire by many to re-assign the institutional home of the CZMAI from the Fisheries Department to another Ministry with a less sectorally-limited mandate and the ability to prioritize ICZM within Cabinet. Many perceive the Ministry of National Development to be the appropriate institutional home for the CZMAI, but its remit is largely international economic cooperation and it does not have the institutional capacity or portfolio mandate to accommodate it. The Ministry of Natural Resources was also suggested, but it is unclear whether it has the will or capacity to assume this function. Other discussions resulted in a recommendation to have the Authority report directly to Parliament. Since the CZMI, by virtue of its functions cuts across several sectors, a direct reporting relationship with Parliament would be desirable. However, such a move would require reform of the political system and would set a precedent for an Authority.

The 2004 Rationalization study recommended, many stakeholders believe, and the BoD observed that there are strong recommendations to separate the Institute and Authority. It is recommended that the Authority should remain a semi-autonomous policy and coordinating body funded by Government, and that the Institute should be a legally independent, public-private body autonomous from Government. Three NGOs (WWF, WRS, PACT) have expressed their preference for such a separation, indicating that this

would improve the Institute's overall success in fundraising. Regardless of its future status, the Institute should remain closely aligned with the CZM Authority, as this is its source of expertise and advice.

Discussions have been underway to re-align the CZM Institute and its research capacity with the University of Belize (UB). Indeed, at the outset of the CZMAI's existence, the university was earmarked as the most logical place or 'natural home' for the CZMI to reside. The University of Belize and the CZMI have the shared potential to become a regional Center of Excellence in ICZM. The two institutions are currently negotiating a General Agreement for Institutional Cooperation to jointly develop coastal and marine education programs, training and research for Belize. The University of Belize offers a 2-year Associate degree program in marine studies and maintains a research station on Calabash Caye, with 3-5 on-site staff conducting research and education (mangroves, seagrass) and hosting short-term field courses. The University's marine program continues to show an increase in enrolment. Students are interested in coastal and marine positions and are often employed by government and NGOs.

The Institute could be established as an associate or affiliate of the UB, while retaining its independence and full responsibility for its administration and finances. As an associate of UB, CZMAI would provide research and educational support to UB while fulfilling its national mandate for scientific monitoring, research and training for coastal and marine resources. While the concept of close association with UB is positive and supported by discussions with stakeholders, the issue of independence and the need for seamless collaboration between the Institute and Authority needs to be resolved. The Institute, in its new form, should have its own BoD even if it is affiliated with the UB; ideally, the Institute's BoD and the UB BoD should then report to a Board of Trustees. It must be investigated whether this arrangement could be legally realized through the provisions of the UB Act. This arrangement would require legislative changes to the CZM Act and creation of a legal instrument for the new Institute. An interim BoD for the Institute could be set up to guide the process of discussions leading to the legally independent status of the Institute.

4.1 Project Formulation

- Conceptualization/Design

SATISFACTORY

The project was well conceived, except in underestimating the degree of resources and effort required to develop sustainable finance and the lack of flexibility in the logical framework to allow re-focusing beyond a single financing option. It has achieved many of its design objectives, but has not sustained them. With invaluable support of the Government of Belize, UNDP/GEF and the EU, the CZM Authority and Institute has successfully developed a National CZM Strategy; built (although not maintained) valuable technical capacity; developed widely supported and broadly distributed development guidelines; established programs for native endangered species, and water quality and coral reef monitoring programs; established participatory processes for decision making on coastal resource use; provided numerous opportunities for stakeholder participation in the planning and management of those resources; built a national database; and increased national awareness and appreciation of a wide range of coastal resources issues. State-of-the-Coast reports indicate that reefs are recovering from hurricanes and are generally healthy. Water quality in the coastal zone

continues to maintain good quality and flagship manatee populations remain healthy and reproductive capacity is good.

There are a number of factors, however, some unpredictable, others that could have been anticipated, recognized and addressed earlier in the project, that threaten the long-term sustainability of the good work that has been conducted. These factors range from exigent macro-economic conditions, institutional malaise, a 'project-vs.-program' perspective, an insufficient appreciation within government of the objectives and benefits of ICZM, and the inability to implement sustainable financing despite this being a pre-condition in the Act and in justifying UNDP/GEF funding.

- Country-ownership/Drivenness

National political commitment for ICZM was demonstrated early in this process through the approval of the CZM Act, the establishment of the CZM Authority and Institute (all in 1998), the adoption of the National ICZM Strategy in 2003, and by funding the policy/coordination functions of CZMA. Some ministries have included CZMA on their advisory bodies (e.g., NEAC, Land-utilization Authority) to provide technical advice. However, the worsening economic conditions facing Belize have clearly constrained the Government's ability to focus on and continue to support the essential priority of this program at levels necessary to achieve project outcomes over the long-term. While acknowledging the challenges faced by government in light of so many competing priorities, the GoB has not transmitted clear signals concerning the shape this support and program will take.

- Replication

The Sibun watershed education project is an excellent example of community-based stakeholder participation as well as the effective merging of technical assistance and public education components of the CZMAI. It could be replicated in other communities.

The 'SHARK' (SHARing Reef Knowledge) Network developed and supported by UNDP-GEF for coral reef projects it supports has the potential to be a valuable forum for projects to learn from each other. This will minimize 're-inventing of wheels' and disseminate best practice and conditions for success. See: <http://roo.undp.org/gef/shark/index.cfm#>

4.2. Project Implementation

SATISFACTORY

- (i) Implementation

The logical framework has been used as the basic structure for the project in terms of planning, implementation and evaluation. During implementation it became clear that the project objectives and implementation strategy were both relevant and pertinent to the threats and opportunities identified, with two significant exceptions: sustainable finance, and the designation of the BoD as the Project Steering Committee. The degree of effort required to achieve sustainable finance was severely underestimated and constrained to a degree by the logical framework itself. Rather than focusing on developing the institutional capacity of the CZMAI for sustainable finance, the project sought to identify a single funding mechanism. This led to considerable study and

discussion of potential funding sources, but no effective implementation of any of them. Without full-time specialized staff, adequate institutional and administrative mechanisms, and political support, sustainable finance remained a theoretical concern rather than actionable program. The choice of the BoD, the composition of which was spelled out in the CZM Act, as the Project Steering Committee was also an error in project design that was not corrected during project implementation. The BoD did not function as designed because the Chair did not rotate, eliminating the possibility of creating ownership among the Board Members. The requirement for a quorum of Government CEOs meant it was extremely difficult to get a quorum for a meeting, and as a result, urgent issues went unresolved.

Many, but not all of the objectives and outcomes of this project have been met but not necessarily sustained. The annual, tripartite and mid-term evaluations served to identify project strengths and weaknesses, and some corrections in activities and budgets, although not all have been made, in particular, the lack of action to give adequate attention to sustainable financing. The project built capacities and enhanced prospects for sustainability but these have dissipated and prospects for sustainability are uncertain.

Monitoring and evaluation

SATISFACTORY

The development and maintenance of a truly useful and comprehensive monitoring program for the Belize coastal zone and Barrier Reef would represent a huge cost for any one agency or program. The project has taken several steps to build the capacity for baseline and ongoing monitoring, research and data management. These are essential elements for informed management decisions. Many Belizean agencies looked to the Institute for technical and scientific information and analysis.

The MBRS project too, targets the need for a monitoring system and is well positioned to develop a region-wide monitoring program that adopts common protocols, quality controls, and agreements on the set of parameters to be monitored. There are a number of regional monitoring efforts and agencies which the MBRS project has recently convened to establish harmonized protocols and agreements on sampling sites and technique, and core and issues-specific parameters.

CZMAI is one of only two GIS-equipped offices within Government and the data centre had great capacity for assisting partners with planning, assessment and educational activities. It was also a potentially strong revenue generator. The CZMAI, once reconstituted, should continue to develop its excellent data management and GIS systems and also evaluate and conduct a market feasibility study / needs assessment to determine the potential of an enhanced GIS capacity as a revenue-generating component of the program.

The positive partnership with the Institute of Marine Studies (IMS) at the University of Belize should also be encouraged to enhance its applied research component especially as the academic faculty and degree program are moved into the IMS.

Development Guidelines:

The development of an ICZM framework and coastal development guidelines for Belize's coastal zone is a significant achievement which has broad national impact as a national plan guiding the use and development of coastal resources. Draft development

guidelines for all eight planning regions have been prepared and validated by the stakeholders in each region via the CACs. These, together with the Cayes Development Policy, form the basis for the CZM Plan.

Practical guidelines have also been developed for Tourism Best Practices, marine dredging, community development guidelines and policy development for current and future coastal resource challenges. In addition, the Cayes Development policy outlines guidelines for shoreline development, waste disposal and water use for the cayes. Compliance plans for EIAs are issued for developments on the cayes, which incorporate recommendations from the development guidelines for each coastal region and the Cayes Development Policy. It is expected that with the adoption of the CZM Plan, the development guidelines and the Cayes Development Policy will be strictly adhered to for coastal developments. It was also suggested that the Caye Caulker CAC could become the Housing and Planning Authority (i.e., enforcement agency) on the Caye, but this is awaiting a decision from the CZMAI Board.

The Caye development plans continue to be consulted by the various decision-making agencies and institutions. Their use has been made mandatory by the Department of Environment when considering development along the coast and on the cayes. This mainstreaming of the plans into coastal planning is a positive sign of continuity and sustainability of the initiative started under this project.

Bioprospecting:

Minimal impacts have been produced under this objective as the legislative framework and institutional arrangements are currently being finalized. The draft legal framework for bioprospecting was prepared and shared with key stakeholders thereby generating some public awareness. The consultants recommended a holistic approach looking at bioprospecting and biodiversity. Stakeholders felt that while the holistic approach is crucial, there needs to be clearer and more comprehensive legal structures for the institutional framework for bioprospecting and sample contracts/agreements to utilize in the interim. The final report and recommendations have been received and will be shared with the CZMA Board. Recommendations for the establishment of a Trust Fund for Bioprospecting to provide benefits to communities through grants and capacity building, and promoting conservation of marine biodiversity are still on hold. At the public consultation held, the Fisheries Department representative indicated that Fisheries could not support the proposed legislation as bioprospecting should be under that department. Still, the drafts were presented to CZMAI and are awaiting the ruling of the inactive BoD.

Stakeholder Participation

HIGHLY SATISFACTORY

The CZMAI mission statement emphasizes the importance of 'building alliances' in pursuit of its goals. This is a critical goal, especially with a networking type of coastal management program. During this phase of the project, CZMAI has been successful in building many such relationships. The valuable initiatives undertaken entailed: meeting with all coastal communities, liaising with relevant departments, negotiating with all stakeholders and investors in the coastal zone, establishing research points for water quality monitoring, coral reef growth, species research (especially manatee protection), coastal planning, data management, education and awareness.

The existing institutional framework allows for adequate participation of stakeholders in the coastal zone policy process. The advisory process is a 'bottom up' structure with local and national stakeholders/advisory groups providing critical inputs at the field level; the CZMAI Secretariat coordinating the process; CZMA Advisory Council providing technical advice for the Board and Cabinet; the CZMA BoD exercising leadership and policy direction for the Authority and Government; and the Cabinet serving as the final authority for government decisions

The Belizean civil society sector, comprising mostly NGOs, has significant and meaningful involvement in interventions to improve the quality and sustainability of the environment and its natural assets. The national ICZM strategy lists some 41 NGOs (e.g., Belize Tourism Industry Association, Belize Audubon) and quasi-governmental organizations (e.g., PACT) involved in all functional areas of CZM (e.g., tourism product enhancement, public education, co-management, advocacy, financing, research, training, conservation and preservation). Several producer associations, such as the Fisheries' Cooperatives and Hotel Industry Association, have been supporting activities relating to CZM, especially in advocacy. The strengths and diversity of the NGO community in Belize, and moreover the supporting role which NGOs such as the Belize Audubon Society have played in furthering environmental issues in general and CZM issues in particular, is noteworthy. The contribution of non-governmental organizations and individuals to this project over the past five years, e.g., participation on committees, working and Advisory groups, is close to BZ\$350,000 (see Annex 6).

Community participation through Community Advisory Committees (CACs) in decision making governing the use of coastal and marine resources has had broad impact. Until the CAC process was initiated, there had been little comprehensive land-use or community planning in Belize and the general public was not often provided meaningful opportunities for input. While the extensive system of committees initially provided necessary stakeholder participation, in some cases it has overburdened volunteers and agency staff alike, reducing productivity and effectiveness. Caye Caulker was selected as a pilot or demonstration project for the component of the GEF project that is to produce development guidelines through involving community participation via CACs.

Today, there are CACs in place for each of the eight planning regions, which cover the entire Belize coastal zone. The key stakeholders who comprise the members of the CACs in each region have received basic training in conflict resolution, consensus building, leadership skills, and mechanisms for conducting effective meetings, thereby empowering the CACs to fully participate in the development of the guidelines and monitoring their implementation.

The CACs provide the structure for sustained community participation in coastal resource management and decision making through their empowerment and ownership. The three original CACs have continued to meet quarterly to finalize the guidelines for each region. The remaining 5 CACs have had inaugural and 2 validation meetings to finalize the draft development guidelines for each of their regions. The new strategy of simultaneous and facilitated development of the guidelines, while time intensive, has proven to be quite efficient in achieving the goal of completion of all remaining 5 development guidelines over a period of a year. The development guidelines for Caye Caulker have been completed and are integrated with the management plan for the Caye Caulker Forest and Marine Reserve, to take into consideration the importance of

conserving the coastal resources in the nearby MPA. The Caye Caulker Village Council frequently refers to the development plan in reviewing lot applications.

The CAC process has paid dividends as basic as providing a forum for citizens to examine and discuss issues affecting their community and reports back to the various ministries containing data about current projects under consideration. At the national level, the CAC outputs should be valuable to the National Land-Use Management project to be undertaken by the Lands Department within the Ministry of Natural Resources. In general, the CACs and other committee structures within the project could benefit from a re-visiting of membership, more on-site staff support, and a refresher course of rules and procedures for committee operations.

Stakeholder interest and ownership of community planning concepts and the role of MPAs also affected the rate and level of achievement of results related to these issues. The fact that the legal and management responsibilities for MPAs rests with the Fisheries and Forestry Departments, also was a major factor that affected the achievement of the results associated with the MPA Network, particularly in setting up voluntary warden programs, patrol plans, MPA Advisory Committees, and reporting on MPA management progress and effectiveness.

Awareness/Support:

The public information and education component of this project has been productive and widely acclaimed by target groups such as fishers, local communities and tourism stakeholders and cited as one of the most important techniques to bring about long-term environmental awareness and action. The general level of knowledge and experience related to biodiversity conservation in the ICZM context has increased dramatically within the project area at all levels. Through this medium, user groups are better prepared to make informed decisions on the use of coastal resources to ensure the sustainability of their livelihoods.

The project has cultivated a general public awareness and support for biodiversity conservation. The education and public awareness program under the project has achieved national impact, particularly with flagship species like the manatee (this success also inadvertently created for some people a limited image of CZMAI as simply a conservation-oriented NGO). There has been a significant increase in awareness of coastal resource issues and marine conservation through the targeted education and public awareness activities implemented. In addition, the project has developed the capacity of several key stakeholder groups such as fishers and tour guides/operators through programs on tour guide training. State-of-the-Coast reports, the Coastline newsletter, technical reports, special surveys, booklets, press kits and brochures were published and widely distributed. The project has been largely successful in developing awareness and a culture for coastal and marine resource management and conservation amongst particularly youth, government agencies, local communities, developers, key interest groups such as tourist operators and fishers, and the public at large. The only notable deficiency in the program was the lack of a clear identification of baseline attitudes and concerns by stakeholder groups, and the measurement of changes in these parameters during the life of the project.

The CZAMI continued to boost public awareness of the mandate and function of the CZMAI among the general public and other sectors of government through updating of

its web page, airing of TV spots, numerous press releases, lectures, special displays, workshops, training and consultations on resource management, financing MPAs and ICZM. Press releases and responses to media inquiries were routinely handled.

Technical brochures like Best Management Practices are well received and used. Monitoring and data management systems have been established and have begun to create an essential scientific baseline on the state of the coast. The process of creating the ICZM Strategy paid important dividends such as increasing public awareness and education. Some stakeholders have already embraced the recommended actions contained in the policy where Cabinet approval is not needed.

The CZM Institute was the 'go-to' agency for coastal- and marine-related issues. The Institute was regularly consulted on all coastal development applications for dredging, pier construction, subdivisions, EIAs and coastal infringement reports. The data provided on the state of coastal and marine resources and recommendations produced by the Institute on various issues were generally incorporated into decision making by the relevant government agencies. The technical advice of the Institute staff was considered of high value as they were often the only specialized coastal expertise. It is a great loss that most of these technicians have now left the Institute.

The GIS and Data Center continued to build its database through the completion of the development guidelines and the associated maps for each planning region. Students, universities, government agencies, and others regularly accessed this data. The Center had partnered with WWF to generate maps of the MPAs and critical species.

The two major sectors that have seen improvement in practices have been the fishing and tourism industries. As a result of education and public awareness programs, and closer coordination with stakeholders, both industries have focused on creating sound industries through sustainable practices and use of coastal resources. The private sector's support for ICZM and endorsement for the work of the CZMI increased significantly through public awareness initiatives. Recent surveys have indicated that the majority of tour operators and tourism operations are knowledgeable of the CZMAI and its role and contribution to coastal resource management. When the Institute was functioning, these tourism stakeholders expressed the view that CZMAI should expand its programs and continue the agency's important work. CZMAI increased awareness of conservation issues, particularly through training (e.g., tour guiding), workshops, and consultations in key issues such as financing MPAs and ICZM.

In year three, an attempt was made to target certain groups with the outreach efforts. The Open Day was acknowledged as very productive by citizens, stakeholders and government agency colleagues as well, who commented about learning just what and how much the CZMAI does.

One of the key deficiencies has been the lack of focus of awareness programs on government officials. This is a priority area for addressing post-project within the long-term implementation of ICZM. Deficiencies noted by the target groups include insufficient promotion of CZMAI and its role in managing Belize's coastal zone. The CZMAI, when its capacity is restored, should consider re-directing its general public awareness efforts more toward a public and community relations approach with a Strategic Plan and Distribution Strategy that in some ways tactically resembles a political marketing campaign. Other strategic mechanisms might include activities ranging from

annual State-of-the-Coast briefings to the Prime Minister and Cabinet to concise fact sheets about issues that confront specific communities or groups. An updated and interactive website and more radio appearances and announcements should be considered.

Special emphasis should be given to face-to-face, in-person contact with the public in general and particularly with certain stakeholder groups. The Public Relations person should act more like a spokesperson, being ready and willing to appear anywhere a critical constituency gathers. A Speakers Bureau, composed of CZMAI staff who would be prepared to give presentations on their area of expertise in schools and any other event would be valuable.

All of the above recommended actions depend, of course, on solving the financial issues, re-building the institution and re-hiring of qualified staff.

MPAs:

Belize has proclaimed a total of 14 marine protected areas (MPAs). Under legislation, 8 Marine Reserves are the responsibility of the Fisheries Department and 6 Protected Areas of differing categories are the responsibility of the Department of Forestry. Some sites within the network have dual designation, which offers opportunities for collaboration between institutions or conversely, challenges for dual management and oversight. Seven of the 14 MPAs are co-managed by different NGOs.

A major component of the Project was directed toward measures to improve the effectiveness of the management of the Belizean system of MPAs. This project allowed many MPAs to move from 'paper parks' into functioning protected areas. Previous to the project, only 2.3% of MPAs were operational. The project has caused this to increase to 51.5% of MPAs being operational (July, 2004). This includes 7 new MPAs established under the project. These 7 MPAs have been operational since 2002, having received all basic infrastructure and equipment. All 5 management plans have been revised and the MPAs are currently utilizing these plans to guide the daily management of the reserves. MPA staff has received the necessary training including patrolling and enforcement, boat maintenance, monitoring and assessing management effectiveness. The MPAs have received basic infrastructure, boats and monitoring equipment, with 24-hour staff appointments. Reserve biologists, rangers and support staff are in place, boats and equipment have been procured, and reserve buildings and facilities have been constructed. With the human and physical infrastructure largely in place, the focus now is to make it operational in an efficient and effective manner and to maintain that which has been achieved.

Financing the MPAs has become the full responsibility of government and co-partner agencies since being transferred from the Project in December, 2003. Both government and co-management partners have secured financing for staff and basic operations through April, 2005. The MPA fee collection mechanism is being developed through guidance from a working group, but its level of activity is uncertain.

The co-management partners have been key in leveraging considerable financial support for protected areas management and have contributed significantly to the establishment and strengthening of the MPA network through their efforts at the site level. However, effectiveness of management is somewhat mixed across the network,

depending on the strengths and weaknesses of the NGOs and the oversight of government departments. A study of management effectiveness of the Belize MPA System (McField, 2000) indicated that the level of management by NGOs has in general been more effective than that provided by the Fisheries and Forestry Ministries. A systems-wide approach would offer up opportunities for streamlining MPA management.

Marine Protected Area Advisory Committees have been established for 5 of 7 of the MPAs that were supported by the project. The major limitation in achieving this output has been the dependency on the Fisheries Department, the responsible management agency, to schedule and hold regular meetings. The Fisheries Department has also been limited by lack of resources for standard patrols.

Although data and monitoring reports have not been numerous nor has there been sufficient time to identify the trends and impacts that this MPA effort has had on the reef's health and biodiversity, it is clear that the presence of this peopled management system has deterred illegal fishing and other activities that damage the reef system and has educated visitors and users of the reef ecosystem about more sustainable ways of interacting with it. Due to increased and more efficient patrols, arrests are made routinely for infractions within the MPAs and several of these cases have been prosecuted in the courts, resulting in fines or imprisonment. There is some anecdotal observation that the fish catch has been up during the last few years corresponding to the establishment of reserves and no-take zones.

The operations of such a spread-out and sometimes isolated marine reserve staff have inevitably presented difficulties leading to concerns raised about some unprepared newly hired personnel and equipment in need of repairs or just not available in a timely fashion. This situation was exacerbated by different interpretations of respective responsibilities wherein key personnel within the Fisheries Department claimed historical ownership of and statutory responsibility for MPAs, while the CZMAI was the fiscal and project manager. This caused negative impacts including delayed procurements, confused reporting lines, data not regularly shared and culminating in major personnel changes. This situation is widely recognized and in the past, has led to less enthusiastic participation in the project by other agencies and groups. In two reserves, the jurisdictional issue is confused further with the lead agency being the Department of Forestry.

This situation is the result of confusion about the goals and activities of the GEF project versus the institution and programs, the evolving and larger scope activities of the CZMAI program and the awkward institutional placement of both in the Ministry of Agriculture and Fisheries. The previous leadership at CZMAI had initiated discussions with the Department of Fisheries about utilizing a MOU as a first step to clarify and expedite the day-to-day operations and management of the marine reserves. The difficulties with the MPA experience highlight the need for and purpose of an ICZM approach that emphasizes mechanisms for effective integration of agency agendas and coordination of their actions. A well-crafted MOU should ameliorate the immediate situation; however, the long-term success of ICZM will more likely require careful re-assessment of the larger institutional arrangements for both entities. The CZMAI has to determine its role, if any, in MPA management after the transition from project to program.

In February, 2004, serious about ICZM, the Belize Government agreed in principle to a contract to CZMAI for the management of Goff's Caye for one year and an entry fee to the Caye of US\$10 to non-Belizeans. However, the reduced area agreed to in compromise facilitated operators to boycott CZMAI management. In March 2004, CZMAI was conducting a series of stakeholder consultative meetings with regard to the mechanisms for implementation and timing. The CZMAI was unsuccessful in its bid to introduce a new Divers Fee, Snorkelling Fee, and Sport Fishing Fee to take effect in November, 2004. Instead, CZMAI was informed of a moratorium on any new taxes and fees on the tourism industry.

The CZMAI, when active again, should strive to improve the long-range operational aspects of the MPA network and in the process consider which aspects of it are most germane to the CZMAI broader coastal management mission (e.g., CZMAI – coordination, policy development and research, technical assistance, public information and education; as distinguished from – MPA management, patrol and enforcement, maintenance and other functions more germane to Fisheries). There are also opportunities to maximize the synergistic benefits of other programs, in particular the ambitious Mesoamerican Barrier Reef System project.

An example of an institutional responsibility which CZMAI has assumed during the project is being the Secretariat for the national committee for MBRS. The Belize Barrier Reef Committee (BBRC) has as co-chairs, Fisheries and CZMAI. Additionally, 7 of the MPAs are recognized World Heritage Sites and the BBRC has been designated National Liaison to UNESCO for WHS. CZMAI again is the Secretariat for the BBRC World Heritage Sites Sub-committee. In turn, the WHS Sub-committee has also assumed duties as the Local Consultative Body for the project, Community Management of Protected Areas (COMPACT). It is interesting to note that the WHS sub-committee is still meeting with CZMAI as Secretariat, as both WHS and COMPACT activities are current and ongoing. Both WHS and COMPACT have attracted funding to projects for improved management of WHSs and MPAs in coordination with the surrounding communities. Of all CZMAI core committees, the WHS Sub-committee is the only one with the chairperson and deputy chairperson being private sector representatives.

Cost-effectiveness

Although the annual project reports indicated that there were problems with timely disbursements at the beginning of the project, all project funds were expended by project's end. Co-financing commitments have been largely honoured. Yet, the situation encountered at the time of evaluation indicates that the cost-effectiveness of the project investment has been low. The CZMAI is a non-functional institution at present, and the technical capacity and experience developed during the project is now largely gone from the Agency, but not necessarily from Belize. Some project benefits remain, including public awareness, species research, the library collection, the system of functioning marine protected areas, the coastal zone management strategy, and draft guidelines for coastal development.

- Execution and implementation modalities

UNDP/GEF has been a key partner for the Government of Belize during both the pilot and the most recent phase of this project over the past ten years. Their oversight, participation and facilitation skills have enabled the program to evolve in an incremental

and positive manner. UNDP country office personnel are very knowledgeable about this project, its progress and the country context within which it is being carried out. The Assistant Resident Representative has been an observer/participant at CZMAI BoD meetings and UNDP staff have facilitated several strategic planning sessions.

However, the risks to institutional and financial sustainability were apparent mid-way through the project and UNDP should have intervened more firmly with respect to obliging the Government of Belize to resolve these issues. While recognizing the inherent sensitivities in working closely with a partner government and acknowledging UNDP's repeated efforts to make its views known to the Government of Belize, its approach was perhaps too conservative. There should have been in place a firm process of handing over responsibility from the donor to the Government with clear checks and accountability measures along the way. As a partner in development, UNDP's role needs to be both the provider of incentives (e.g., financial support and professional business management) and the agent of accountability (for results and country ownership and ability to withhold or re-direct funds).

The Project would have been better managed if the Project Steering Committee had been made independent from the BoD of the CZMAI. UNDP/GEF could have helped make up for the inaction of the BoD by establishing an effective and independent Project Steering Committee. This error in project design may not have been obvious at the beginning, but by mid-project the deficiencies of the BoD were clear, but no action was taken to activate an alternative project Steering Committee.

During interviews, it was also indicated that the Fisheries Department would not account for over \$300,000 worth of equipment provided to them by the Project. To end the standoff, it was decided to simply write-off the equipment. This would seem to indicate a UNDP/GEF deficiency in oversight of project resources, and of the accounting practices of the auditor.

While UNDP-GEF may be reluctant to provide further support to the Government of Belize, this decision should be considered in a broader context. That is, donor support to this project has been significant and sustained over the past ten years; cutting off all avenues of further support, particularly during a time when the government is facing significant fiscal challenges, could result in the loss of the total investment. UNDP should continue to work with the Government to help them develop and put in place a process for financial and institutional sustainability, perhaps through a smaller, medium-sized project, GEF Small Grants, and access to other sources of partner and donor support. This should, however, be contingent upon a clear commitment by the Government to assume responsibility for long-term ICZM in Belize, to make whatever core contributions it can within its capacity, and to develop a comprehensive business plan that would include a much more diversified portfolio of financial and partner support.

In future UNDP/GEF-supported projects, a much clearer and firmer contractual obligation should be in place with recipient countries, to ensure that transition from donor-supported project, to country-supported program is ensured. A series of successive indicators of financial sustainability during the life of the project would help to track the situation.

4.3. Results

Attainment of Outcomes/ Achievement of Objectives **MARGINALLY SATISFACTORY**

The evidence gathered by the Evaluation Team leads us to rate the attainment of the project objectives and outcomes as indicated in the following table (HS = Highly Satisfactory; S = Satisfactory; and U = Unsatisfactory, as defined in the Monitoring and Evaluation policy at the project level for UNDP/GEF). The evaluation team feels strongly that the assessment of project outcomes must be rated separately for (i) what was achieved during the life of the project and (ii) their sustainability. While this is not called for in the UNDP/GEF evaluation framework per se, our findings cause us to assign ratings accordingly in order to give a fair and realistic assessment.

#	Outcome	Rating	
		In-project	Sustainability
1	Consolidate capacity to effectively integrate biodiversity conservation concerns into a Coastal Zone Policy Framework	S	U
2	The Belize Barrier Reef Marine Protected Area Network is established and fully functional	S	S
3	Caye development plans are integrated with marine biodiversity conservation concerns through a demonstration project	HS	S
4	A sustainable financing mechanism for marine biodiversity conservation is established and operational	U	U
5	Legal and regulatory capacities for facilitating bioprospecting agreements are in place	U	U
6	Training, awareness-raising and information dissemination activities garner public support for biodiversity conservation through coastal zone management and the barrier reef protected area network	HS	S

The Evaluation Team agrees, for the most part, with the ratings assigned in the 2004 Annual Project Report (APR), with the exception of bioprospecting (which it rated as S) and Outcome 6, which we rated higher during the course of the project.

The rationale for these ratings is included in the following sections. By way of illustrative example though, Outcome 1 is rated unsatisfactory post-project, because the lack of financial sustainability has caused the CZMAI to shut down, losing most of the capacity it built. While the Caye Development Plans (Outcome 3) are solid, consensus-based documents that some communities are applying, the guidelines were never approved by the CZMAI Board of Directors and did not reach Government for approval. This delay in approval allowed land development on Caye Caulker to speed up in anticipation of restrictions, thus circumventing the intention of the guidelines.

Sustainable Financing:

It is clear, 8 months after the end of the project that the project's most lethal short-coming was the inability to develop sustainable finance to maintain and expand on the achievements obtained during project implementation. The issue of financial sustainability is inherent in the CZM Act, explicit in this UNDP/GEF/EU project's objectives, and has been the subject of several studies, consultations and internal discussions between 2000 – 2003 (see annex 5, "Chronology of CZMAI Initiatives for Financial Sustainability"). This work provides a wealth of information and ideas on how

to operationalize a financing system for ICZM and its MPA network. However, the design of the UNDP/GEF Project contained a major flaw in that it greatly underestimated the resources needed to achieve sustainable finance. It focused on identifying a mechanism for sustainable finance rather than including a provision for full-time, specialized personnel to pursue the many ideas and recommendations, and implement those that proved most feasible. The assumption was that the technical personnel of the CZMAI, trained in the natural and biological sciences, would have the time, capacity, motivation, and Government support to implement a financial strategy. This assumption proved to be erroneous.

Thus, the project has come to a close without a clear and satisfactory resolution of this central issue, nor the staff or institutional structure to pursue it. As the project wound-down, the staff complement was cut from 26 down to 7, allowing little more than a caretaking mode to be realized since mid-2004. There is currently no CEO or Director in place and the Board of Directors has become inactive. The Advisory Council is to be commended for its diligence in continuing to convene at this juncture, but its advice currently has nowhere to go.

Since sustainable finance is a necessary condition for resuscitation of the CZMAI, the development of a small Sustainable Finance Unit, housed within a re-constituted CZMAI, with the requisite capacity, mandate and political support, is the key to moving forward. The study, "Operationalizing a Financing System for Coastal and Marine Resource Management in Belize", which was funded by the project, has, through a participatory process, come out with clear recommendations for the development of sustainable finance for the CZMAI and MPAs. However, these recommendations have not been implemented.

The major conclusion of the financing study was that the currently installed capacity for sustainable finance of natural resource management programs in Belize lies within the Protected Areas Conservation Trust (PACT), and that for efficiency's sake, PACT should be designated the entity to administer a CZMAI and MPA Trust Fund, if a series of conditions could be met. The real challenge is creating and implementing the sustainable finance strategy by identifying relevant income opportunities, constantly assessing economic realities and promoting, negotiating, and putting into place the required mechanisms and developing, selling, and following-up on project proposals. Administering and dispersing the funds that are raised is a much more straight-forward exercise.

Thus, the most immediate requirements for achieving sustainable finance of the CZMAI are: the development of a specific and practical action plan; a proposal to develop a Sustainable Finance Unit (SFU) within CZMAI; and to implement an aggressive search for funding to implement the proposal. Within this context, it would seem a logical move for UNDP/GEF to consider the use of GEF project development funds to generate the CZMAI – SFU action plan and proposal, and a medium sized-grant to get the SFU up and running. In this way, the already considerable investments of UNDP/GEF could be "made whole" by assuring the survival of the CZMAI. A project of this nature would, however, need to run in parallel with the revision and strengthening of the BoD, and utilization of the various funding possibilities and in-kind services already identified that would make possible the slow but sure resurrection of the technical capacity of the CZMAI.

One other possibility might also be explored. The Ministry of Natural Resources is currently developing a GEF grant proposal for the development of the protected area system, and PACT will play an important role in the project. It may be considered desirable to include the development of the CZMAI - SFU as a component of this project, particularly if the Ministry of Natural Resources is considered a more logical placement for the CZMAI than its current home in Fisheries and Agriculture, and if both marine and terrestrial protected areas are included in the system plan project.

This issue, more than any other, is critical to the long-term success and sustainability of ICZM and biodiversity conservation in Belize. Nationally, it is recognized that financial sustainability is a challenging but important issue, especially given the macro-economic context and the high importance of the natural assets to economic development, especially the tourism and fishery sectors. The excessive reliance on external funding and an inability to achieve sustainable financing, besides significantly affecting national investment in ICZM, will undoubtedly negatively affect Belize's reputation and standing with international donors.

Until now, the CZM Authority has been funded by the central government and the technical arm, the CZM Institute, externally funded through the GEF over the past ten years. The CZMAI has been operating within a project culture for its entire life. UNDP/GEF may be able to support small project funding (even perhaps a medium-sized, transition phase), but long-term financial sustainability is ultimately the responsibility of the Institution. A budget of BZ\$214,578 for FY 2005/06 has been submitted by the Authority to the GoB and awaits approval.

The 2004 report on Rationalization of ICZM in Belize outlined key services and propensities for fund raising for both the Authority and Institute. The CZMA's propensity for fund-raising for its services, and likely sources to raise financing includes – PACT, central government and international grant-giving agencies. Surcharges on relevant industries, bilateral and multi-lateral donors are other, but less likely sources. It was recommended that CZMI should increasingly earn its income from fee-for-service such as – research, data management, EIA, laboratory tests and training. Charges for coastal development applications should also be considered. The Institute's propensities to raise funds for its key services, in ranked order include: stakeholder industry membership organizations, user fees including contracted services, PACT, multi-lateral and bi-lateral donors, international grant-giving institutions, GoB and surcharges on relevant industries in Belize. However, what have not been considered adequately are the institutional and administrative arrangements, and personnel, that would be needed to implement these financial mechanisms. This is a continuation of the project approach that emphasized the "what" (a search for potential sources of funding) without putting into place the "how" (the institutional capacity to develop an effective program for sustainable finance).

Recently, the CZMAI, with support from government, has decided to provide management services in exchange for attraction fees, at a marine location. This initiative is entrepreneurial but does not guarantee required income, nor does it deal with the central problem which is the lack of institutional capacity for sustainable finance. It also will cause the CZMAI to deviate its attention from its core functions. The CZMI had a potential for internal financing of a percentage of its budget from services. It was initiating the provision of such services with government support. This capacity dissipated at the close of the project, but could be reconstituted if staff is re-hired.

The tourism industry presents a major funding opportunity. Tourists have repeatedly demonstrated, through willingness-to-pay studies, that they are ready to contribute to conservation efforts. The Reef is the key component of the country's national capital upon which external resources will depend. It is important that fees be introduced in a consistent, transparent and non-cumbersome manner and accompanied by a strong communications strategy. However, reliance on only one industry (i.e., tourism) will subject the fate of the reef and coastal zone to the mercy of the ups and downs of that sole industry. Tourism is not monolithic in Belize. There has been a long and steady growth of what some call 'eco-tourism', wherein smaller numbers of tourists come to enjoy the inherent beauty of the Belize Barrier Reef System and smaller operators can support, guide and service this group. However, there is a serious rift developing in the tourism industry between the cruise industry and the traditional long-stay industry. Cruise ship traffic has been allowed to mushroom almost uncontrolled in the span of one year. There are numerous reports of irregularities being allowed to the cruise industry – anchoring on coral, illegal guide-to-visitor ratio in boats and on busses, taking of coral, etc. from the reef as souvenirs, and increasing amounts of cruise ship garbage and litter at sea and at other sites.

Contractual obligations under this project call for the establishment of a 'Barrier Reef Trust Fund' (either as a separate fund or as a sub-account of PACT) wherein revenues would come from the implementation of revenue-generating measures such as user fees. Recommendations for fees and taxes to be introduced include – MPA entrance fee for all 14 MPAs; nationwide diving fee, sports-fishing licenses fee and a snorkelling fee. It is also recommended that a part of the proposed increases to the cruise ship head tax be allocated to ICZM activities. Similarly, it is recommended that any increases to the airport departure tax, as well as new charges at the borders, be shared with the CZMI.

In January, 2004, Cabinet approved: the allocation of BZ\$132,000 to sustain the level of MPA services previously offered by the CZMAI (for 3 months); the proposal to institute a visitor entry fee at all 14 MPAs (effective July 1); that PACT be used as the trust fund mechanism for establishing the 'Belize Barrier Reef Trust Fund window' for funds generated by both the MPA network and ICZM; a management contract to CZMAI for Goff's Caye and that a user fee be charged after the basic infrastructure has been installed; and appointed a working group to operationalize these decisions but its progress at this point is unclear. Cabinet approved the levying of a standard MPA entrance fee and a user fee for Goff's Caye management area, which is highly visited by cruise tourists. However, when instituted, the cruise ships boycotted the area and went elsewhere, where there were no fees at all. This speaks to the need for a holistic approach so that the marine users of the resources pay their fair share. Additionally, the cruise industry is the sector of the tourism industry needing the most monitoring in marine areas and should bear the cost of this monitoring.

Discussions with the Cruise Ship Association and other Tour Operators, has shown that there is great interest in developing the area nearest the Belize City Hub, namely the Goffs, Sergeant, Rendezvous Area. At least three proposals have been received by the Government to date, none of which has been accepted. One corporation has offered a contribution of BZ\$40,000 monthly to the CZMAI in order for it to carry out its activities. It offers the opportunity to keep the Authority going and involved in the management and safeguarding of critical coastal resources. While this proposal may appear to be an

immediate solution to an intractable problem, strong concerns have been expressed (subsequent to the in-country evaluation) by Government Ministries and numerous stakeholders that no one developer be allowed to control any part of the reef; no permanent structures should be erected on the reef or in the open sea inside the reef; CZMAI fortunes should not rely on one private developer; and that BZ\$40,000 would pay for basic staff but not enough for programs, thus it is not an adequate return for the value of the resource. CZMAI would also be forfeiting all income from the collection of user/entry fees to this area and would concede exclusivity to this one tourism developer.

Any new source of funding, especially if it is derived from an increased fee or new revenue sources, will be accepted and implemented more effectively if the general public is convinced that the revenue will go directly to an advertised cause or known program or agency. Relevant stakeholders must also be an equal part of the decision-making body governing these funds. The need for a communications strategy is imperative in this regard. Recent developments indicate that various supporters of the CZMAI (e.g., WRI, WCS, WWF, BAS, BTIA) are rallying with critical immediate financial and/or in-kind assistance to maintain core functions of the Institute and are lobbying the GoB for necessary improvements to legislation.

In order to sustain and implement the National ICZM strategy and an ICZM program, a financing mechanism must be identified and a framework for sustainability implemented. A path-forward on financial sustainability should be organized into (i) Immediate (2005); (ii) Mid-term (2006-2008); and (iii) long-term (2008–beyond) strategies. The proposed Sustainable Finance Unit would have the immediate responsibility to identify and rank the priority actions. The following actions are offered as a starting point.

Immediate:

- A corporate-oriented Board of Directors develop the CZMAI image, products and services and market to develop income lines
- The GoB provide ongoing financial support/appropriations of CZMA (approve budget for 05)
- An interim or new Director of the CZMAI initiate immediate discussions with UNDP for both/either – a transition, medium-size project, and other small project funding
- Accept the resources offered by WCS and WWF for the CZMAI's Director (several months' salary) to initiate fundraising
- Further explore CZMAI-Private Sector partnerships for concessions, but with appropriate caveats (i.e., not forfeiting the lion's share of income earning capability, nor compromising equitable access to the country's heritage)
- Begin preparing applications for Foundation grant-giving and traditional funding grants
- Explore bridging funding with PACT based on a firm strategy for rehabilitation of CZMAI; agreement with PACT to pursue fundraising strategy
- Accept the offer from the World Resources Institute (WRI), through its Reefs-at-Risk Project, to pay the salary for a data analyst at CZMI.

Mid-term:

- CZMAI should pursue a diversified portfolio of funding (fees, taxes, services, donations); reliance on only one industry (i.e., tourism) will subject the fate of the reef and coastal zone to the vagaries of that sole industry

- Explore potential revenues from various licenses and user fees for services provided such as diving fees, sport fishing licenses, coastal development applications, rental of seabed used for piers, jetties, moorings, anchoring, floats, seawalls, etc.
- Link with GEF Protected Areas Systems proposal being led by the Natural Resources department with specific reference to how MPA revenue would directly benefit CZMAI
- CZMAI should investigate the feasibility of charging fees for an expanded set of data centre services, especially to private sector consultants. It would be more cost-effective for some entities to utilize CZMAI's capacity rather than make the substantial capital investment themselves.
- Transfer title to the land on which the CZM building sits to CZMAI. Beyond bringing clarity of ownership, this presents opportunities for rental income.

Long-term:

- Develop a professional business, marketing and fund-management plan that clearly identifies long-term requirements to sustain and support the Authority and Institute and matches these to viable partners
- Have the CZM Institute recognized as a Centre of Excellence, locally and regionally

5. RECOMMENDATIONS

There are several clear and immediate steps that should be taken to ensure the ongoing operation and success of this project, cum program.

1. Financial sustainability is the most important and immediate task at hand. The Government of Belize must make a financial commitment within its current capacity, however modest, to provide continued support to the Authority and to send a clear signal to the donor community that it recognizes the fundamental need for the conservation and wise development of its key natural asset – the Belize Barrier Reef – and the ongoing ownership and support of the ICZM program. The proposed Authority budget for FY 2005-06 should be supported and confirmed as soon as possible. Authority and Institute staff salaries and benefits should be re-aligned with equivalent positions within government and all opportunities for streamlining should be pursued.
2. Leadership positions within the Authority and Institute should be restored immediately. Conscious of the uncertain financial future, yet cognizant of the need for key positions to be filled, we recommend the hiring of three key positions – a combined CEO/Director position filled by a candidate with technical and entrepreneurial business ability; a data manager; and an administrative assistant. The senior position would focus on a combination of policy advocacy and securing financial support for the programme, especially for development of the Sustainable Finance Unit. The data manager would restore the broad access to and use of the valuable information system that was built so diligently throughout the project. An administrative assistant would ensure the ongoing operation of the programme. Further staff could be added as additional resources are secured. Financial sustainability must become the top priority for CZMAI leadership, working closely with the BoD, PACT, the Ministry of Fisheries and other relevant entities with coastal and ocean agendas and responsibilities.
3. The other core problem with the current CZMAI is more one of management than structure. The Board of Directors of the Authority should be streamlined and realigned. It is essential that the restructuring of the BoD be carried out as a matter of priority so that the Board can play a critical role, as it should, during the crisis period. The balance among governmental and non-governmental representatives, including private sector organisations, should be altered so that government representation is in the minority. Since the CEOs are extremely busy, technical officers should be able to represent the various Ministries. Stronger buy-in and a more comprehensive perspective could be supported by allowing the Board Members to select their own Chair on an annual basis. The requirement for a quorum of CEOs should be amended to require only a quorum of board members. There is also a need for performance accountability for individual Directors and compliance procedures to implement and/or enforce decisions. Linkages between the Advisory Council and BoD need to be strengthened by ensuring that the Chair of the AC has a seat on the Board; and by having regular AC reports tabled for discussion and review. Efficient and effective Board performance requires a well-resourced Secretariat made up of key staff of the CZMAI. The BoD should be more proactive in forming subcommittees, based on need, that report back to the full Board. A comprehensive performance appraisal system for Board Members needs to be

developed and utilized to find ways to improve performance. There should be regular reporting on ICZM issues to the BoD by permitting agencies.

4. A new Director of CZMAI should initiate immediate discussions with UNDP about its continued support through another 'transition' (medium-size) phase and utilizing short-term funding available through other UNDP programs that could support specific program objectives. The principal focus should be on developing a Sustainable Finance Unit within the CZMAI.
5. The Institute should be re-aligned with the University of Belize to take advantage of the synergies available in research, education and advocacy. The draft Agreement for Institutional Cooperation between the University and the Institute should be finalized and implemented.
6. Opportunities for private sector and NGO partnerships and support for the Institute should be explored and secured as a matter of priority by the new SFU. The long-term sustainability of the programme requires a much more entrepreneurial attitude and approach. Any negotiations with the commercial sector could lead to immediate financial relief, but should be considered only as long as the ICZM programme's objectivity and ability to protect the conservation and biodiversity of the coral reef ecosystem is not compromised in the process. Caution should also be exercised in relying too heavily on one sector for support. Collaborative opportunities for financial and/or in-kind support from NGOs (e.g., Belize Audubon) in areas such as the loan of a data manager have been offered and should be followed up.
7. The Advisory Council appears to be functioning effectively, convening diverse parties and producing consensus direction. However, it should be better supported by the BoD and its advice headed more consistently. Even broader representation by people truly committed to ICZM should be considered as members and the chair should rotate beyond government reps. Its impact appears to be constrained through the filter/bottleneck of the BoD and Department of Fisheries. A more direct path for its advice to Cabinet would provide the basis for more informed decisions.
8. During the interviews carried out for the evaluation, there was consistent reference to the fact that the relationship between the Department of Fisheries and the CZMAI has always been one of tension, disagreement, non-cooperation, and in many instances, outright hostility. This has not varied even with changes in personnel in Fisheries and in the CZMAI. This has undoubtedly had a negative, and draining influence on the performance of the CZM Program. It does not matter which institutions or individuals are to blame, and most probably the blame can be shared. The fact is, however, that there is widespread recognition that the placement of the CZMAI within the Ministry of Fisheries has not worked. At the same time, Cabinet has decided to retain the CZMAI within the Ministry of Fisheries (now the Ministry of Fisheries and Agriculture). However, given the findings of this independent evaluation, and given the restricted mandate of Fisheries, it is recommended that Cabinet reconsider the placement of the CZMAI within Fisheries and Agriculture, and that it be moved to Natural Resources or National Development. As a complement to this action, and to ensure the practical independence of the CZMAI, it is recommended that the

deed to the land on which the CZMAI building is constructed should be transferred to the CZMAI.

9. The world-class reputation and value of the Belize Barrier Reef represents substantial marketing and partnership opportunities with many international organizations. The economic value of this natural capital to both national GDP and world heritage should be quantified and used strategically to demonstrate the value of investment in its conservation and wise management over the long-term.
10. The regulations concerning bioprospecting should be finalized and implemented without further delay.
11. MOUs should be developed between the CZMAI and agencies with which it works to enhance political support and clarify institutional relationships. Strategies are also required to target politicians more effectively in awareness activities.
12. The Coastal Zone Management Act should be revisited to make some necessary adjustments. Specifically, the limited spatial definition of the coastal zone should be expanded to encompass those activities on land that directly impact on the quality and sustainability of the coastal zone. Careful consideration should be given as to whether the inland boundary should encompass entire watersheds, or a more limited near-shore zone. The offshore boundary, at 12 nm., is sufficient at this time but could be re-examined if and when more offshore activities appear to impact on the coastal zone.
13. Now that the CZM Strategy has been approved by Cabinet, the CZM Plan should be developed and implemented as soon as the Institute has recovered its technical capacity.
14. The head of the Authority should meet with the relevant sector Ministers to brief them on decisions that s/he will have to take to Cabinet from time to time.
15. When again functioning, the CZMAI should address a number of current gaps as well as prospective issues including: cruise ships, oil exploration and oil-spill contingency plans, artificial reefs, alternative energy and sewage treatment technologies for rural communities. In addition, serious attention must be focused on the predicted impacts of climate change on the coastal zone and barrier reef of Belize. The 2004 edition of the "Status of Coral Reefs of the World" report warns that 20 percent of the world's coral reefs are so damaged that they are unlikely to recover, while another 50 percent could collapse. The report says that global warming is the single greatest threat to corals, based on the findings of 240 experts from 96 countries that participate in the Global Coral Reef Monitoring Network. The scientists predict massive bleaching events will be a regular occurrence within 50 years.
16. ICM project interventions normally shift the distribution of costs and benefits related to natural resource management among different stakeholders, often increasing costs to those relatively few who have traditionally held power, and increased benefits to the many less influential and directly-identifiable

stakeholders (e.g., non-traditional resource users and general public). As the CZMAI begins to recover and implements new activities, the shifts in costs and benefits need to be tracked so that measures can be implemented to mitigate injustices that might arise and threaten the long-term cooperation and adherence to the program's objectives. The project originally considered the development of a fund for alternative livelihoods for those stakeholders whose activities are displaced. This is a continuing need that still must be addressed, and should be added to the activities of the Sustainable Finance Unit.

17. Belize should consider participating in the establishment of Tsunami early warning systems for the Caribbean.
18. Once the future of the CZMAI is relatively clear, the MOU for cooperation between the UB and the CZMAI should be resurrected, revised where necessary, and implemented.

6. LESSONS LEARNED

The lessons learned from this process can prove very useful for other countries in the region with a view to developing capacities and moving forward the framework for ICZM.

- Financial sustainability - with specific, verifiable indicators at defined points in the project life - must be the priority focus of any such project, acknowledging the magnitude of the effort that will be required and assigning adequate resources for its fulfillment.
- Good governance and stewardship of the institution is a must, and the inclusion and effective mobilization of civil society is essential to achieving this.
- While the institutional arrangements for the project and for ICZM in general may be spelled out in the project document and the CZM Act, it is necessary to continually refer to these to eliminate conflicts and clarify responsibilities.
- The approach to ICZM that Belize has adopted through the establishment of the CZM Authority and Institute which focuses on coordination, planning and policy development, advising, collaborating and monitoring, rather than on regulatory or permitting functions, is a sound approach that should be emulated.
- There are constant challenges and conflicts faced during projects such as this in instituting an organization for ICZM while implementing a project. This often resulted in the majority of time and focus spent on achieving project outputs and not sufficient priority placed on establishing and expanding on the ICZM Strategy and program.
- The high point of the CZM Strategy adopted in Belize is that it details a participatory process for decision making over the use of the coastal resources to ensure that the economic benefits are closely linked with equitable allocation and sustainable use. This approach is an important model for other countries in the region and other related projects.
- The importance of scientific knowledge and actionable data as essential inputs for guiding the adaptive management of natural resources and biodiversity conservation.
- The Caye Caulker coastal planning experience in formulating development guidelines through a CAC, has demonstrated strong support for community/ stakeholder participation in decisions regarding the use of their coastal resources. At the same time, it has provided a forum for citizens to examine and discuss issues affecting their community and resources, thereby creating ownership. This phenomenon has resulted in support for CACs across the other 7 coastal planning regions and the lobbying for adoption of the guidelines and empowerment of communities in monitoring the development and use of the coastal resources in their regions. However, where the process is too lengthy and advice is not heeded, disillusionment inevitably sets in. Hence, the need for the Plan to be accepted for enforcement by GoB with haste.

- The project has provided some important lessons regarding advocacy and awareness for sustainability issues. The project has not considered the importance and necessity to have a targeted advocacy campaign regarding sustainable financing and the issue of user fees for coastal resources. As such, considerable time was spent in building a basic understanding of the need for user and entrance fees in ensuring sound management of resources and biodiversity conservation. The critical lesson learned here is that projects that look at financing options for biodiversity conservation must be designed with a specific advocacy component to address not only the user or stakeholders, but also importantly the policy and decision makers (governments).
- Throughout the project, the CZMAI has shared lessons learned from the Belize model and benefited from exchanges with other countries in the region and globally.
- In future UNDP/GEF-supported projects, a much clearer and firmer contractual obligation should be in place with recipient countries, to ensure that transition from donor-supported project, to government-supported program is ensured. A series of successive indicators of financial sustainability during the life of the project would help to track the situation.
- While a solid logical framework is crucial to organizing and structuring the project and for creating accountability, it can also become an obstacle to creative analysis and thinking. Thus, specific activities need to be planned to encourage staff to think outside the box, question logic, and develop intuition. These are essential skills for adaptive management, especially when a project is creating an institution.

7. ANNEXES

- 7.1 Terms of Reference
- 7.2 Itinerary
- 7.3 Persons Interviewed
- 7.4 Documents Reviewed
- 7.5 Chronology of CZMAI Initiatives for Financial Sustainability
- 7.6 Non-government Contributions to the Project

ANNEX 1 – TERMS OF REFERENCE

Independent Final Project Evaluation Conservation and Sustainable Use of the Belize Barrier Reef Complex (BZE/98/G32/A/1G/99)

I. INTRODUCTION

UNDP/GEF Monitoring and Evaluation (M&E) policy

The Monitoring and Evaluation (M&E) policy at the project level in UNDP/GEF has four objectives: i) to monitor and evaluate results and impacts; ii) to provide a basis for decision making on necessary amendments and improvements; iii) to promote accountability for resource use; and iv) to document, provide feedback on, and disseminate lessons learned. A mix of tools is used to ensure effective project M&E. These might be applied continuously throughout the lifetime of the project – e.g. periodic monitoring of indicators -, or as specific time-bound exercises such as mid-term reviews, audit reports and final evaluations.

In accordance with UNDP/GEF M&E policies and procedures, all regular and medium-sized projects supported by the GEF should undergo a final evaluation upon completion of implementation. A final evaluation of a GEF-funded project (or previous phase) is required before a concept proposal for additional funding (or subsequent phases of the same project) can be considered for inclusion in a GEF work program. However, a final evaluation is not an appraisal of the follow-up phase.

Final evaluations are intended to assess the relevance, performance and success of the project. It looks at early signs of potential impact and sustainability of results, including the contribution to capacity development and the achievement of global environmental goals. It will also identify/document lessons learned and make recommendations that might improve design and implementation of other UNDP/GEF projects.

Project background

This project builds on the achievements of a pilot phase initiative. At that time there were concerns regarding impacts to the coral reefs and other coastal habitats by inappropriate coastal development involving dredging and land reclamation, and the run-off of sediment, agricultural chemicals and sewage. Several of the marine protected areas had inadequate on-the-ground management, and generally there was the need for more community involvement in coastal resources management. Furthermore, the need was recognized to continue the public awareness campaign to increase the understanding of coastal zone management, targeting specific audiences. Moreover, a financing mechanism that would ensure the sustainability of the programme was lacking.

This Project therefore aimed to support the Government of Belize in addressing these needs and consolidating the integrated coastal zone management programme by undertaking targeted interventions for biodiversity protection in a sustainable manner. These measures include strengthening the planning, management and operation of a network of seven marine protected areas (five of which are World Heritage Sites); integrating development planning on the cayes with marine biodiversity conservation principles; developing a sustainable financing mechanism; establishing legal and

institutional capacities for facilitating bioprospecting; and complementing widespread environmental conservation advocacy with coastal and marine biodiversity concerns.

The Project began in mid 1999 and is nationally executed through the Ministry of Agriculture, Fisheries & Co-operatives. The implementing agency is the CZM Authority and Institute, with its Board of Directors acting as the Project Steering Committee. According to the Project Document, a final independent evaluation is required. The Project is co-financed by the European Union, and within the terms of the EU Project Document, the EU component of the project is to be assessed jointly with the UNDP/GEF evaluation.

The Goal of the Project is to secure the conservation of options and existence values embodied in the second longest barrier reef system in the world. The Project Purpose is to provide decision-makers and relevant stakeholders with analytical, management, and technical capacities, decision making and planning tools, and financial mechanisms and economic instruments for the long-term conservation of coastal and marine biodiversity.

The Six Project Objectives are:

- 1) Consolidate capacity to effectively integrate biodiversity conservation concerns into a Coastal Zone Policy Framework.
- 2) The Belize Barrier Reef Marine Protected Area Network is established and fully functional.
- 3) Caye development plans are integrated with marine biodiversity conservation concerns through a demonstration project.
- 4) Sustainable financing mechanism for marine biodiversity conservation is established and operational.
- 5) Legal and regulatory capacities for facilitating bioprospecting agreements are in place.
- 6) Training, awareness-raising and information dissemination activities garner public support for biodiversity conservation through coastal zone management and the barrier reef protected area network.

II. OBJECTIVES OF THE EVALUATION

The objective of the evaluation is to fully review and assess the results achieved by the project during the period of implementation, as well as the impacts and sustainability of these. The Evaluation has been initiated in accordance with UNDP/GEF M&E policies and procedures and will be jointly financed through the project resources, UNDP/Belize and the EU. Specifically, the evaluation should include the following aspects:

- To evaluate the attainment of project objectives and outcomes as documented in the Project's Logical Framework Matrix
- To evaluate project achievements according to GEF Project Review Criteria including Implementation approach, Country Ownership/Driveness, Stakeholder Participation/Public Involvement, Sustainability, Replication approach, Financial planning, Cost-effectiveness, Monitoring and Evaluation (see Annex 1 for terminology)
- Assess strengths and weaknesses in implementation, which might have affected the project's success

- Document lessons learned and best practices from the experience of the project and where these can be disseminated and replicated, both to other GEF projects, as well as with national authorities in follow-up to the project
- Provide recommendations for long-term ICZM program and its implementation in Belize based on the performance of the project and issues regarding institutional and financial arrangements and sustainability

III. PRODUCTS EXPECTED FROM THE EVALUATION

The project evaluation team will produce two specific products. A) a verbal presentation of preliminary findings at the end of the assignment in Belize, given to the UNDP Resident Representative in Belize or his representative, UNDP/GEF, The CEO of the Ministry of Fisheries, the Project Steering Committee, the EU representative, the CEO of the CZM Authority, the Director of the CZM Institute, the CZM Advisory Council and other relevant partner agencies. B) a draft written report which will be sent to the UNDP/Belize ARR within two weeks of completion of the in-country part of the mission for distribution and comments among UNDP and the Government of Belize, and a final written report which will again be circulated to the relevant stakeholders. The final report should be submitted within two weeks of receiving the comments on the draft report. Comments to the draft report should concentrate on possible factual errors in terms of data, rather than questioning the impressions of the evaluator. If there are discrepancies between the impressions and findings of the evaluation team and the involved parties these should be explained in annex attached to the final report. Both reports should be provided in hard copy and on diskette in MS Word to the UNDP Assistant Representative Belize for distribution.

The team leader will be responsible for the preparation of the final report with inputs from the national consultant, according to specific agreement made during the review period in Belize. The evaluation report would summarize the findings, assessment of performance, lessons learned, recommendations and the description of best practices following the outline presented below and including the scope and specific issues provided in Annex 1.

1. Executive summary
2. Introduction
3. The project(s) and its development context
4. Findings and Conclusions
 - 4.1 Project formulation
 - 4.2 Implementation
 - 4.3 Results
5. Recommendations
6. Lessons learned
7. Annexes

IV. METHODOLOGY OF THE EVALUATION

The evaluation will start with a desk review of all the relevant documentation and reports on project activities for the duration of the project period. A list of documentation is provided in annex II of the TOR. The documentation will be provided to the evaluators in advance of the mission to Belize.

Upon arrival of the international consultant to Belize, the evaluation team will receive a Briefing by UNDP/Belize and by the project manager. This will be followed by a series of interviews and meetings with key individuals within the project and government, and with participating agencies, NGOs and private sector organizations. (These should include, for example, staff of the CZMAI, the Board of Directors of the CZMA, members of the CZM Advisory Council, the CEO of the Ministry of Fisheries, partner NGOs, staff of MPAs, members of the Coastal Advisory Committees, the UNDP Country Office), and beneficiaries (Fishers and Tourism Industry partners). The list of key individuals is to be prepared by the National Consultant prior to arrival of the International Consultant. Field visits will also be conducted as necessary to key project sites or areas in consultation with the project manager, UNDP, GoB and the Evaluation Team.

At the end of the mission in Belize, the evaluation team will provide a verbal version of their preliminary findings as explained in section III.

The consultants will do a home-based follow up for completion of the draft evaluation report for circulation and review, and the incorporation of comments for the final evaluation report.

V. EVALUATION TEAM

The team will be comprised of an international consultant and a national consultant, who will work closely with the project staff at the CZMAI. The candidates will be selected by common consent by the UNDP/Belize, UNDP/GEF in Mexico, and the CZMA Board of Directors.

The International Consultant is expected to have an excellent understanding of the principles of integrated coastal zone management, with an emphasis on community-based resources management, and also be familiar with project management in general, and GEF projects in particular. S/he should also have M&E experience, preferably with GEF project evaluations. S/he will be designated team leader and be responsible for delivery of the final report

The National Consultant will be knowledgeable of the institutions responsible for environmental management in Belize and the stakeholders involved. S/he will also be familiar with the status of coastal resources and the issues that are relevant to Belize, but provide a perspective from outside the immediate project environment. The national consultant can provide inputs to the final report, as agreed during the evaluation review.

VI. IMPLEMENTATION ARRANGEMENTS/SCHEDULE

UNDP/Belize will be the main operational point for this evaluation. The office will liaise with the project team in CZMAI to set up stakeholder interviews, arrange the field visits, coordinate with the GOB the hiring of the consultants, ensure the timely payment of fees, travel, and per diems. CZMAI will provide logistical support to the team. With the assistance of the CZMAI, it is expected that the National Consultant will arrange the meetings, plan the field visits, and gather the necessary documentation.

The estimated number of days for the evaluation mission is 18 p/days days for the international consultant, and 12 p/days for the national consultant (excluding the period where the draft report is circulated for comments). The time allocation is expected to be as follows:

- Desk Review prior to in-country mission: **3 working days** for **international consultant** (including travel time to and from Belize), and **1 working days** for **national consultant**
- Arrangement of meetings and field visits: **1 working day** for **national consultant**
- Internal Briefings and meetings with stakeholders in Belmopan and Belize City: **4 working days** for both consultants
- Field trips, stakeholder interviews in the field: **3 working days** for both consultants.
- Validation of preliminary findings with UNDP Country Office and GOB stakeholders: **1 working day** for both consultants
- Preparation of draft final report: **3 working days** for **international consultant**, **1 working day** for **national consultant**
- Preparation of final report: **4 working days** for the **international consultant**
-

An indicative schedule is provided in the table below; the evaluation team will provide a more precise itinerary before the evaluation exercise commences.

Schedule

Task/Days	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Arrange meetings & field visits	*																	
Desktop review	**	**	*															
Interviews and meetings				*	*	*	*											
Field visits & interviews				**	**	**	**	*	*	*								
Validate preliminary findings											*	**						
Prepare draft report & circulate												**	**	**	*			
Prepare and submit final report															**	**	**	**

* National Consultant

** International Consultant

VII. SCOPE OF THE EVALUATION- SPECIFIC ISSUES TO BE ADDRESSED.

This section describes the categories that the evaluation will look into in line with the evaluation report outline included in section III. It also highlights specific issues to be addressed under each broad category. Annex I provides more detailed guidance on terminology and the GEF Project review Criteria should be an integral part of this TORs.

1. Executive summary

- Brief description of project
- Context and purpose of the evaluation
- Main conclusions, recommendations and lessons learned

2. Introduction

- Purpose of the evaluation
- Key issues addressed
- Methodology of the evaluation
- Structure of the evaluation

3. The project(s) and its development context

- Project start and its duration
- Problems that the project seek to address
- Immediate and development objectives of the project
- Special Issues: While likely to be covered as part of the comprehensive evaluation, the following issues have been identified for special attention:
 - 1) Institutional governance for project implementation
 - 2) Financial sustainability
 - 3) Capacity building of the monitoring, research and data management components
 - 4) Policy formulation and impact

 - 5) Stakeholder participation and ownership
 - 6) Public awareness and image
 - 7) Linkages made by the project to issues of sustainable livelihoods
 - 8) Regional ICZM linkages or collaboration achieved
 - 9) Level and quality of support and advisory service provided by UNDP and by GEF
 - 10) Level of improvement and effectiveness of management of the marine protected areas affected by the project
- Main stakeholders
- Results expected

4. Findings and Conclusions

In addition to a descriptive assessment, all criteria marked with (R) should be rated using the following divisions: Highly Satisfactory, Satisfactory, Marginally Satisfactory, and Unsatisfactory

4.1 Project Formulation

- Conceptualization/Design (R). This should assess the approach used in design and an appreciation of the appropriateness of problem conceptualization and whether the selected intervention strategy addressed the root causes and principal threats in the project area. It should also include an assessment of the logical framework and whether the different project components and activities proposed to achieve the objective were appropriate, viable and responded to contextual institutional, legal and regulatory settings of the project. It should also assess the indicators defined for guiding implementation and measurement of achievement and whether lessons from other relevant projects (e.g., same focal area) were incorporated into project design.
- Country-ownership/Driveness. Assess the extent to which the project idea/conceptualization had its origin within national, sectoral and development plans and focuses on national environment and development interests.
- Stakeholder participation (R) Assess information dissemination, consultation, and “stakeholder” participation in design stages.
- Replication approach. Determine the ways in which lessons and experiences coming out of the project were/are to be replicated or scaled up in the design and implementation of other projects (this also related to actual practices undertaken during implementation).
- Other aspects to assess in the review of Project formulation approaches would be UNDP comparative advantage as IA for this project; the consideration of linkages between projects and other interventions within the sector and the definition of clear and appropriate management arrangements at the design stage.

4.2. Project Implementation

- Implementation Approach (R). This should include assessments of the following aspects:
 - (ii) The use of the logical framework as a management tool during implementation and any changes made to this as a response to changing conditions and/or feedback from M and E activities if required.
 - (iii) Other elements that indicate adaptive management such as comprehensive and realistic work plans routinely developed that reflect adaptive management and/or; changes in management arrangements to enhance implementation.
 - (iv) The project's use/establishment of electronic information technologies to support implementation, participation and monitoring, as well as other project activities.
 - (v) The general operational relationships between the institutions involved and others and how these relationships have contributed to effective implementation and achievement of project objectives.

- (vi) Technical capacities associated with the project and their role in project development, management and achievements.
 - Monitoring and evaluation (R). Including an assessment as to whether there has been adequate periodic oversight of activities during implementation to establish the extent to which inputs, work schedules, other required actions and outputs are proceeding according to plan; whether formal evaluations have been held and whether action has been taken on the results of this monitoring oversight and evaluation reports.
 - Stakeholder participation (R). This should include assessments of the mechanisms for information dissemination in project implementation and the extent of stakeholder participation in management, emphasizing the following:
 - (i) The production and dissemination of information generated by the project.
 - (ii) (ii) Local resource users and NGOs participation in project implementation and decision making and an analysis of the strengths and weaknesses of the approach adopted by the project in this arena.
 - (iii) The establishment of partnerships and collaborative relationships developed by the project with local, national and international entities and the effects they have had on project implementation.
 - (iv) Involvement of governmental institutions in project implementation, the extent of governmental support of the project.
 - Financial Planning: Including an assessment of:
 - (i) The actual project cost by objectives, outputs, activities
 - (ii) The cost-effectiveness of achievements
 - (iii) Financial management (including disbursement issues)
 - (iv) Co-financing ¹
 - Sustainability. Extent to which the benefits of the project will continue, within or outside the project domain, after it has come to an end. Relevant factors include for example: development of a sustainability strategy, establishment of financial and economic instruments and mechanisms, mainstreaming project objectives into the economy or community production activities.
 - Execution and implementation modalities. This should consider the effectiveness of the UNDP counterpart and Project Co-ordination Unit participation in selection, recruitment, assignment of experts, consultants and national counterpart staff members and in the definition of tasks and responsibilities; quantity, quality and timeliness of inputs for the project with respect to execution responsibilities, enactment of necessary legislation and budgetary provisions and extent to which

¹ Please see guidelines at the end of Annex 1 of these TORs for reporting of co-financing

these may have affected implementation and sustainability of the Project; quality and timeliness of inputs by UNDP and GoC and other parties responsible for providing inputs to the project, and the extent to which this may have affected the smooth implementation of the project.

4.3. Results

- Attainment of Outcomes/ Achievement of objectives (R): Including a description and rating of the extent to which the project's objectives (environmental and developmental) were achieved using Highly Satisfactory, Satisfactory, Marginally Satisfactory, and Unsatisfactory ratings. If the project did not establish a baseline (initial conditions), the evaluators should seek to determine it through the use of special methodologies so that achievements, results and impacts can be properly established.

This section should also include reviews of the following:

- Sustainability: Including an appreciation of the extent to which benefits continue, within or outside the project domain after GEF assistance/external assistance in this phase has come to an end.
- Contribution to upgrading skills of the national staff

5. Recommendations

Corrective actions for the design, implementation, monitoring and evaluation of the project

Actions to follow up or reinforce initial benefits from the project

Proposals for future directions underlining main objectives

6. Lessons learned

This should highlight the best and worst practices in addressing issues relating to relevance, performance and success.

7. Evaluation report Annexes

Evaluation TORs

Itinerary

List of persons interviewed

Summary of field visits

List of documents reviewed

Questionnaire used and summary of results

Comments by stakeholders (only in case of discrepancies with evaluation findings and conclusions)

VIII. TERMS OF REFERENCE ANNEXES

Annex 1: Terminology in the GEF Guidelines to Terminal Evaluations

Annex 2: List of Documents to be reviewed by the evaluators

ANNEX 2 – ITINERARY

Date	ACTIVITIES	PARTICIPANTS	REMARKS
Sunday Nov.14	Arrival Belize City	Evaluation Team – Hildebrand and Putney Vega	Transfer to the hotel in Belize City To apartment in Belize City
Monday Nov.15	To Belmopan City Session I: Briefing UNDP Belize House BMP Administrative arrangements and working at the UNDP office. Session II: Meeting with members Board of Directors CZMA Session III: Interview Members of Advisory Council BMP to BZ	Session I: UNDP Personnel – Dylan Vernon, Diane Wade- Moore, Shaun Finnetty Acting Director, CZMI, Virginia Vasquez Evaluation Team Session II: Dr. Mike Tewes, CEO Ministry of Fisheries Patricia Mendoza, CEO Ministry of Natural Resources Elvis Requena, Economist Ministry of National Development James Azueta, George Myvett, And UNDP Session III: Osmany Salas, Chief Forest Officer	Transfer 7:30 am to 8:30 am Session I 9:00am – 12:30pm Session II: 2:00 pm – 4:30 pm Session III: 5:00 pm – 6:30 pm Transfer 6:30 pm – 7:30 pm
Tuesday Nov. 16	Depart for BMP Session I: Interview Member Advisory Council Session II: Interview Ministry Personnel with responsibility for CZMAI Session III: Member Board of Directors Session IV: UNDP/GEF Session V: Member BOD Session VI: Interview Project Staff - Director CZMI	Session I: Evadne Wade Garcia, Geology and Petroleum Department Session II: Hon. Mike Espat, Min of Fisheries, CEO Tewes, Min of Fisheries, Mr. Remigio Montejo Adviser to Ministry of Fisheries Session III: Nancy Namis, Ministry of National Development Session IV: Philip	Transfer 7:45 am to 8:45 am Session I: 9:00 am – 10:00am Session II: 10:00 am – 11:30 am Session III: 1:00 pm – 2:00 pm Session IV: 3:30 pm – 4:45 pm Session V: 4:00 pm- 4:40 pm Session VI: 4:45 – 6:30 pm Transfer 7:00 pm

	To Bz City	Balderamos, GEF Small Grants Coordinator Session V: Deon Pascascio, Board of Directors Ministry of Environment Session VI: Leandra Cho Ricketts, last Director CZMI	
Wednesday Nov. 17	Session I: Meeting with CZM Advisory Council Members Session II: Meeting with Funding Agency Session III: Meeting with Field Staff - Marine Protected Areas Managers Session IV: Interview Project Staff – CEO CZMA	Session I: CZMAI Advisory Council Metereological Dept. Ministry of National Development, Belize Tourism Board Session II: Marnix Perez, Acting Executive Director and Jose Perez, Projects Director, Protected Areas Conservation Trust (PACT) Session III: Friends of Nature for Laughing Bird and Gladden Spit; Fisheries for Caye Caulker, Bacalar Chico, South Water Caye and Sapodilla Cayes Session IV: last CEO CZMA Imani Morrison Fairweather	Session I: 9:30am12:00 pm Session II: 10:00 am Putney Vasquez to BMP 11:00 am – 12:00 pm Session III: 2:30 pm Session IV: 4:00 pm – 6:30 p.m.
Thursday Nov. 18	Session I: Interview Member Advisory Council and Project Staff CZMI Session II: Interview with the Cruise Tour Operator Session III: Advisory Council Member	Session I: Roberto Pott, Belize Audubon Society; Tanya Thompson past CZMI programme staff, Information Specialist Session II: David Gegg, Developer Session III: Janet Gibson, Wildlife Conservation Society	Session I: 8:30 – 10: 30 a.m. Session II: 10:00 am – 12:00 p.m. Session III: 1:30p.m – 3:00 pm
Friday	Southern Coastal	Observed and	Hotel Placencia

Nov. 19	Villages Visit to Hopkins, Seine Bight and Placencia Transportation (by car)	mingled in Garifuna celebrations and talked with villagers of coastal Communities	
Saturday Nov. 20	Interviews Placencia Visit to Southern Town Dangriga Interviews with members Coastal Advisory Committees Return to Belize City (by car) To Caye Caulker (by Water Taxi)	Interviews with Placencia Coastal Advisory Committee tourism and fisheries stakeholders	Hotel Caye Caulker
Sunday Nov. 21	Caye Caulker, Project's Pilot Village for Planning Guidelines To Belize City (by Water Taxi) Evaluation Team Analysis	Interviews with Caye Caulker Coastal Advisory Committee tourism and fishing industries' stakeholders	Working Hotel Belize City
Monday Nov. 22	Session I: CZMAI Office Interview with Project Programme Staff Session II: Interview Acting Director, CZMAI Session III: Interview Past Chairman of Board of Directors Session IV: Interview Past Chairman of the Board of Directors Session V: Discussions with UNDP Session VI: Team Leader Drafting Preliminary Report	Session I: Gina Young, CZMI Last Planning Officer Session II: Virginia Vasquez, Acting Director Session III: Hugh O'Brien, CEO Ministry of Agriculture and past member of BOD Session IV: Sergio Garcia, Adviser to Ministry of Agriculture and past member of BOD Session V: UNDP and Evaluation Team Session VI: Larry Hildebrand	Working at Belize City Hotel Session I: 8:30 am – 9:30 am Session II: 10:00 am – 10:00 pm Session III: 2:00 – 3:00pm Session IV: 3:00 - 4:00pm Session V: 4:10 pm to 5:00 pm
Tuesday Nov. 23	Session I: Interview Member Advisory Committee Session II: Interview Past Project Staff Session III: Putney and Vega input to draft of	Session I: Beverly Wade, Fisheries Administrator Session II: Vincent Gillet, First CEO of CZMAI Session IV:	Session I: 9:20 am to 10:15 am Session II: 10:20 am – 11:30 am Session III: 11:00 am – 1:00

	<p>preliminary report Session IV: Putney and Vega to BMP for Meeting (Hildebrand ill)</p> <p>Transfer to BMP Transfer to BZ</p>	<p>Presentation of report to UNDP, EU, Members Board of Directors</p> <p>Dr. Mike Tewes, CEO Ministry of Fisheries Mr. Remigio Montejo, Adviser to Ministry of Fisheries Ms. Virginia Vasquez, Acting Director CZMI Mr. Dylan Vernon, UNDP Mr. Julio Escalante, EU Mr. Shaun Finnetty, UNDP Ms. Diane Wade, UNDP</p>	<p>pm Session IV: 3:00 pm – 4:15 pm</p> <p>Hotel Belize City</p>
<p>Wednesday Nov. 24</p>	<p>Team Members return to their respective countries</p>		

Annex 3

PERSONS INTERVIEWED (43)

Honourable Michael Espat, Minister of Fisheries
Mr. Remigio Montejo, Adviser to Minister of Fisheries

Coastal Zone Management Authority Board of Directors

Dr. Mike Tewes, CEO Ministry of Fisheries,
Patricia Mendoza, CEO Ministry of Natural Resources
Nancy Namis, CEO Ministry of National Development
Elvis Requena, Ministry of National Development
James Azueta, MPA's Fisheries
George Myvett, Fisheries
Beverly Wade, Fisheries Administrator
Imani Morrison Fairweather, ex CEO 2002-2004 (now Director, Enviroplan Consultants)
Vincent Gillett, ex CEO 1999 - 2002

Acting Director

Virginia Vasquez

Past Board Members

Sergio Garcia ex Chairman BOD as CEO Ministry of Agriculture and Fisheries (now Adviser to Ministry of Agriculture)
Hugh O'Brien ex Chairman of the BOD as CEO Ministry of Agriculture and Fisheries (now CEO Ministry of Agriculture)
Deon Pascascio, ex CEO Ministry of Tourism and Environment (now Chairman Border Management Agency and independent consultant)
Dr. Leandra Cho-Ricketts ex Director of CZM Institute 2002-2004 (now independent consultant)

Coastal Zone Management Institute Advisory Council

Evadne Wade Garcia, Director, Geology and Petroleum Department (retired couple days after interview)
Elvis Requena, Ministry of National Development
Albert Jones, Meteorological Department
Raymond Mossiah, Belize Tourism Board
Roberto Pott, Belize Audubon Society
Janet Gibson, ex-Director of CZM Institute 1999 -2002

Marine Protected Areas Managers

Victor Alegria, Caye Caulker
Kenneth Gale, Sapodilla Cayes
Lindsay Garbutt, Laughing Bird Caye and Gladden Spit, (Friends of Nature)
Alicia Eck, Bacalar Chico
Nidia Ramirez, Southwater Caye

Coastal Advisory Committee Members

Marcial Alamina rep for Youths and Scouts (Carpenter and jeweler)
Wendy Auxillou rep for Caye Caulker Development/Parks Committee (Hotelier)
Dorothy Beveridge rep for CCBTIA (Bird Guide)
David Vernon rep for Chairman Friends of Nature (Tour Operator)
Brian Young rep for Placencia Tour Guide Association (Tour Operator)
Salvador Zabaneh ex rep for Independence Village Council (Hotel & Restaurant)

Past Programme Personnel

Tanya Thompson, ex Information Specialist (now BAS Public Awareness)
Gina Young, ex Coastal Planner (now Technical Officer Enviroplan Consultants)

Stakeholders

Alberto Villanueva, First Vice President BTIA and Chairman Caye Caulker Village Council
David Gegg, Tour Operator/developer
Gabriel Pariente, Fisherman
Eloy Badillo, Fisherman

Other

Osmany Salas, Chief Forest Officer
Philip Balderamos, GEF Small Grants Administrator
Marnix Perez, PACT Acting Executive Director
Jose Perez, PACT Project Director

UNDP

Dylan Vernon
Diane Wade-Moore
Shaun Finnetty
Claudette Hulse
Leif Pederson

Annex 4

Documents Reviewed

Project Document, Conservation and Sustainable Use of the Belize Barrier Reef Complex (BZE/98/G33/A/1G/99)

Belize Government, Coastal Zone Management Act Chapter 329 of 1998, revised edition 2000

Christie, R., Donna R., Elizabeth C and Clyde W. Atkinson.
Legislation, Policies and Regulations Relevant to Coastal Management in Belize: A Review and Proposals for Better Implementation of the Coastal Zone Management Act of 1998 by Professor at Law Florida State University College of Law

Coastal Zone Management Authority/Institute:
Minutes of Meetings – CZMA Board of Directors; CZMI Advisory Council, Tripartite Reviews,
Cayes Development Guidelines
Public Outreach/Public Awareness Materials and publications
Cayes Development – Best Practice
CZM Organizational Chart
CZM Staff List
CZMA/I Work plan to end Dec. 2004 and Budget 2005

Delaney, Richard F. and Maria Vega. Mid-term Independent Evaluation – Findings and Recommendations of the Project “Conservation and Sustainable Use of the Belize Barrier Reef Complex” (BZE/98/G33/A/1G/99) December 2002

Fairweather Morrison, Imani. Comments to Final Report for GEF Local Benefits in Belize August 2004

Fairweather Morrison, Imani. The Consideration of Socio-economic and Demographic Concerns in Fisheries and Coastal Area Management and Planning Belize Case Study August 2004

Fairweather Morrison, Imani
Revenue Sharing for the Network of Marine Protected Areas in Belize

Fairweather Morrison, Imani. Airport Departure Fee and Cruise Head Tax for Protected Areas Management Belize, July 2004

Fairweather Morrison, Imani. Summary – Operationalizing a Financing System for Coastal and Marine Resource Management in Belize, 2003

Finnetty, Shaun. Proceedings Report, Special Strategic Directions Meeting of CZMI Board of Directors, June 17, 2004

Haas, Drs. Glenn and Robert Aukerman Professors and Carlos Santos.

A Financial Strategy for Sustainable Tourism, Resources, and Management of the Coastal Zone of Belize, June 2001

Johnson, Minelva. Final Report Consultancy to Strengthen the Coastal Advisory and Marine Protected Areas Advisory Committees, May 30, 2002

Panayotou, Theodore, and Faris, Robert and Clifford, Jennifer. Coastal Zone Management in Belize: Institutional Development and Financing Mechanisms, October 1995

Ravndal, Virginia. Community Co-managed Park System for Belize, Final Project Evaluation (BZE/98/G32/A/1G/99), October 2002

The Halcrow Group. The National Integrated Coastal Zone Management Strategy for Belize. Prepared for CZMA/I

Soussan, John, Rachel Graham, and Stacey Noel. Final Report for GEF Local Benefits in Belize, August 2004

Vega, Maria. Recommendation for a Fee Collection System and Implementation Plan for Sport Fishing, Diving, and Snorkelling. Prepared for Coastal Zone Management Authority Institute Belize, April 2004

Vega, Maria. Integrated Coastal Zone Management Fees and Financing Framework Prepared for CZMAI, November 2003

Annex 5

CHRONOLOGY OF CZMAI INITIATIVES FOR FINANCIAL SUSTAINABILITY

PILOT PROJECT PHASE

1995

Panayotou, Theodore, and Faris, Robert and Clifford, Jennifer
Coastal Zone Management in Belize: Institutional Development and Financing
Mechanisms October 1995

INSTITUTION

1998 General Elections and Hurricane Mitch

Change in Belize Government
Passage of the Coastal Zone Management Act Chapter 329 revised edition 2000
which calls for the establishment of the CZMAI. This was a prerequisite for the
project funds in the following year.

PROJECT PHASE

1999

The Project was agreed upon including the requirements for implementation of
measures for financial sustainability. Specifically, it calls for introduction of sports
fishing and diving fees. The Project Document is entitled, Conservation and
Sustainable Use of the Belize Barrier Reef Complex (BZE/98/G33/A/1G/99)

2000 Hurricane Keith

CZMAI commissioned consultancy by Haas, Drs. Glenn and Robert Aukerman
Professors and Carlos Santos for CZMAI financial sustainability.

2001 Hurricane Iris

Haas, Drs. Glenn and Robert Aukerman Professors and Carlos Santos
The document entitled "A Financial Strategy for Sustainable Tourism, Resources,
and Management of the Coastal Zone of Belize" was completed in June 2001.
The report was broad sweeping but did not suggest how to operationalize any of
the systems proposed.

The CZMAI contracted group undertook national consultations to facilitate uptake
of the recommendations of the consultancy.

The tourism industry was reluctant to embrace on the basis that tourism growth
was new and had been affected by hurricanes.

The Prime Minister's Office also advised that the political climate (prior to
elections) was not suitable for levying fees.

Discussions of revenues sparked discussions on possibilities for amalgamating
CZMAI with the under-financed Fisheries Department. Workshops on the issue
were not positive as this recommendation lacked stakeholder support.

2002

February 2002: CEO CZMAI contract terminated and was not renewed.

June 2002: New CEO recruited

July 2002: Director resigns

CZMAI facilitated the consultancy funded by Summit Foundation to Programme for Belize which aimed at developing a national fee collection system for Marine Protected Areas, specifically. Kreg Lindberg and Marion Cayetano were the experts retained by PFB to undertake the initiatives. Staff Changes - CEO and Director Lobby efforts to Prime Minister, Cabinet and donor agencies

September 2002: New Director of CZMI recruited.

2003 General Elections and deteriorating economic conditions esp GOB

Change of Minister of Agriculture and Fisheries

March 2003: Change in Government, new Minister and CEO

May 2003: UNDP/Belize facilitated the assistance of Consultant Leida Mercado who identified immediate and medium term strategies (including the proposals for Goff's Caye which was viewed as a short term – quick fix measure).

May 2003: Televised Public forum during coastal awareness week to facilitate national discussions on the benefits from coastal resources management in terms of the costs of managing these resources.

June – August 2003: CZMAI held in-house discussions with tourism operators and fishers who use Goff's Caye area to pacify concerns that the management of the area would marginalize the fishers and result in excessive cost to the tourism partners.

August 2003: CZMAI retained Sarah Reynolds an intern to assist in gathering further information from the stakeholders reference CZMAI User Fees. Survey of stakeholders countrywide was conducted.

August 2004: Government re-shuffle, new Minister and CEO of Ministry of Fisheries;

September 2003: CEO and Director approach Andrew Bovarnick for more hands on assistance in detailing strategy for operationalizing the sustainability measures.

October 2003: CZMAI board of directors request a detailed strategy and cabinet paper to finalize decisions on the financing issues due to prodding by the UNDP representative on the Board of Directors (observer status)

November 2003

UNDP Mission team consisting of Pedersen, Leif, Andrew Bovarnick and Leida Mercado assist CEO and Director of CZMAI in the elaboration and communication of the plan. The document entitled "Financial Sustainability for

Management of the Belize Barrier Reef Systems prepared for CZMAI December 2003”

November 26 - 27, 2003 CZMAI convened a decision making workshop with all stakeholders to gain consensus on aspects of the financing strategy that the various industries were prepared to endorse.

November 2003 Toure, Mustafa
CZMAI retained consultant to outline a communications strategy for uptake of the recommendations.

November 2003 Vega, Maria
CZMAI retained consultant to assist in detailing how collection systems would work; document completed is “Integrated Coastal Zone Management Fees and Financing Framework” Prepared for CZMAI

December 10, 2004 Recommendations were communicated to Board of Directors for their uptake. Recommendations also presented to a special cabinet appointed tourism fees task force established in the said month. The Minister of Tourism had expressed concerns that charges to be levied by CZMAI, as well as, other national organizations were targeted to the tourism sector.

With discussions of fees came discussions on amalgamation of CZMAI with Fisheries Department. CEO of CZMAI and Director CZMAI called into several meetings in the month of December by the Minister to discuss a proposal produced by Fisheries Department which elaborated how the merger would be facilitated. CZMAI’s CEO and Director advised that the discussions should occur at the Board of Directors and Advisory Council levels instead. It never did.

2004 Rationalization Confusion; Hurricane Ivan Goff’s Caye Damage

January 2004: Change in CEO Ministry of Fisheries.

January 20, 2004 Cabinet decision RE: Financial Sustainability for the Belize Barrier Reef Complex. Decisions were:

- 1) Approval of the fee of BZ\$10 at all MPA’s nationwide
- 2) Approval of management of Goff’s Caye area instead of the wider management area advocated by the agency
- 3) Amalgamation of CZMAI and The Fisheries Department

February 18, 2004 Official communication of the above decision by the Board of Directors to CZMAI and industry stakeholders due to a decision of Cabinet to also change the CEO of Agriculture and Fisheries who chaired the Board of CZMAI

CEO and Director CZMAI submit a 3 year EU project to the Board of Directors for approval prior to submission to EU

February 20, 2004: CEO CZMAI gives three months notice of resignation due to displeasure with decisions to amalgamate agencies, tacit support for the agency by the board of directors and lack of support and guidance from the board on issues relating to the agency especially financial sustainability.

April 2004: The Chairman of CZMAI Board of Directors appoints a Working Group to provide guidance on the implementation of Cabinet decisions.

April 2004: CZMAI retained Maria Vega to recommend a Fee Collection System and Implementation Plan for Sport Fishing, Diving and Snorkelling as Cabinet said possibilities existed for their implementation at a later date.
Recommendation for a Fee Collection System and Implementation Plan for Sport fishing, Diving,

July 2004 Management Agreement signed between CZMAI and Ministry of Natural Resources for the Management of Goff's Caye.

July 2004: Director resigns from Agency.

August 2004: Tour Operators boycott the use of Goff's Caye and instead use areas just outside the region where there are no charges.

POST PROJECT

Agency unable to generate the revenue from Goff's Caye and must terminate several staff positions. Massive staff flight and departure.

Bare bones austerity budget; GOB and individual private sector grants;
Negotiations underway with individual private sector for commercial venture;
Some small offers of assistance from donor agencies;
PACT requires a clear vision from CZM prior to any assistance;

Annex 6

Non-government Contributions to the Project (1999 to 2004)

Private Sector Contributions	to Project 1999 to 2004 Sustainable Use of Belize Barrier Reef	Private Sector Persons in Attendance at meetings	Value BZ\$ BoD @ \$200 pp Others @ \$100 pp
		TOTAL	
Board of Directors	CZMAI Minutes file 2004 only Estimate 7X4 for previous years	7 + 28 = 35	7,000
Advisory Council	BTIA file copies since 1999	154	
Belize Barrier Reef Committee	BTIA file copies since 1999	100	
World Heritage Sites Sub- committee	BTIA file copies since 1999	116	
Caye Caulker Coastal Advisory Committee	CCBTIA file copies since 1999	110	
Turneffe Coastal Advisory Committee	Did not locate file but a few committees were inaugural and 2 validation Estimate	9	
Placencia Coastal Advisory Committee	Did not locate file but my impression is this community active	27	
Northern Coastal Advisory Committee	CZMAI file 2004	9	
Belize City Cayes Coastal Advisory Committee	Friends of Swallow Caye Files 2004 Memo	18	
Southern Coastal Advisory Committee	CZMAI file 2004	9	
Lighthouse Reef	Estimate	9	
Workshops	BTIA files	100	
Seminars/training	BTIA files	100	
Official Events	BTIA files	100	
Conference	BTIA files	5	
		901	86,600
Interviews –visiting experts, evaluations etc	Various sources	200	20,000
Homework – Analysis and preparation of documents for 200 meetings, etc.	Estimate 3 persons X 200	600	60,000
Travel 901 persons	¼ farthest distance \$600 x225 p ¼ mid distance \$60 x 225 p ¼ shortest distance \$15x 225 p ¼ no cost		135,000 13,500 3,375
Miscellaneous Expenses for serving private sector members	Office supplies, telephone, etc \$60 X 4 yrs X 100 persons		24,000
GRAND TOTAL			BZ \$349,475