



UNDP Tanzania

Government of Tanzania: Zanzibar

JOZANI-CHWAKA BAY CONSERVATION PROJECT

PHASE III (PIMS 1136)

PROJECT TERMINAL REVIEW: (19TH April - 3rd May 2003)

Final Version (November 2003)

Dawn Hartley (LTS International)
Hamza Rijali (Division of Environment, Zanzibar)

Foreword to the November Final Version of the Evaluation Report

This joint Terminal Evaluation (UNDP terminology) and Participatory Project Review (CARE-Austria terminology) was a joint process by the two major funding partners of this Jozani-Chwaka Bay Conservation Project. The successful end point of this evaluation review, despite initial methodological problems, testifies both to the strength of the implementation partnership and the skill and determination of the evaluation team.

The field evaluation of April – May 2003 ended with a presentation to the three main partners around the GEF Component: Government of Zanzibar, UNDP/UNDP-GEF and CARE Tanzania. This was followed by a detailed question and answer session, which allowed the preparation of a draft report. This in turn was circulated to partners for comment and review.

The process was then delayed somewhat, to see how the still ongoing “Local Benefits Study” of the GEF Secretariat in Washington DC, which had selected Jozani for an in depth field evaluation, could link to this review process. The Evaluator, Dr. Dawn Hartely was able to join the Benefit Study team, on Zanzibar, for a day in early October 2003 to discuss linkages.

The project held its final TriPartite Review in Zanzibar, on 18 November 2003; chaired by the Permanent Secretary for the Ministry responsible for forests. This TPR accepted the Terminal Evaluation Report. The TPR did point out that the project had progressed significantly since the field evaluation; and that:

- Jozani National Park declaration would be announced on January 12, 2004; on Zanzibar’s main public holiday.
- JECA had been strengthened by the secondment of a forest officer to provide support to this developing NGO.
- An exit strategy for the project and CARE involvement are in place.

Overall, it has been a great project!

W. A. Rodgers
UNDP – GEF Tanzania
19th November 2003

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List of Acronyms

DCCFF	Zanzibar Department of Commercial Crops, Fruits and Forestry
GEF	Global Environment Facility
GoA	Government of Austria
GoZ	Government of Zanzibar
IGA	Income Generating Activity
JCBCA	Jozani-Chwaka Bay Conservation Area
JCBCP	Jozani-Chwaka Bay Conservation Project
JECA	Jozani Environmental Conservation Association
JOSACA	Jozani Savings and Credit Association
LUMA	Land-use Management Agreement
M&E	Monitoring and Evaluation
NPAB	National Parks Area Board
NRM	Natural Resources Management
NCA	Nature Conservation Area
NGO	Non Governmental Organisation
PA	Protected Area
S&C	Savings and Credit
ToRs	Terms of Reference
UNDP	United Nations Development Programme
VCC	Village Conservation Committee
CBO	Community Based Organisation
KQI	Key Questions and Issues
MTR	Mid Term Review
CARE	An International NGO (The Implementing Partner)

Acknowledgements

Firstly, we would like to thank the Director of DCCFF, Dr Bakari Asaad Asseid, and the staff of the DCCFF together with the CARE Coordinator for Zanzibar, Mr Thabit Masoud, and the staff of CARE Tanzania for hosting the Review Team.

Special thanks go to the whole Implementation Team of Mr Is-hak Abdulwakil, Mr Sheha Idrissa Hamadan, Mr Saleh K. Khiari, Mr Isac Makonda, Mr Abubakar O. Masoud, Mr George Mkoma, Mrs Rahika Hamad Suleiman and Mrs Mwajuma Ussi who worked hard with a very good humour throughout. We are grateful to them for making a difficult task relatively easy by accommodating both the demanding, short-notice field schedule and an arduous set of workshops.

We would like to thank the people of the six villages of Kibuteni, Kitogani, Kizimkazi-Mkunguni, Nungwi, Pete, and Ukongoroni for their kindness in welcoming us into their villages, and to the staff of JECA for their excellent and stimulating contributions to the process. We wish them all well for the future.

We thank Peter Scheuch, CARE Österreich; Katrin Lervik, UNDP, Dar es Salaam and Alan Rodgers, GEF/ UNDP, Arusha for their contributions to the process. Particular thanks go to Peter who helped to work through a difficult first few days of rationalising the various objectives.

Lastly, it is rare to evaluate a project in which the planned outputs have been largely achieved and the Intermediate Goals essentially reached - it is unusual for Evaluators to be able to give a grade "A", but the JCBCP has achieved this. Zanzibar continues to experience a difficult transition into the modern world, but it is a unique place with a unique people and culture. We hope the communities of Jozani and the, DCCFF staff will continue to negotiate and renegotiate their relationship with the help of civil society, but in the interim the project has built a very credible institution in the new National Park with a very positive people-orientated approach. It was our privilege to be invited in to examine a part of this effort and we thank you all.

Dawn Hartley (LTS International) and Hamza Rijali (Division of Environment, Zanzibar)

Executive summary

- 1 This report is the final project review for Phase III of the Jozani-Chwaka Bay Conservation Project, which is an integrated conservation and development project that was established by the Zanzibar Department of Commercial Crops, Fruits and Forestry (DCCFF) and CARE Tanzania, in 1995. The Project objective is to conserve the unique biodiversity of the forest reserves and associated buffer zone known as the Jozani-Chwaka Bay Conservation Area while enhancing the livelihoods of the surrounding communities.
- 2 This report serves a dual-purpose of:
 - (i) Documenting a final review process, commissioned by GoA and CARE Austria, in which the focus was on a participatory process to promote stakeholder groups and project self-learning; and
 - (ii) Providing an external, end-of-project evaluation focusing on impact and lessons learned for the GEF/UNDP component.
- 3 Methodologically the review is not a classical evaluation. Project and stakeholder self-learning was prioritised in the interests of longer-term sustainability of the intervention. The external evaluation element was layered on top of this process.

This was achieved by following three step process comprising:

Stage 1: Facilitated discussions in which key stakeholders (the participating villages and implementing organisations) assessed project achievements and made recommendations for the post-project environment from their own perspectives;

Stage 2: The project implementers' assessed the project's effectiveness through a facilitated self-evaluation of the Intermediate Goals using the indicators defined in the project's logical framework.

Stage 3: A stakeholder-assessment of the project's impacts (social, economic, institutional and environmental) undertaken in a facilitated Multi-Stakeholder Workshop, which included presentation of the results from Stages 1 and 2 and discussions about the project's impact.

Using this methodology has resulted in a **Participatory Appraisal** focussed on the project's **Effectiveness, Impact and Sustainability**.
- 4 The GoA and CARE Austria have been supporting the project objectives since 1995 and in Phase III they focused on developing a sustainable institutional landscape and addressing the issues of people's livelihoods.
- 5 To complement this long-term support the JCBCP, the GEF component has provided support aimed at securing the long-term biodiversity conservation status of the area. This support builds on earlier GEF inputs to the GoZ and the DCCFF but not the project area specifically. In particular, the GEF has provided support the DCCFF to complete the process of National Park gazettelement for Jozani as well as promoting community involvement in the conservation and management of the Conservation Area. Progress towards realising these objectives was consequently a key issue for the GEF.
- 6 The project was found to be highly **Relevant**.

Firstly, the conservation of Jozani Forest, which is an area of global biodiversity significance and a conservation priority for the Government of Zanzibar, was identified as a key project objective.

Secondly, the project has addressed poverty and rural livelihoods through a strategy to link income generation to tourism, which has been a key sector for development in terms of Zanzibar's economic and financial planning since the 1990s.

Lastly, the project has operated by using a participatory approach and with the explicit objective of building a stronger civil society. This is consistent with the broader aims of achieving improved socio-political development for the Islands.

- 7 The Jozani model is highly dependent on a thriving tourist sector and whilst very appropriate to the Zanzibar situation it is not a model suitable for all forests of biodiversity significance.
- 8 Overall, the Phase III project has succeeded in making an impact on both objectives contained within its overarching goal (i.e. conservation and livelihoods objectives).

Equally, it has gone a long way to achieving the four intermediate goals of:

- Assisting the communities to manage their natural resources more effectively;
- Transforming the DCCFF into a successful and modern conservation organisation with a pro-people approach to resource management;
- Promoting environmentally friendly IGAs; and
- Establishing an effective local civil society partner, JECA, to support communities.

This is a good overall result and the project can be proud of its achievements.

- 9 In terms of the **Project Formulation** for Phase III, three major issues were raised by the evaluation process:
- The decision to expand the project beyond the original 8 Core Village to a wider group of villages making 17 in total;
 - The inclusion of Nungwi village, which is not part of the JCBCA, in that wider group; and
 - The central institutional role created for JECA.

The evaluators are of the opinion that, whilst it was not an error to expand the project outwards to the Wider Area Villages, this expansion was too rapid and the project would have done better to have undertaken a more modest geographical expansion. Nungwi village (and the site on Pemba, which was also associated for a period), however, should never have been included under this project but should have been the subject of a coordinated sister project (as is now the case for the Pemba project).

Undoubtedly creating the central role of JECA in the implementing partnership has been advantageous to the project's progress. This success, however, has been bought at a cost of failing to clarify the longer-term mandate and ensure financial sustainability of JECA. This is partly a consequence of project design.

- 10 Regarding **Monitoring & Evaluation**, overall the standard of monitoring is satisfactory and regular reporting appears to be of good quality, this is despite a top-heavy reporting schedule. It is recognised that the two main donors attempted to streamline their reporting processes, but this was not sufficient. Mechanisms need to be sought whereby donors can agree to use a single reporting format and eradicate this burden of multiple reports.

The project Mid-term Review, which was carried out as a detailed internal evaluation for multiple reasons. Had consequence of the internal review is that the recommendations emphasize project management and operational issues around outputs and outcomes rather addressing strategic questions.

Given the increasing importance of M&E, not only to promote more adaptive project and programme management, but as the foundation for sharing of lessons with a wider audience, adequate financing must be provided for M&E in the budgeting of projects and programmes at the start.

11 The project is participatory in its approach: both the project implementation partnership between CARE, DCCFF and JECA and the implementers' interactions with the communities demonstrated the positive and constructive working relationships. While village meetings clearly operate within the framework of cultural norms for Zanzibar, which has a strong patriarchal tradition, everyone has a right to speak and women participate on a fairly equal basis. Clearly the project has invested substantially in the training of project staff, communities in general and women in particular to create this positive working atmosphere.

12 In terms of **Effectiveness**, a driving force for the Phase III project was the opportunity to achieve National Park status for the Jozani forest. At the time of the Review the National Park status was almost completed. The official launch of the Park is expected in early 2004. Once this happens the project will have realised a major indicator of success.

From the poverty and livelihoods side, the JOSACA savings and credit scheme has been one of the most successful aspects of the Phase III implementation. It would be useful to both open up this opportunity to the remaining Wider Area Villages and to document the case-study for both national and international learning as an example of best practice.

13 In terms of **Impact**, the multi-stakeholder workshop provides an assessment of the project's impacts, which the evaluators felt was very fair overall. Positive impacts were recognised as having been generated in all four standard impact areas of **Economic, Environmental, Social and Institutional Impacts**.

Firstly, the economic and social impacts of the revenue retention scheme, the income generating activities and most significantly the JOSACA savings and credit scheme were acknowledged for their impact on the villages. The limitations are that benefits are insufficient to reach everyone.

Secondly, the environmental impact of the project should not be understated: the integrity of the forest and the protection of the endemics is attributable to the earlier project phases. These inputs have been consolidated through the Phase III project, and it now remains for the national park status to be confirmed. Establishing an operational revenue retention scheme should be recognised as a major achievement.

Lastly, the institutional impact of the project has been very positive and the legacy of the project with the donor funds in place is an institutional landscape that characterised by diversity and constructive working relationships. The challenge is now for the stakeholders to consolidate this landscape in the post project environment.

14 The loss of the external funding introduces an entirely new operational context raising the question of project **Sustainability**. Ultimately the sustainability of the intervention is dependent on the sustainability of the organisations within the institutional landscape, and only the permanent institutions have guaranteed longevity. Thus the DCCFF, the Sheha and the village, which is the unit of administration, are the only institutional elements guaranteed to persist. Both the villages and the DCCFF need to guard against new initiatives that might inadvertently damage the co-management arrangements they have established under the legislation.

- 15 As already indicated in point 9, JECA remains the most vulnerable of the institutional components in the institutional landscape. The individual communities are unlikely to be sufficiently strong to argue their individual cases with government and so protecting the integrity of an umbrella organisation for communities is an important factor at least in the immediate term. Whether this means JECA in its current form is not clear. JECA is an institutional product of the project and it has functioned as a service delivery agent for CARE Tanzania. It would, therefore, be advisable for the donors not to leave JECA to "sink or swim" at this stage although a strong case can also be made for adopting such a strategy. Instead it would be preferable if some form of backstopping support could be identified for a strictly limited period of 6-12 months, which could either enable JECA to mature as an independent local NGO or to adapt to the role of a CBO that represents the communities using community means.
- 16 CARE is an international NGO whose presence is temporary in this set-up. Consequently CARE must now begin to withdraw from direct implementation if the Jozani model is to mature further and properly embed into the social and institutional structures of Unguja. Critically important here is encouraging DCCFF to assume its full role and begin to operate within the actual financial budgets of its organisation without further project subsidies. This is despite the vagaries of the international tourist trade. The revenue sharing mechanism has what appears to be a sound conceptual basis and it is important that this is now fully tested.
- 17 **Recommendations:**
- The DCCFF and JECA begin to operate as defined in the exit strategy and modify the strategy as appropriate, in the light of this Review.
 - CARE reviews its position in the institutional landscape and takes steps to operate in a backstopping and trouble shooting capacity. This may necessitate a review of the proposed exit strategy.
 - DCCFF to review its internal capacity and address gaps that may be left by the withdrawal of CARE staff (e.g. social analysis skills).
 - JECA should clearly separate from the project (and specifically stop acting as a service provider for CARE). It should undertake and implements the outcome of institutional review to define its own vision and future role. It should seek financial and technical support for this change management process.
 - CARE and/or UNDP to JECA, if approached, to find additional small scale funding which is sufficient for both undertaking an institutional review and making the appropriate organisational transition. This transition should be rapid i.e. not more than 6-12 months.
 - DCCFF to set-up a regular monitoring programme with feedback sessions for Core Villages that can support their implementation of their resource plans. Also to agree with the Wider Area Villages on priorities for planning support in the event that this is not already taken care of by the exit strategy.
 - Completion of the gazettelement process for Jozani National Park as soon as possible with a National Park launch date of early 2004.
 - Plan an independently facilitated review of performance and function of the revenue retention scheme to be scheduled after a minimum of 2 full annual cycles.
 - Document and disseminate the JOSACA Savings and Credit case-study.

1. Introduction

This report is the final project review for Phase III of the Jozani-Chwaka Bay Conservation Project (JCBCP). The Project is an integrated conservation and development project, established by the Zanzibar Department of Commercial Crops, Fruits and Forestry (DCCFF)¹ and CARE Tanzania, in 1995. The original project objective was *to conserve the unique biodiversity of the forest reserves and associated buffer zone known as the Jozani-Chwaka Bay Conservation Area (JCBCA) while enhancing the livelihoods of the surrounding communities*. The Project has benefited from financial support from: the Government of Austria (GoA) and CARE Austria since its inception; the Global Environment Facility (GEF/ UNDP) during Phase III implementation; and the McKnight and Ford Foundations since 2000.

This report serves a dual purpose of:

- (i) Documenting a final review process, commissioned by GoA and CARE Austria, in which the focus was on a participatory process to promote stakeholder groups and project self-learning; and
- (ii) Providing an external, end-of-project evaluation for the GEF/UNDP component.

Methodology

It is important to recognise that these two purposes are quite distinct and, therefore, they required different methodological approaches. They are not mutually exclusive however, but achieving both objectives required substantial discussion and some compromise between the different donor objectives. Undertaking the dual purpose required the evaluation team to "wear two hats" by acting as the facilitators for a stakeholder-owned process as well as external evaluators for the evaluation element. Given the short-time frame for the review (see Annex 2) this resulted in changes to the original methodology outlined in the Terms of Reference presented in Annex 1. The full methodology used together with the rationale for its use is presented in Annex 3, but a brief overview is outlined here.

Realising objective (i), the project and stakeholder self-learning, was prioritised in the interests of longer-term sustainability of the intervention and the external evaluation was layered on top of this process. This was achieved by following the process set out below:

Stage 1: Facilitating discussions for key stakeholders to assess the project from their own perspective. Participating villages from a sample of six villages and implementing organisations² to assess project achievements and to make recommendations for the post-project environment from their own perspectives (Annexes 5-13);

Stage 2: Project implementers' assessment (undertaken by all three implementing organisations) of the project's effectiveness through facilitation of a self-evaluation of achievement of the Intermediate Goals using the indicators defined in the project logical framework (Annex 14).

Stage 3: Facilitating a self-assessment of the project's impacts (social, economic, institutional and environmental), in a multi-stakeholder forum, which included representatives of all villages together with the project implementing organisations

¹ Formerly the Commission for Natural Resources

² During Phase III there have been 3 implementing partners, the DCCFF, CARE Tanzania and the Jozani Environmental Conservation Association (JECA), which is an association representing the Jozani communities that was created by the Project

following presentation of the results from Stages 1 and 2 and discussions about the project's impact (Annex 15).

These 3 stages of self-evaluation represent a stand-alone assessment of the Project by its stakeholders and provided a rich source of information for the evaluators to make an independent assessment for external evaluation.

Nevertheless, we should recognise from the outset that this report does not constitute a classical evaluation; rather it is an assessment which aims to achieve the overall objectives highlighted in the ToRs (Annex 1). Importantly, both the report's strong points and its weaknesses are the direct consequence of the methodology used. The methodology prioritised the primary objective of self-evaluation but this focus coupled with the time constraints placed on the exercise overall meant that compromises were made. The evaluation team consequently directed the process by placing greater emphasis on evaluating the higher levels of the logical framework and focusing the external evaluation component on assessment of the specified overall objectives of:

- Project impact;
- Sustainability;
- Lessons learned and examples of best practice; and
- Recommendations for the post-project environment.

The outcome is that some aspects of an evaluation, such as efficiency³ and achievement of individual project outputs and sub-outputs have not been considered. Effectiveness⁴ is considered through the assessment of the degree to which the Intermediate Goal (purpose level) indicators have been achieved. Lastly, the evaluators' comments on the issues of relevance and project formulation and design are more limited than they would be in a more classical Final Evaluation.

Profile of the Review Team

The final review was undertaken by:

- Dr Dawn Hartley, an international consultant and Team Leader (LTS International)
- Mr Hamza Rijali, a local consultant and facilitator for Stages 2 and 3 (Division of Environment, Zanzibar)

The Evaluation Team was assisted by the an Implementation Team consisting of project staff who facilitated the various Stage 1 inputs:

- Mr Is-hak Abdulwakil
- Mr Sheha Idrissa Hamadan
- Mr Saleh K. Khiari
- Mr Isac Makonda
- Mr Abubakar O. Masoud
- Mr George Mkoma

Various observers attended different parts of the process and they are listed in the participants' lists for the individual sessions to which they contributed. Mr Thabit Masoud, CARE Tanzania - Zanzibar Area Coordinator was present in an observer capacity throughout the entire process.

³ Which in UNDP terminology relates to financial planning and cost effectiveness

⁴ Or the measure of the extent to which the activities have attained the projects objectives

Structure of the Report

The report is laid out according to the format provided in the ToRs. Thus, following this introduction to the review (Section 1) the project and its development context is described (Section 2) before the findings and conclusions of the review are presented (Section 3). Due to the unusual nature of this review the stakeholders' own findings and conclusions are presented in full in the Annexes with summaries presented in tables and text boxes in Section 3. This form of presentation aims to separate the stakeholders' own findings from those of the evaluators. Lessons learned and examples of best practice are discussed in Section 4 while Section 5 presents the recommendations of the evaluators.

2. The project and its development context

Background to Phase III of the Project

The JCBCP began in 1995 and it is now coming to the end of Phase III of its implementation. The driving force to create the project was the need to address the problems of forest degradation and declining wildlife populations in the JCBCA while also recognising the need to improve local livelihoods. The successes of Phase I (Box 1) resulted in the development of Phase II in which the emphasis of the Project shifted to reflect the increased concern to tackle the livelihood security issues (Box 2). It is against this backdrop that the GEF developed a medium sized project to enhance the biodiversity conservation component specifically. Phase III implementation, including the GEF component, began in 2000 and it is due to finish in June 2003.

Box 1 Phase I Implementation: 1995 - 1997

Long term Objective: The sustainable long-term conservation of the biodiversity of Zanzibar Islands, in particular the last remaining groundwater forest zones and connected fauna, to improve the long-term living conditions of the population of Unguja Island.

Project Goals:

- 1) Assist the Zanzibari Government in creation, development and management of Jozania Forest and Chwaka Bay Mangroves NCA;
- 2) Improve the local economy and living conditions through eco-tourism activities and through advice in sensible use of those zones of the NCA which are dedicated for sustainable use by local communities; and
- 3) Create awareness of the importance of protecting natural resource through extension, training and conservation education "on-site".

Achievements:

- Established project partnership between CARE Tanzania and Commission Natural Resources, Zanzibar (now DCCFF);
- Increased capacity of Commission staff;
- Secured retention of 30% Jozani revenue for running the PA;
- Approved proposal and management plan for upgrading of Jozani Forest Reserve to a national park;
- Modest improvement to local economy through developing ecotourism (20% tourists to Zanzibar were visiting the JCBCA by end of Phase I with the boardwalk, opened in 1997, raising US\$10,000 for Pete);
- Secured agreement of Cabinet of GoZ over retaining a further 50% revenue for community development fund;
- Reduced conflict and built trust in 8 Core Villages - established active conservation committees and hunters' associations;
- Established representative community structure for JCBCA that developed a constitution eventually becoming a local NGO, the JECA;
- Improved basic tourist infrastructure and development of a visitor centre.

Key Issues and the Projects Intervention Logic

Considerable progress was made towards establishing an enabling policy and institutional framework to support conservation on Zanzibar during the mid-1990s⁵. Importantly, new policies and legislations⁶ that allow for the establishment of National Parks and community-based approaches to forest conservation were promulgated and endorsed in 1996. The GEF component of the Project has been especially concerned to support the DCCFF in their efforts to complete the process of National Park gazettement for Jozani and to promote community involvement in the conservation and management of the JCBCA. Progress towards realising these objectives is consequently a key issue.

Box 2 Phase II Implementation: 1998 - 2000

Long term Objective: The livelihood security of communities adjacent to Zanzibar's protected areas is enhanced

Project Goals:

- 1) The livelihood security of communities adjacent to Jozani-Chwaka Bay Conservation Project is enhanced.
- 2) Degradation of natural resources and biodiversity on the Jozani-Chwaka Bay area is reduced

Achievements:

- Phase II built on the progress made in Phase I;
- Notably, increasing numbers of visitors to the area were recorded and tourism revenues increased indicating the long term potential for sustainable tourism;
- The Jozani Environmental Conservation Association (JECA) developed out of the Jozani-Chwaka Bay Advisory Committee and was registered as an NGO in June 1999;
- A savings and credit scheme was tested

To complement the inputs directed at achieving biodiversity conservation, the GoA and CARE Austria supported objectives focused on developing a sustainable institutional landscape and addressing the issues of people's livelihoods. Therefore, other key issues focus on the sustainability of the institutional landscape developed and the degree to which livelihoods have been enhanced and benefits derived from the intervention.

As part of the development of Phase III the project expanded from working with the original 8 Core Villages to include nine new sites. Seven of those sites constitute the wider area of the JCBCA, but one was on Pemba and a second was at Nungwi in the North of Unguja Island. In both of these cases the link was to expand not the geographical area of the project but rather the methodological approach of the project on the basis that it would conserve other significant forest resources under pressure from unsustainable fuelwood utilisation. By the time of the final evaluation, the Ngezi community on Pemba had become the focus of a separate project development process

⁵ This progress was achieved largely through the implementation of two initiatives: the Institutional Support for the Protection of Biodiversity in East Africa (1992-1996) (GEF) and the Zanzibar Integrated Lands and Environment Management Project (Government of Finland).

⁶ The Environmental management For Sustainable Development Act, 1996. Part 1 to the Zanzibar Government Gazette Vol CVI No 5743 of 31st May 1997. The Forest Resources Management and Conservation Act No 10 of 1996. Part 1 to Zanzibar Government Gazette Vol. No. 5769 of 6th December, 1997

and so they were not considered during the evaluation, but Nungwi was specifically included in the sample because it was an oddity.

Phase III redefined the **Project Final Goal** as:

"The income and environmental security of 5,000 households in Jozani-Chwaka Bay Conservation area is enhanced, while biodiversity flourishes"

Four Intermediate Goals were identified:

Intermediate Goal 1: *Communities around the Jozani-Chwaka Bay Conservation Area manage natural resources effectively.*

Intermediate Goal 2: *The Zanzibar Department for Commercial Crops, Fruits and Forestry implements enabling policies and provides adequate support to communities for effective community-based natural resources management.*

Intermediate Goal 3: *Communities around Jozani-Chwaka Bay Conservation Area develop and implement environmentally friendly on-farm and off-farm income generating activities (IGAs)*

Intermediate Goal 4: *JECA effectively supports communities to manage natural resources and income generating activities.*

The focus of the final evaluation is the degree to which the Intermediate Goals have been achieved together with the impact of the intervention both locally and on Zanzibar.

The Relevance of Phase III of the Project

The conservation of Jozani Forest is identified as a priority for the Government of Zanzibar: Jozani is listed as the most important site for conservation in the Zanzibar Biodiversity Strategy and it is an area of global significance, thus, the conservation objectives of the project are highly relevant for Zanzibar.

Zanzibar has benefited economically from the growth of the tourist trade during the 1990s, however, the country has simultaneously been affected by a decline in other aspects of its economy, principally trade in agricultural products. The overall situation is that for many of the rural population their livelihoods have become increasingly difficult. Seeking to improve livelihoods is, therefore, highly relevant especially through connections to further development of the tourism sector.

Lastly, human rights and facilitating popular participation in political processes are key issues for Zanzibar's development. By working with rural communities to develop greater awareness and understanding of democratic processes while supporting communities to work more effectively at the local level, the project, through natural resource management, has been building civil society capacity. The increased awareness and capacity is transferable and it has application to all aspects of governance and political relationships in the Islands. For a project with its roots firmly embedded in conservation the Phase III intervention logic adequately reflects other significant broader concerns of Zanzibar's development.

3. Findings & Conclusions

Findings of the Communities

More achievements were reported for the core group of villages and where there are active savings and credit (S&C) schemes or compensation schemes in place e.g. Pete and Kitogani (Table 1). Increased access to credit and more income flowing through households, either through the development of businesses or as the result of compensation from the JCBCA, is clearly one of the most important factors for engendering support for the PA.

The villages with the least achievements to report were Nungwi, which should be recognised as a special case in that it is not associated with the JCBCA and Kizimkazi-Mkunguni, which belongs to the wider group. We should note that Kizimkazi-Mkunguni is more remote than the other Wider Area Villages in the sample. Overall, Kizimkazi-Mkunguni and Nungwi have received less input than other villages in this sample.

Achievements fall into two broad categories. Achievements related to:

- i) The development of community forest management plans and associated natural resource issues; and
- ii) Livelihood improvements, which may have been attained through agricultural developments, diversification of businesses, or improved social amenities.

Significant recommendations for changes in the future include: increased emphasis on issues relating to household economics such as: income generation and agricultural inputs; ensuring the implementation of plans developed during Phase III; the expansion of the S & C scheme to new villages; and further improvements to (or follow-up on) the development of existing schemes. Villagers were also asking the Government to meet its obligations to social development in their communities and for future training inputs to be targeted to a broader audience than the VCCs.

Findings of the Implementers

Self Evaluation

The implementing organisations all reported significant achievements resulting from the project (Table 2). The DCCF emphasised progress towards achieving national park status for the JCBCA together with improved management that included realisation of the retention scheme. They also recognised the input to their own organisational capacity as well as that of the communities, the latter through the establishment of the VCCs. JECA placed greater emphasis on aspects of community development and livelihoods improvements and their own role in achieving these developments. CARE staff gave a balanced overall view of project achievements, recognising both the conservation and development achievements and highlighting the importance of the partnerships developed through the project implementation arrangements.

In terms of doing things differently in the future the comments were wide ranging. There are associations with organisational interests evident and each institution's status in the institutional landscape.

Table 1 Major achievements and some recommendations reported by villages in the self-evaluation meetings - see also Annexes 5-10

VILLAGE	CHARACTERISTICS	ACHIEVEMENTS	RECOMMENDATIONS FOR FUTURE
KIBUTENI	Wider group village with a positive attitude to project	Used funds for social development in village (medicines, classrooms)	Need for a survey to be conducted to understand socio-economic baseline.
		Ader's duiker population increase	Government not the investor should be responsible for Ader's duiker conservation
		Honey production and income increased	Greater emphasis on IGAs required
		Introduction fines and fees (hunting) associated NRM	More involvement with community rather than forest is required
		Employment	Project to provide equipment and tools to the VCC
KITOGANI	Core village with a successful savings and credit scheme, Herbalists resident	Used community development fund for village developments e.g. nursery school	Modifications to JOSACA e.g. repayment time should be six months, S&C groups could be smaller, more shares and interest should be reduced
		Diversified work opportunities (trainers, petty business)	Establish mechanism for compensating farmers for Colobus damage further away from Jozani - including Kitogani. Compensations should be fixed amount per month not a percentage
		Individual livelihoods improved (e.g. able to marry, purchase farm plots, own modern bee hives)	Equipment: JECA motorbikes should stay in village not be used at the JECA office. VCC access to vehicle for transport of confiscated forest products
		Conserve natural resources - Reduced intensity of forest cutting	Beekeepers to be provided with modern equipment and an office for beekeeping association

VILLAGE	CHARACTERISTICS	ACHIEVEMENTS	RECOMMENDATIONS FOR FUTURE
KIZIMKAZI MKUNGUNI	Village in wider group, selected because it is regarded as difficult to work with by the implementers	Community forest management plan prepared: closure of key areas; designation of use zone and restrictions on hunting	Plans should be implemented
			Need for IGAs and S&C scheme to be established
			Need for improved agriculture inputs e.g. pest and vermin control
NUNGWI:	Wider Village added to project because of fuelwood concerns; but critical land conflict issues linked to booming local economy and tourism issues, considered difficult to work with	Community acquired knowledge on forest conservation and coral reefs. A few farmers have planted forest plants in their fields.	DCCFF to provide regular advisory and support services
		Successful tree nursery group	Train neighbouring villages in the same way because they have few NR compared with Nungwi
		Reduction in crop-pests	Conflict resolution between villages to be prioritised Training for the whole community not just the VCC. VCC and community to participate and be fully involved in the planning and implementation of activities.
PETE	Core village, major beneficiary of revenue sharing. Considered an easy village to work with now	Diverse businesses (forest resource based, agricultural and petty business) established (groups and individuals)	More improved agriculture inputs including livestock
		Evidence of livelihoods improved. Indicators: education, food security and clothing.	Tourism project developed for Machaga Cave

VILLAGE	CHARACTERISTICS	ACHIEVEMENTS	RECOMMENDATIONS FOR FUTURE
PETE (continued)		Improvement in women's livelihoods	More research and monitoring needed to further improve conservation
		Village more developed: clean water, schools, electricity and mosque	Government to assist village more pit-latrines and complete water project
		NRMP under implementation – improved conservation of resources	Facilitate increased understanding of wise use and allocation of land through NRMP
		S&C scheme operational	Improve S&C scheme and disseminate
		Improved relationships – strong village leadership and improved relations DCCFF	Maintain positive developments in relationships
UKONGORONI	Core village but considered more difficult to work with as little attitudinal change since start of Phase I; resident herbalists	Ader's Duiker conservation scheme that resulted in increase in duiker population and social benefits for village	Training should be given to whole community not concentrated on VCC and leaders
		Improvement in the quality of the forest through development and implementation of land-use management agreement	VCC should be allowed to collect revenue for the resources uses directly - currently revenues are collected by the district
		Operational S&C scheme and income generating activities	Loan repayment period needs to be longer because a 3-month cycle is too short for agricultural activities. Also desire for bigger loans
		Beekeeping association formed - increase in quality control has increased the value of honey	Need to establish a market where tourists can buy honey and beeswax products

DCCFF highlighted need for:

- Improved coordination;
- Better advocacy in relation to politicians; local authorities and civil society;
- Consultancy arrangements and direction of more short term work to partners;
- Remuneration to farmers for time spent in meetings;
- Review of training arrangements; and
- Improved marketing and IGAs

JECA highlighted need for:

- Revenue allocations to be undertaken in public forums;
- Increase in repayment period of JOSACA loans;
- More training for community members with potential;
- Further capacity building for JECA;
- Resource inventories to be completed before communities begin managing resources;
- Lobbying for new energy policy targeted on alternative energy sources; and
- Setting indicators for JECA goal achievements differently.

CARE highlighted need for:

- CARE to move out of the direct provision of services with future service delivery through Community Contact Persons;
- Loans given to non-savings and credit groups to be converted to S&C schemes; and
- Focus on the poor to be increased.

The issue of CARE withdrawing from direct implementation and handling over all responsibilities to DCCFF and JECA was also discussed in the CARE-staff session, but subsequently the issue was not presented in the multi-stakeholder workshop. Lastly, all three groups identified lessons learned through project implementation (Annexes 11-13) and these are discussed in section 4.

Logical-framework Assessment

Project performance at effectiveness level was assessed using the indicators defined in the logical framework (See Annex 14). Scores for achievement of the four Intermediate Goals lie between partially achieved and almost achieved (see summary Table 3). Key factors were identified as:

Intermediate Goal 1: Location of village (i.e. within core area or wider area) is a significant factor in determining whether a community manages its natural resources effectively.

Intermediate Goal 2: The Zanzibar DCCFF has succeeded in developing new enabling policy and providing support to communities, but there is a shortfall in the degree to which communities are participating in decision-making processes.

Intermediate Goal 3: Communities are actively involved in income generation and the S&C schemes have proved particularly successful, but targets were revised down at the MTR and these targets have not quite been reached..

Table 2 Achievements recognised by Implementing Organisations

Achievement Area	CARE	DCCFF	JECA
Conservation of Jozani	Raised awareness of the links between conservation and development	Reduced pressure on illegal woodcutting	Communities motivated for conservation
	Reduced hostility between communities and the monkeys	Reduced dependency on forest	
	Successful advocacy towards recognition for Jozani to be a NP	Establishment of National Park almost complete. Infrastructure developed. Increased tourism revenue	
		Approved wildlife bylaws and endorsed resource use agreements	
Capacity Building JECA	Capacity built		Successful supervision of development projects
			Successful management of community development funds for the Shehias
Capacity Building DCCFF	Capacity built and general support for DCCFF	Improved capacity of DCCFF	
	Support for DCCFF to establish and implement revenue retention scheme		
Capacity Building Communities	Community empowerment and capacity built	VCCs empowered	Facilitation of development of VCCs. Also capacity developed through training
	Training in business and marketing skills		Capacity of community members developed
Revenue Retention	Successful advocacy	Secured the retention scheme for sustainable management and community development	

Achievement Area	CARE	DCCFF	JECA
Livelihoods	Successful S&C scheme	HIV mainstreaming	Employment created
	Alternative Income Generation activities in forest adjacent communities		Alternative Income Generating Activities
			S&C credit scheme established and operating - leading to prosperity
Partnership	Successful and respectful partnerships established		Unification of 9 Shehias for common goal of conservation

Table 3. Summary of log-frame assessment of the overall achievement of intermediate goals together with the rationale for the score assigned. [Where 0 = No achievement; 1 = Little achieved; 2 = Partially achieved; 3 Almost achieved and 4 = Completely achieved]

INTERMEDIATE GOAL	SCORE	ASSESSMENT
IG1 Communities around JCBCA manage natural resources effectively	Core Area 3	Communities adhere to developed plans, but there are some issues outside of the Project's control that still need to be addressed e.g. Gazette of LUMAs, which are still on Government Press
	Wider Area 2	Negotiation process with communities is completed, draft LUMA document in place
IG2 The Zanzibar DCCFF implements enabling policies and provides adequate support to communities for effective CBNRM	3	<p>Money has been distributed to the community accordingly</p> <p>Community is involved in NR management and utilisation</p> <p>There are regular tripartite meetings between JECA, CARE and DCCFF</p> <p>Community is involved in designing, planning, implementing, and reporting</p>
IG3 Communities around JCBCA develop and implement environmentally friendly on-farm income generating activities	3	<p>The community performs a wide range of IGAs. Approximately 1700 people involved</p> <p>Savings and Credit presently reaches 41% target population (Revised Target 2500)</p> <p>Good quality products and services produced by community</p> <p>Some spread of IGAs and Savings and Credit to the wider community – the original target was the Core Villages only</p>
IG4 JECA effectively supports communities to manage NR and IGAs	2	<p>JECA essentially succeeded in supporting the communities to manage NRs and IGAs and about two thirds of people recognise JECA</p> <p>But following the indicators defined in the log-framework affected this assessment directly because:</p> <p>JECA did not work with households and one indicator is based on households</p> <p>JECA's role in the NRM planning changed but this change was not reflected by a change in the relevant indicator.</p>

Intermediate Goal 4: JECA was widely recognised as having made substantial progress in terms of institutional development, and it is highly effective at working with the communities. However, JECA's role had evolved during the course of the Phase III and the relevant changes had not been reflected in the log-frame indicators. Consequently, JECA's performance when assessed according to the indicators is less impressive. This apparent contradiction caused much debate.

Multi-stakeholder Workshop Evaluation of Project Impacts

Stakeholder representatives (from the villages participating in the evaluation and the implementing organisations) were divided into two groups and, in the light of the self-evaluations and the log-frame assessment, the groups were asked to assess the project's impact using the standard categories of economic, environmental, social and institutional impacts (see Annex 14 for details).

The assessment and key points made by the workshop groups are summarised in Table 4: the two groups concurred on the economic, environmental and social assessments, which were considered positive. Only one group assessed the level of institutional impact because of the time factors involved in the workshop, but overall institutional impact was perceived as very positive because:

- New institutions have been built and developed;
- Relations within and between communities have improved; and
- Capacity has been developed in several of the villages thereby improving village governance. This increase in capacity is directly attributed to working with the project.

This was recognised as a very good overall result for the project.

Findings of the Evaluators

Project Formulation

Phase III is a continuation of the earlier project phases and consequently the main aspects of this project's formulation were pre-determined. The major issues raised by the evaluation process in relation to the design of this project are:

- The decision to expand the project to the wider group of villages;
- The inclusion of Nungwi village, which is not part of the JCBCA, in the wider group; and
- The central institutional role created for JECA.

Undoubtedly the project is very successful overall so the basic premise on which the original project was started has proved sound. However, it should be noted that the success of the initiative is heavily dependent on the economic context created by the development of tourism on Zanzibar. The Jozani model is effective within this specific development scenario, but it is not a model of participatory forest management that can be universally applied. As long as Zanzibar has a thriving tourist trade, however, the Jozani model is sustainable. Significantly, positive outcomes are evident in terms of both conservation and livelihoods in Jozani: the PA is now secured and its conservation status is vastly improved in comparison with the pre-intervention scenario while the positive impact on local livelihoods is clearly visible.

Table 4. Summary showing Multi-stakeholder Workshop assessment of Project Impacts and comments

Impact Area	Score	Reasons	Additional Comments
Economic	+	IGAs have had economic impact, but resources not sufficient to reach all communities and poor do not benefit	Target area for IGAs was increased to include wider area - effect was reduction in impact in core area. Still need greater application of JOSACA to wider area
Environmental	+	Improved understanding of conservation among communities; JCBCA is to be established as a national park and conservation status of rare species improved; but management agreements, despite endorsement, are largely waiting to be implemented	Utilisation aspects of natural resources need further emphasis Transparency in stakeholder dealings - and need to abide by established norms for conservation and revenue retention from JCBCA
Social	+	Positive changes in behaviour. Good relations established with DCCFF and with other communities.	Project time frame too short More training needed on how communities can work together effectively
Institutional	++	New institutions created, cooperation with old institutions (Sheha) is good and capacity developed has been developed	VCCs have confidence to run their affairs JECA has played a significant role in realising achievements

On the decision to expand the project into the wider JCBCA⁷, conceptually the expansion makes sense. However, in the Core Villages the benefits derived from construction of the boardwalk and the operation of the revenue retention scheme had a substantial impact, thereby facilitating aspects of the resource management planning that would otherwise have been less popular (e.g. any reduced access to resources or increased inconvenience from the wildlife). Moreover, that planning has taken place over an eight-year period and the link between the benefits and conservation effort is now well established in villages like Pete (a major beneficiary) where the farmers are compensated directly for living alongside the monkeys. This is not the case for the Wider Area Villages, where project inputs have been of shorter duration and generally of a lesser intensity because project resources are spread more thinly. Significantly, the benefits from the revenue retention scheme are less once the element of direct compensation for farmers is removed from the package. This appears to have left the Wider Area Villages somewhat dissatisfied, but with raised expectations.

⁷ The evaluators understand this decision was a CARE Austria and Project decision not a UNDP-GEF decision.

Essentially, establishing a successful working relationship in the Wider Area Villages has been dependent on the intrinsic value of natural resource management being evident to the communities. The exception has been where the S&C scheme has been initiated for it is seen as very positive. In the light of this outcome a more modest expansion would probably have been more sustainable in the post-project environment.

The inclusion of Nungwi village was a clear design mistake because:

- The area was not associated with the JCBCA;
- Inputs at this site have been at a direct cost to the JCBCA; and
- There appears to be negligible impact from inputs at Nungwi.

Whilst it is not wrong for the project to have explored applying the project approach more widely, given the difficult land context that exists at Nungwi⁸ and the severity of the fuelwood shortages, a tailored intervention with substantial input was required. Tacking the complex problems of Nungwi onto the JCBCP has clearly proved insufficient to address the issues there.

So overall the project has had limited success with the geographical expansion, which requires more time and input, and negligible success with the methodological enlargement of the project. There is no reason, however, to question the methodological approach itself, rather the latter would have been more likely to succeed as an independent sister project related to the JCBCP by a strong programmatic link. CARE Austria has now taken this initiative to address similar issues on Pemba that, like Nungwi, were for a period also added onto the JCBCP!

It would not be right to criticise the project design for the dedication of resources to building the capacity of a local institution established to represent and empower the communities. On the contrary strengthening civil society in the context of, firstly, the project's objectives and, secondly, Zanzibari development concerns is extremely important. Moreover JECA, as well as being a product of the project, has been a key contributor to the project's successes. However, there remain unresolved institutional sustainability problems for this organisation: the actual role JECA fulfils is unclear in organisational terms and questions remain unanswered regarding JECA's future in the post-project environment. These issues are discussed in detail below. However, we should recognise that deficiencies and problems are not attributable to the fundamental idea of establishing a civil society institution to support participatory forest management, rather they related to the implementation of that idea.

Monitoring & Evaluation

The particular nature of the Review meant that the Project approach to M&E was not scrutinised in detail. However, the evaluators were provided with the logical framework, the M&E plan, UNDP/GEF Project Implementation Reports for 2002 and the completed Mid-term Review. A project baseline was not available to the Review Team for Phase III - although we understand one exists - but a direct comparison between the beginning and end is not possible in the context of this evaluation

⁸ Nungwi on the North coast of Unguja Island is a desirable beach destination for tourists. Consequently, this former remote fishing village now experiences fierce competition for land. The legislative context in Zanzibar is one where trees and crops are owned by people but the State owns the land in the national interest, so developers require planning permission but do not usually purchase land. In Nungwi the community and individuals consider themselves as "owning" the land and there is a local land tenure system in operation, which probably predates the ascent of the Revolutionary Government. There is a robust trade in land and setting aside community land for forestry is perceived as a low priority.

anyway. Nevertheless certain key indicators (e.g. population estimates of Ader's duiker and Colobus monkeys) have been the subjects of a regular monitoring programme throughout enabling reliable estimates of their population status to be made.

Overall the standard of monitoring seen was satisfactory and regular reporting appears to have been of good quality, this is despite a top-heavy reporting schedule because of the number of different donors involved. JCBCP has received funds from four different donors during the implementation of Phase III, separate quarterly reports were required for UNDP/GEF and CARE with additional specific reports required for the McKnight Foundation (Mid-Term and Final Reports) and Government of Austria (Bi-annual and Final). Much was done with the assistance of the donors to streamline the information required, nevertheless the need to format the information in different ways meant reporting requirements remained high. An agreement at the start for the format of one of the principle donors to be used for both donors would have been helpful to reduce this burden.

The Mid-term Review (MTR) was, somewhat unusually, carried out as an internal evaluation. It focuses on measuring the indicators at output level and paid less attention to the project assumptions, which should generally be a focus of a MTR. Consequently the recommendations emphasize project management and operational issues rather addressing strategic questions. It appears that this approach to the MTR was the result of several factors: firstly, the project had a slow start due to the prevailing political situation in Zanzibar following the 2000 general elections and this had an impact on the start of some activities and consequences for the timing for the MTR. Secondly, the project had experienced a number of other external reviews during 2001 and 2002 and the decision was partly a response to reducing pressure from further visitors. While the decision is understandable, it is nevertheless unfortunate because had experienced external consultants been used to conduct the MTR the project's failure to revise the indicators for IG4, "JECA effectively supports communities", should not have happened.

Project-staff typically think in terms of the project outputs because these are the components of a project that they are directly responsible for delivering. Importantly, progress towards meeting the outputs is the aspect of implementation most closely monitored for project work-planning purposes. However, because of the emphasis on output project staff can find it difficult to step back from their own work and examine the high levels of a logical framework objectively without external assistance to direct them. This is a major shortcoming of the MTR. Importantly, it underlines the need for external inputs into the M&E activities that tend towards the evaluative, which includes reviews like the MTR and this Review. The upshot of this is that the scheduling of evaluation events should be accommodated and adequate financing provided for in both the time planning and financial budgeting of a project. Good M&E is becoming increasingly important, not only because of the emphasis on adaptive project management but, critically, because M&E is seen as the basis for lesson learning and dissemination, especially when learning is relevant to a wider audience than that of the project.

Participatory Approach of the Project

The project is participatory in its approach, and consequently both the project implementation partnership between CARE, DCCFF and JECA and these implementers' interactions with the communities involved demonstrate largely good and easy relationships. While village meetings clearly operate within the framework of cultural norms for Zanzibar everyone who attends meetings has a right to speak and women participate on a fairly equal basis, especially given the strong patriarchal

tradition. Clearly the project has invested substantially in the training of project staff, communities and women to create this positive working atmosphere. Nevertheless, despite the emphasis on participatory methods, the project-staff are familiar with using very structured tools (e.g. questionnaires and exhaustive check lists for focus groups) rather than exploratory tools (e.g. semi-structured interviews and facilitation of broad themed discussions). Staff training for the facilitated self-evaluations for this review highlighted this limitation in skill sets, which is clearly exemplified by the range of tools used during the MTR. Whilst using structured tools has a function in participatory processes they need to be sequenced properly and tend to hold back discussion because of restrictions they instantly establish. Importantly, questionnaire techniques are restricted to interviewer and respondent so there is no broader exchange facilitated. The project appears to have relied upon organised exchange visits between communities and information flow through the implementers, especially JECA and the S&C unit, to provide opportunities for information sharing. Hopefully following this exercise the institutions involved will feel sufficiently confident to increase the opportunities for more direct multi-stakeholder interchanges.

Implementation

The working partnerships that have evolved during the project have been very successful for implementation. Moreover, these partnerships appear to have matured during Phase III with the appointment of a highly competent Zanzibari project manager, who originally worked within the DCCFF and who, therefore, understands the parent government institution. Similarly, JECA owes much of its organisational development to the appointment of a professional director, who is a government employee on secondment. Ability to retain staff of this calibre within JECA is one of the key sustainability issues for the organisation.

Project implementation responsibilities have been designated according to institutional roles with DCCFF leading on issues of conservation and forestry, JECA leading on facilitating community activities and CARE providing project management, back-stopping, training and new innovations such as the S&C scheme. There are imminent difficulties for the initiative in the post-project environment in that CARE staff currently undertake too much of the hands on activities and these need to be handed over to the DCCFF or JECA. However, JECA is facing a financial and possibly a personnel crisis given the contractual arrangements of the director. Additionally, the social skills available in the DCCFF appear to be a little weak if CARE is removed from its supporting role.

In hindsight, these institutional sustainability issues should have been addressed more effectively at an earlier stage of the Phase III project. Planning for exit is one of the most difficult aspects of any project's implementation, however, and while the project staff have made some plans it was not clear from the evaluation process just how far they have gone. For example, the CARE group did discuss the need to withdraw support from DCCFF during their self-evaluation (Annex 12), but ultimately this was not presented or discussed in the wider forum. Significantly, the DCCFF, JECA and the communities did not raise exit issues in the "things to be done differently in the future" discussion, which indicated that they were not thinking in terms of a post-project environment but rather they were thinking of business as usual.

A major change to the Project's operating context over that last year is that Zanzibar, in common with other major tourist destinations, has been suffering from the global decline in tourism that has followed the terrorist attacks in the USA on 11th September 2001. The decline in revenue is beginning to have an impact on the amount of money coming into the retention scheme, and communities are aware that their income generating activities are suffering because of the reduction in the number of tourists visiting the area. It is hoped that these economic factors are temporary, but in all

events it is now necessary for the implementation partnership to move into a new phase.

Results

Intermediate Goal 1: Communities around the Jozani-Chwaka Bay Conservation Area manage natural resources effectively

The Core Villages have all developed Natural Resource Management Plans: one plan is officially endorsed and it is anticipated that the other seven plans will have been published in the official gazette before the end of the project. Unfortunately, inadequate coverage of the wider villages means that plans are only partially developed for the wider area: in villages with problems such as Nungwi plans are yet to be developed and where the basic plans have been developed they are still waiting to be made operational. The process of participatory forest management planning is slow and representatives of the Wider Area Villages complained about the lack of support they have been given.

It is the evaluators' view that the project was too ambitious in trying to cover too large a geographical area in Phase III.

Intermediate Goal 2: DCCFF implements enabling policies and provides adequate support to communities for effective community-based natural resource management

During Phase III, the DCCFF succeeded in establishing the National Protected Area Board (NPAB) in accordance with the Environmental Legislation. The revenue retention scheme is now operational and it includes funds for the future National Park's management (33.6%) and DCCFF running costs (30%). Overall the DCCFF has been very active in working towards implementing its new policy.

At the time of this review the gazettelement for the Jozani National Park was almost completed. This is an important indicator because a major part of the rationale for the GEF component of Phase III was to ensure the process of the Park's gazettelement was completed. The evaluation team recognise that a range of factors have contributed to slowing the gazettelement process down. For example, time constraints on the NPAB Secretariat's activities, the availability of a lawyer from the Attorney General's Chamber, and the importance of the procedures related to possible petitions. The final stages of clarifying consent are now waiting for the villagers of Mapopwe, an enclave village, to decide whether they wish to remain inside the proposed Park or be relocated. We should note that the villages of Jozani Station have recently elected to change the basis of their compensation from a one-off payment to having a longterm stake in the future park. This is all very positive demonstrating that the concept of the PA is accepted and that the people-park relations are very positive. Nevertheless, it remains for this administrative procedure to be brought to a conclusion before the project can be considered a real success story.

While the project has been very successful in making considerable progress towards realising both the conservation and livelihood aspects of the final goal, social science skills were more visible among the NGO staff than the DCCFF. If the DCCFF is to continue to provide the support the communities require in the future this may prove a difficulty for them.

Intermediate Goal 3: Communities around Jozani-Chwaka Bay Conservation Area develop and implement environmentally friendly on-farm and off-farm income generating activities

The project has been successful in helping communities establish small businesses and income generating schemes in the Core Villages and some Wider Area Villages. Estimates provided by staff for this review (Table 3) indicate that more than 60% of the target (2500 individuals) has been achieved for these activities. However, most of the small business created is tourism dependent making it vulnerable to fluctuations in the international tourist trade.

The S&C scheme (JOSACA) is community-based, small in scale and self-sustaining once the principles are established and understood. It undoubtedly represents a replicable model of savings and credit and is an example of best practice. Nevertheless the JOSACA scheme does not permit large loans and it operates on a short loan cycle making it suitable for financing petty businesses only. This is the only aspect of the S&C scheme to be criticised by the community representatives, but increasing the size of loans and lengthening the loan cycles would require substantially more savings potential within the communities to underwrite the loans than presently appears to be available. The communities need to be careful not to increase the level of risk in the scheme such that the schemes collapse.

Intermediate Goal 4: JECA effectively supports communities to manage natural resources and income generating activities

The capacity of JECA has been greatly increased through the support given in Phase III. Significantly JECA has gained the trust of the communities and it currently performs as a highly competent and effective local NGO. However, JECA is:

- Donor dependent;
- Highly reliant upon a key individual, the incumbent director; and
- Functions only within the context of the project framework essentially acting as the local service delivery arm of CARE Tanzania.

These three factors raise serious concerns about JECAs sustainability and, therefore, future in the post-project environment. Additionally, JECA's organisational status as either a local NGO or a grass roots community-based organisation has never been satisfactorily clarified. Hence it has assumed the role of a local NGO, but it would probably be more appropriate and potentially more financially sustainable for JECA to function as a CBO. The critical issue here is the balance between staff retention and the skills available within the organisation, and its financial sustainability.

So in conclusion JECA has been a key contributor to the success of the project the critical issue is that its institutional future remains uncertain without further support in the short-term at least. JECA and the communities need further assistance to clarify its long-term institutional direction and make the transition to a post-project environment. No further support for JECA at this stage would likely result in a weakened institutional landscape because the capacity developed within communities is not yet sufficiently strong in itself to counterbalance decisions coming out of the DCCFF and the Government.

Project Impacts

The multi-stakeholder workshop provides an assessment of the project's impacts, which the evaluators felt was very fair overall. Consequently, the evaluators do not

wish to challenge this assessment, but the following comments should be taken into consideration:

Economic Impact:

There have been impacts on the economic circumstances of people living in the JCBCA, but the benefits are not sufficient and do not reach everyone. The IGAs promoted have helped to improve livelihoods and according to workshop participants they have increased community awareness and understanding of how to work more effectively with financial capital. This is a significant step forward in a generally poor society unused to working with financial assets. The JOSACA scheme was one of the most talked about aspects of the project: where it had been tried the communities wanted to expand its scope and where it had not been tried the people were eager to be exposed to it. The S&C scheme is an aspect of the project's intervention that is not tied to the conservation objectives, but which should be broadly replicable in many community situations.

Environmental Impact:

The environmental impact of the project should not be understated: the integrity of the forest and the protection of the endemics is attributable to the earlier project phases. These inputs have been consolidated through the Phase III project and it now only remains for the national park status to be confirmed. We note this is imminent.

Establishing an operational revenue retention scheme is a major achievement. However, it is essentially in its infancy and presently the project continues to subsidise DCCFF costs that, ultimately, must be borne by the scheme. It is very important that the scheme makes the transition to fully operational in order for the DCCFF to get to grips with managing any difficulties such as fluctuations in the revenue stream. Already some communities are raising questions about whether the modalities for revenue sharing are equitable and it is probable that a renegotiation of the present modalities will be necessary after a few annual cycles. It would be sensible if such a review could be scheduled while there is still a CARE presence to backstop and facilitate these discussions.

Social Impact:

In general stakeholders recognised that the project timeframe was too short for changes to be fully adopted and this is especially true where the changes involve social and behavioural change. This is a common complaint of many projects, but it remains a valid comment.

In this case the impact of the IGA and the S&C scheme have been significant and an issue discussed during the workshop, but not recorded on the final flipcharts, was the positive impact of these inputs on the status of women. Participating in JOSACA has resulted in women having access to their own money and in them exercising greater freedom by spending it on items that are for their personal use e.g. new clothes. While this may seem like a small shift in behaviour it was regarded by both male and female participants as evidence of a real improvement in the quality of women's' lives in the project area.

Institutional Impact:

The institutional impact of the project has been positive. At the end of the project with the donor funds in place the institutional landscape is characterised by diversity and constructive working relationships, but the loss of the external funding introduces an entirely new operational context. Sustainability of the intervention is ultimately

dependent on the sustainability of the organisations in the institutional landscape and only the permanent institutions have guaranteed longevity. Thus the DCCFF, the Sheha and the village, which is the unit of administration, are the only institutional elements guaranteed to persist.

VCCs are dependent on the Sheha and GoZ (DCCFF) recognising their legitimacy to act as the "community management groups" of the villages. Presently the Minister approves the VCC as the community management group specified in the *Forest Resources Management and Conservation Act No 10 of 1996. Part 1 to Zanzibar Government Gazette Vol. No. 5769 of 6th December 1997*. There may never be a problem with the legitimacy of the VCCs, but in the event that future development initiatives seek to use this legislation, or alternative legislation, to create institutions with similar roles or which assume similar responsibilities (e.g. environment committees) then there could be difficulties. Both the villages and the DCCFF need to be aware of the potential for confusion in order to avoid it or make provision for reform to the institutional arrangements such that internal village conflicts are not created inadvertently and these important co-management arrangements are not damaged in the process.

As discussed above, JECA is one of the most vulnerable components of the institutional landscape. The individual communities are unlikely to be sufficiently strong to argue their individual cases and so an umbrella organisation is important whether this means JECA in its current form is not clear. Whilst recognising that JECA is a community institution and it must carve out its own path, given the immature status of the organisation, its genesis from within the project and its importance to the institutional landscape, it would be irresponsible of donors to leave JECA to "sink or swim" without some form of backstopping for a period. This backstopping should be short-term and carefully targeted on assisting JECA to settle into an independent role.

CARE is an international NGO whose presence must by definition be temporary in this set-up and, consequently, CARE must now begin to withdraw from direct implementation if the Jozani model is to mature further and embed. Critically important here is encouraging DCCFF to assume its full role and begin to operate within the actual financial budgets of its organisation without further project subsidies, despite the vagaries of the international tourist markets.

4. Lessons learned

The stakeholders recognised many lessons that were specific to their activities and these are listed in the original transcripts of the self-evaluations e.g. success in beekeeping requires hard work and perseverance; and sometimes conservation brings conflicts. Others are more general and these have been summarised in the table below with comments by the evaluators.

Table 5 Lessons identified by the participants and Evaluators Comments

Lesson	Evaluators Comments
Change requires time - Successful implementation of livelihood security projects requires longer periods of implementation a minimum of 5 years	This is a common observation from many projects and because of the nature of integrated conservation with development it is very applicable. The wider villages in particular have not been given sufficient time in this project
The JOSACA scheme is successful for short term businesses	The S&C scheme was one of the most successful inputs into the livelihoods component of the project. It is widely replicable and does not need to be linked to conservation. It can be considered an example of good practice.
Review of the revenue sharing scheme is a continuous process	Communities are already beginning to question the division of the community portion of these funds. It is likely that the DCCFF may also wish to review the modalities in the near future. It is good practice to evaluate the performance of such schemes at regular intervals (e.g. 3-5 years). It can be a mistake to review performance too early because until there are a couple of annual cycles to assess there may be insufficient information available. Importantly discussions and any renegotiation of funding distribution must be done in a transparent and equitable manner with the involvement of all stakeholders and preferably with external, disinterested facilitation.
Developing the capacity of the project partners reduces the dependency on external expertise	Capacity has been developed through this project and it has greatly strengthened the institutions involved notwithstanding the sustainability issues surrounding JECA. Nevertheless, it is important to recognise that there are times when external expertise is not only appropriate but an advantage (e.g. see comment above)
Projects represent a reciprocal relationship between donors and beneficiaries that persists for a fixed period of time	There is a need to avoid donor dependency and this project is approaching the point at which it requires a different type of support from the donors to ensure that it transforms into a more permanent relationship between the primary stakeholders.
The partnership approach to the project's implementation has been successful	It has been very successful, but in the same way that projects can become dependent on donors it is important for permanent institutions not to become dependent on the support of institutions with a temporary mandate in the institutional landscape. There is a need for CARE the primary support agent to begin to exit.
The project activities and community empowerment have stimulated social developments in the villages	Initiating activities has had spin-offs in these villages that go beyond the basic project objectives e.g. improved community relations and an increased freedom for women

There were other lessons learned from the process of the evaluation itself - the most significant being the value of coming together to communicate and share experiences directly. Moreover these interactions were broader and more open than would have been possible if the review has used the highly structured tools originally proposed instead of working through a flexible process. This is a good lesson for the project-staff.

There was also an important lesson for the implementing organisations related to their own approach to working with logical frameworks. Logical frameworks can be used as flexible tools to assess strategic direction, as well as providing the benchmark for work planning and monitoring, but in order for this to be achieved it is necessary to reassess the log-frame and the indicators at regular intervals. Logical-frameworks do not have to be set in stone - especially in relation to important evolutions within projects - but it is necessary to use the formal opportunities built into the M&E process to discuss and endorse any changes in direction.

Clearly, the policy of using a participatory approach to forest management has paid off for the GoZ in relation to Core Villages around Jozani, but it has been less successful in applying the same approach to the difficult area of Nungwi and in bringing all of the Wider Area Villages on board. Time and resources are likely significant factors for the Wider Area Villages, but it is important to realise that the socio-economic context at Nungwi is so different that trying to simply replicate the Jozani experience at this site is unlikely to make any significant impact. Nungwi requires its own independent situation analysis and tailored intervention. This is an important lesson that regardless of the soundness of the general principles each site is specific and applying the process as a blueprint tends to result in a poor outcome.

The donors need to take on board the importance of not confusing significantly different situations in their desire to replicate and disseminate successes quickly. Piggy-backing the intervention at Nungwi onto the project was an example of poor practice. The appropriate solution to this problem would have been to develop an independent sister project with relevant cross-linkages to ensure a coherent and coordinated programme within the DCCFF.

5. Conclusions and Recommendations

In conclusion, the Phase III project is the final input into a series of projects aimed at achieving the dual objectives of sustainable long-term conservation of Zanzibar's unique forest biodiversity and livelihood enhancements for the local population. The project has succeeded in making an impact on both objectives contained within its overarching goal. Similarly, it has gone a long way to achieving the four intermediate goals of: assisting the communities to manage their natural resources more effectively; transforming the DCCFF into a successful and modern conservation organisation with a pro-people approach to resource management; promoting environmentally friendly IGAs; and establishing an effective local civil society partner, JECA, to support communities. This is a good overall result and the project can be proud of its achievements.

There are, however, shortcomings some of which are more serious than others. Many of the minor issues have been highlighted by the stakeholders themselves and they can be addressed by them directly without further intervention. However, the evaluators believe that the more serious issues could undermine the efforts of the project in the longer term and, therefore, require a different type of response. This includes exploring the possibility for specific and targeted areas of additional support. These more significant issues together with associated recommendations are outlined below:

Projects were recognised as reciprocal relationships between the donors and the beneficiaries that are of fixed duration.

This project has been implemented over a period of eight years, whilst acknowledging that change requires time and long-term support, most of the implementers showed they have some awareness of the need to move into a different type of implementation phase, despite framing many of their future recommendations in terms of business as usual. How to exit from a project intervention without damaging what has been built is a perennial problem faced by both the donors and beneficiaries. The JCBCP has prepared an exit strategy and although it was not clear to the evaluators whether this was adequate, or not, it is important to begin implementing it. Provided a flexible approach is adopted, including opportunities for strategy review and backstopping, the project has more to gain by moving into a new phase of its own development than by standing still.

Recommendations:

- **The DCCFF and JECA begin to operate as defined in the exit strategy**

The institutional landscape of the project needs to settle down into a more permanent and sustainable arrangement. Project and implementing partners to review exit strategy and individual sustainability plans in the light of this review

The DCCFF is the permanent institution representing the GoZ - it is now critical that it assumes its full role in supporting participatory forest management and demonstrates its independence from the external support. It is only by doing this that the DCCFF will see the real capacity developed during the project's implementation and be able to capitalise on this capacity, but also identify any gaps.

Similarly, the questions of JECA's sustainability cannot be resolved while it continues to operate as a local implementation arm of CARE Tanzania. It is not clear whether JECA would be a stronger and more valuable organisation by making the transition to

become a fully fledged local NGO in its own right, or to reaffirm its position as an umbrella association of villages i.e. a CBO. Largely this decision needs to be determined by the aspirations of JECAs constituency, which is the villages, and this requires consultation. To facilitate this transition it would be wise to have a new, relatively short-term arrangement in place in which CARE can act in a backstopping capacity to help to resolve teething problems.

Recommendations:

- **CARE reviews its position in the institutional landscape and takes steps to begin withdrawing. CARE to operate in a backstopping and trouble shooting capacity only. This may necessitate a review of the proposed exit strategy.**
- **DCCFF review its internal capacity to fill any gaps that may be left by the withdrawal of CARE staff e.g. social analysis skills and seek means to address them.**
- **JECA should clearly separate from the project (and acting as a service provider for CARE) while it undertakes and implements the outcome of institutional review to define its own vision.**
- **CARE and/or UNDP should offer to assist JECA in sourcing additional small scale funding, through whatever organisational support is available to support development of civil society organisations. Funding should be sufficient for JECA to undertake an institutional review and make the appropriate organisational transition. This transition should be rapid i.e. not more than 6 to 12 months.**

The Core Villages need to move into full implementation mode of their newly endorsed management plans. The Wider Area Villages require more support to complete forest management planning.

The DCCFF and JECA have the skills to assist both sets of villages. The key issue is that of resources. DCCFF will need to plan its budgets and work schedule such that it prioritises forest management planning for the Wider Area Villages. It may also need to further prioritise working with villages that are closer to completing plans at the expense of those that have not yet started. In general, the DCCFF needs to consolidate what is started. Core Villages should need less financial and human resources support now: the critical issue will be to monitor progress and problems only stepping in where a village has a problem it is unable to solve.

Recommendations:

- **DCCFF and JECA to set-up regular monitoring of Core Villages and to agree with the Wider Villages on priorities for planning support in the event that this is not already taken care of by the exit strategy**

The National Park gazettement process for Jozani is still ongoing.

A driving force for the Phase III project was the opportunity to finally achieve National Park status for the Jozani forest. This process was almost completed while the Review was being undertaken and the formal launch of the National Park is anticipated in early 2004. Given time constraints on the NPAB and the need for legal support to be readily available until the gazettement is published the evaluators felt that drafting in additional support to assist the NPAB including temporarily hiring legal support should be considered.

Recommendation: The gazettelement of Jozani National Park to be completed as soon as possible.

The successful JOSACA experience merits replication and dissemination

As one of the most successful aspects of the Phase III implementation it would be useful to both open up this opportunity to the remaining Wider Area Villages and arrange to document the case-study for wider national and international learning.

Recommendation: Document and disseminate the JOSACA case study.

The successful establishment of the Revenue Sharing Scheme needs to be monitored and then reviewed after a suitable period of implementation allowing for adjustments to be made to the modalities

Following three annual revenue sharing cycles a full review of the scheme should be undertaken. It is likely that stakeholders will want to renegotiate or at least discuss the possibility of renegotiating the modalities, and for this reason independent facilitation would be advisable. It would be best if this could be undertaken before the completion of the proposed backstopping period by CARE Tanzania.

Recommendation: Make plans to review the operation and modalities of the revenue retention scheme before the final withdrawal of CARE Tanzania.

Annexes

Annex 1: Terms of Reference: Final Project Review -Jozani - Chwaka Bay Conservation Project, Zanzibar Tanzania

PROJECT SUMMARY SHEET

Country	Tanzania
Project title	JOZANI-CHWAKA BAY CONSERVATION PROJECT
Thematic area	Integrated Conservation and Development
Total project budget in ATS/ EURO/USD	
GoA contribution	EUR 365,097
GEF UNDP	USD 747,500
Location of project	Zanzibar
Target population	Communities adjacent to the conservation area (5,000 households)
Estimated starting date	June 2000
Estimated project end date	May 2003, June 2003 for the UNDP/GEF component
Name of applicant organization	CARE Österreich Invalidenstr. 11 1030 Wien Tel.: +43 (1) 715 0 715 Fax: +43 (1) 715 9 715 care@care.at
Contact Person of the applicant organisation	Peter Scheuch Program Coordinator – Environment & Development peter.scheuch@care.at Alan Rodgers Regional Coordinator UNDP-GEF Tanzania alan.rodgers@cybernet.co.tz
Name of partner organization	CARE Tanzania P.O. Box 10242 Dar-es- Salaam Tanzania Tel: +255 (22) 2666775 Fax: +255 (22) 666944 CARE-TZHQ@care.or.tz
Contact Person of the partner organization	Thabit Masoud CARE Tanzania - Zanzibar Area Coordinator P.O.Box 3526, Zanzibar, Tel: 255 24 223 6089; Fax 255 24 223 5991 E-mail: thabitmasoud@redcolobus.org
Overall objective	THE INCOME AND ENVIRONMENTAL SECURITY OF 5,000 HOUSEHOLDS IN JOZANI-CHWAKA BAY CONSERVATION AREA IS ENHANCED, WHILE BIODIVERSITY FLOURISHES

1. BACKGROUND

1.1 Short project description

The Jozani-Chwaka Bay Conservation Project (JCBCP) is an Integrated Conservation and Development Project (ICDP) designed to upgrade the conservation status of Jozani – Chwaka Bay Conservation Area (JCBCA) to become a National Park and improve the living conditions of the communities around. The conservation area is situated at about 35 kilometers south of Zanzibar town with coverage of 2,512 hectares and will expand to 5,000 hectares when declared a National Park. Eight communities that surround the protected area are fully involved in the management of park resources as project partners. The project has recently extended further to the Southern part of Unguja island, North Unguja and Pemba in its efforts at promoting

community management of forest and wildlife resources as well as developing alternative income generating activities.

Jozani harbours species of global conservation interest including rare and endemic species of flora and fauna. There are five major ecosystem types that deserve protection under the proposed park including swamp forest, the coral rag forest, salt marsh, mangrove and the sea grass beds.

This final review aims to assess all aspects of the project's impact and processes including relevance, efficiency, effectiveness, and sustainability of the strategies and interventions within each project' intermediate goal, conservation and development impacts; the effectiveness and processes of the project partnerships; and seeks to draw key lessons learned and recommended actions for sustaining project activities when donor support ends. This review will be carried out starting from 21 April, 2003.

1.2 Strategic context and concept of intervention

The Jozani Chwaka Bay Conservation Project was established in April 1995 by CARE Tanzania and the Zanzibar's Department of Commercial Crops, Fruits and Forestry, to conserve the highly bio diverse and valuable Jozani-forest and to improve the livelihoods of those communities most dependent on the area's natural resources. At that time, CARE Tanzania was less than a year old and was primarily providing assistance to refugees. The JCBCP thus was the first of CARE Tanzania's conservation and development projects and today it is the oldest of the country office's projects. Funded by the Government of Austria and CARE Austria, since its inception, and in the last three years by GEF/UNDP, the McKnight and Ford Foundations, the project will complete its third and final phase for Austria in May 2003 and June for the UNDP/GEF component. Single review has been agreed for both components since both addresses the same overall Goal/Objective. The project conducted an "internal" pre-evaluation in October 2002 to provide data to inform the final review; provide information on current project status and areas needing strengthening prior to the closing of the project; and to build capacity of staff in review.

The final goal of the project is:

The income and environmental security of 5,000 households in Jozani-Chwaka Bay Conservation Area is enhanced, while biodiversity flourishes.

The intermediate goals (IGs):

The project has four intermediate goals, each dealing with a specific component of the project.

IG 1: Community around Jozani – Chwaka Bay Conservation area manages natural resources effectively (Community conservation initiatives)

IG 2: The Department for Commercial Crops Fruits and Forest implements enabling policies and provides adequate support to communities for effective community based natural resources management (Capacity building of the DCCFF for CBNRM and National Park development)

IG 3: Community around JCBCP develops and implement environmentally friendly on and off – farm income-generating activities (Enterprise development).

IG 4: The Jozani Environmental Conservation Association (JECA) effectively supports communities to manage natural resources and income generating activities – Capacity building of community NGO

Primary stakeholders include 5,000 households in eight Shehia communities around Jozani-Chwaka Bay proposed National Park, nine Shehias on the Jozani wider area, south of Unguja, Nungwi Community on the North and 10 village communities around

Ngezi forest in Pemba. These stakeholders consist of forest occupants (tenured migrants), indigenous peoples, farmers and other landless workers. The project also seeks to strengthen the Protected Area Management Unit through DCCFF and community based organisation (JECA) through the village conservation committees (VCCs).

1.3 Phases of implementation

As mentioned in 0 above, the project has been operational for the past seven years in three different phases and will be completing its third phase in May 2003. In all the three phases, the long term goal of the project has never changed although emphasis on the range of outputs and activities has been varying. In the first phase (1995-97), more emphasis was put on awareness raising and institutionalizing community participation in forest and wildlife resources management. It is in this phase where the conservation committees were formed, participatory resource management techniques employed and boundary identification started. In the second phase (1998-99), the emphasis was much more on income generation because in the first phase, this component could not take off satisfactorily. Savings and credit component was established, studies on alternative income earning opportunities conducted and sensitization work commenced. Again due to limited funds protected area management and community conservation initiatives could not prosper. The project is currently finalizing its third phase (2000-2003), which has effectively combined the efforts of the first two phases to achieve the predetermined goal. The national park development strategies were revitalized, policy advocacy issues pertinent to conservation and community development effected, community resource management agreements finalized and encouraging progress on income generation realized. Project services were also extended to Nungwi (North Unguja) as well as to Ngezi Forest Reserve on Pemba. The project therefore, aims to conduct a final review (FPR), in April 2003, which shall include components funded by GEF-UNDP and Government of Austria and CARE-Osterreich, and will specifically target on the third phase of intervention.

2 OBJECTIVES OF THE REVIEW

2.1 What is the reason for conducting the review

The final review is a requirement by UNDP/GEF, GoA/COe (as per the project documents), partners and the government of Zanzibar to provide objective assessment of the project implementation and lessons to guide future conservation efforts.

The overall objectives of final project review include:

- ◆ To identify strengths and weaknesses during project implementation;
- ◆ To assess level of achievement of the intended impacts and potential for long-term sustainability
- ◆ To capture lessons learned in project design, implementation and management; and
- ◆ To make recommendations regarding specific actions that might be taken in future projects.

This final project review will address issues of design, management, implementation and monitoring of the project. Specifically, the review should address the following questions:

1. Has the project made satisfactory progress towards achievement of the intended impact?

2. Has the project implementation and execution modalities operated effectively, efficiently and in a timely manner?
3. Are the innovations developed through this project working?
4. Is the impact of the project likely to be sustained?
5. Lessons learned: e.g.
 - what has worked particularly well and could be considered “best practice”?
 - what should be done differently in similar projects in the future?
 - what should not have been done because it had little or negative impact on the overall objective?

Recommendations

The results of the project review will also include recommendations to inform major stakeholder groups, the government partner, the community and other beneficiaries, on how best the existing interventions and benefits could continue and provide the lasting change to target group.

2.2 What purpose and whom are the findings intended to serve

The purpose of the review is to facilitate a participatory final evaluation of the project, focused on all project indicators in the log-frame, as well as other criteria to be defined by community members, project staff, donors and other stakeholders. Such criteria should be related to project processes and strategies; participation; sustainability; cultural relevance; gender; and width and depth of impact. This review will establish an opportunity for organizational learning through identification of best practices and gaps during implementation, in the light of internal and external experiences.

The main purposes are:

- *Project Assessment*: To review progress towards achieving the project’s conservation and development goals and areas of impact; the intermediate goals and associated outputs as specified in the logical framework.
- *Lessons Learned*. To identify develop lessons learned, constraints, implementation approaches and management structures during implementation.
- *Recommendations*: To provide recommendations to major stakeholder groups, the government partner, the community and other beneficiaries, on the ways to sustain the positive attributes or benefits of the project intervention.
- *Assess Accountability*. To assess the accountability of partners, project managers and beneficiaries and suggest strategies to maintain accountability when donor support comes to an end.

This review will provide information for all key players and interested parties including the donors, partners and beneficiaries.

This review approach aims to include beneficiaries and partners as participants within, as well as from outside the project and to engage them in a learning process. As all stakeholders learn and share knowledge in a co-operative relationship with the Facilitator Team, it increases the likelihood of the project partners adopting and achieving the intended objectives.

As such, they also decide on the detailed Key Questions and Issues (KQI), conduct research, analyze findings and make recommendations. The external evaluator and his/her team become facilitators in this participatory review, animating workshops, guiding the process at critical junctures and consolidating the final report.

3 METHODOLOGY

3.1 Type and depth of the review

(Desk and/or field study, form of participation of parties involved)

The methodology is designed to assess active participation of the partners, stakeholders, and beneficiaries on project implementation and to guarantee continuation of interventions in when donor support has ended. Certainly, an objective external point of view will be valuable to the learning process. However, the results of the review will be enhanced by the degree to which stakeholders entrusted with the assessment are motivated and are able to translate into action what they have learned through review work.

The external review consultant will serve as a facilitator to the whole process. As a facilitator, the consultant's role will be to help draw out the various viewpoints of stakeholders on the objectives and results expected. The facilitator will guide stakeholders in coming up with shared objectives, taking stock of the process and outcome of the project, and exploring with stakeholders suggestions for the future and new areas of focus.

Some key principles important for this approach are outlined below:

- *Participatory reviews focus on learning, success and action.*
Review what we learned about what worked and what did not work. Then we need to ask how can we use these learnings to move to action or share with others. The people and groups most directly involved decide what determines success.
- *The review is useful to the people who are doing the work that is being evaluated.*
The project's goals and objectives must be the standards against which the project work is measured. Evaluators must pay special attention to the project's specific needs and available resources.
- *The project stakeholders are responsible for defining the specific project review questions, focused on the indicators of success and the time frame.*
Stakeholders of projects must participate in decisions about what questions will be asked and what information has been collected to measure the difference, the work made in a given period.
- *Participatory review makes it possible to recognize shared interests among those doing the work, the people the work is designed to reach, the project donors and other stakeholders.*
The review must include information and input from the people doing the work, the people who the work is designed to help or reach and the project donors.

3.2 Whom should the recommendations address

The recommendations should be addressed to the Project Management (CARE and DCCFF) and Donors and with a specific mention of the Government of Austria, CARE Austria and GEF/UNDP.

3.3 Indication of information sources

The review team will select any required documents produced during the project implementation, e.g.:

- Contracts/Agreements between CARE and donors
- MOU between CARE and Project partners
- Annual/Quarterly Work Plans and Budgets
- Annual/Quarterly Project Implementation Reports (PIRs)
- PRA Reports
- Project review reports
- Other project materials e.g. technical reports

4 REVIEW CRITERIA

The following is the general list of criteria that needs be emphasized and guide on the development of the Key questions and issues during the review process. In each of these criteria, gender sensitive approach shall be applied:

Compliance – whether the project has been complying with the fundamental principles of poverty reduction, gender equity and respect for cultural and natural environment

Relevance – the relevance of the project to the target group; the extent at which their needs have been addressed; and whether the interventions comply with the development policy and planning of Zanzibar Gov't

Participation and shared responsibility – the degree at which the strategy and decision making empower the target group. Also the extent at which the intervention provide for building the corresponding capacities of local institutions

Impact – what are the positive and negative consequences, intended and unintended. Also examining technical, economic, cultural, ecological and political impacts

Sustainability – longer term effect of the intervention and its consequence.

The specific criteria critical for the success of the implementation of the project will however be selected after the detailed KQIs have been developed at the beginning of the review phase.

5 KEY QUESTIONS

During the planning stage the project management and partners with the support of a local facilitator, will visit key stakeholders to develop a common understanding of the review process to formulate *draft key questions and issues* (KQIs) that were critical for the achievement of the project objectives. In this brainstorming session, representatives of each key stakeholder group⁹ will develop initial key questions and issues based on their group's role and interests in the project. These KQIs will then be consolidated and circulated to the Facilitator Team for comments.

KQIs to be explored could include: capacity of the local institutions, conservation and rehabilitation of community managed forest areas, protected area management and rare species conservation, institutional and policy development, partnership relations, conservation and development links, sustainability and financial viability, increase in sustainable household livelihood security, role of women and gender participation. However, the final KQIs should come from the stakeholders based on their priorities and perceptions. The assessments are carried out before the actual review stage in order to allow an adaptation of the schedule to stakeholder needs and to reduce the time and costs for the external facilitator.

Additionally, members of the Implementation Team and selected/interested representatives of stakeholder groups will undergo an *orientation on the use of some PRA methods and tools and their application in the review process*. This includes interviewing and focus group discussion skills and hands-on exercises such as matrices, ranking, community mapping, force field analysis, historical timelines, gender decision of labor, transect walks, etc. Some or all of these tools will be used during the review process. However, these training are part of capacity building for local institutions and should provide knowledge even after completion of the project

⁹ This includes: individual stakeholders (indigenous peoples and farmers); community-based organizations (CBO); VCCs, Protected Area Management unit; Project Management and Partners

The draft KQIs will provide the basis for the definition of the final and detailed KQIs with support of the external facilitator at the beginning of the actual review stage. During this stage, each of the detailed KQIs will be examined utilizing the list mentioned under the (4 Review CRITERIA).

6 REVIEW TEAM

As a participatory review activity, the review team (includes Team A to D) will involve key stakeholders from the project area, partners in government and community NGO, community-based organizations, among others. The following table shows the different groups and the table in chapter **Error! Reference source not found.** showing the various levels of involvements during each step.

TEAMS	# OF PART.	TOTAL
A. EVALUATORS	2	2
▪ External (International) facilitator (Team Leader)	1	
▪ Local facilitator	1	
B. IMPLEMENTATION TEAM	9	11
▪ Project Management Office (PMO)	3	
▪ CARE Österreich - Program Coordinator (ED PC)	1	
▪ Implementing Partner NGOs (CARE and JECA)	2	
▪ National Government Agencies (DCCFF, District Admin, DoE)	3	
C. STAKEHOLDER TEAM	27	38
▪ Advisory Committee representatives	3	
▪ Shehia Government representatives	8	
▪ Community-Based Organizations of primary stakeholders (VCCs, indigenous peoples, farmers, savings and credit groups, production groups)	16	
E. OBSERVER TEAM	3	41
▪ CARE International Tanzania Representative (ICD Sector Coordinator)	1	
▪ Donor Representative (GoA, UNDP/GEF)	1 + 1	

6.1 Roles and Functions

6.1.1 The Evaluators

The Evaluators team consists of the *External consultant* and the *Local consultant*. The external consultant is the Team Leader and will be responsible to ensure that all major findings and recommendations are included in the final report. Should there be any disagreements between the team members, the findings and recommendations by the team, the team leader's decision will be taken final.

The team leader will also be overall responsible for ensuring that all parts of these TORs are being addressed satisfactorily in the final review report.

The Team Leader shall be selected based on the following criteria:

- Must have at least five years of continuous professional experience in the application of participatory tools and processes in review.
- Must have at least three years of continuous professional experience in the design, monitoring and review of integrated conservation and development projects.
- Must be willing to work with national professionals and project-level staff.
- Familiarity with the East African conservation and development context will be useful.

The Project Management (PM) will hire a *local consultant* to facilitate workshops with various stakeholder groups designed to develop a common understanding of the review framework and generate draft key questions for the review. He/She will also facilitate highlight the common/important PRA tools. During the review stage the local

consultant will assist in facilitating workshops involving community groups who may need to discuss review issues in Kiswahili. The responsibilities of the team leader and the team members are governed by these TOR and are expected to work in a team. However, each member will be responsible for his/her respective area as designed by the team leader.

Scope of work for the Evaluators:

- To develop an overall design of the review to include developing key questions and issues, selection of respondents, determination and allocation of sampling units
- Revisit the Midterm review findings and recommendations especially in the areas of fuelwood demand and income generation, emphasizing participatory information analysis through involvement of the implementation team, taking into consideration alternatives for further support in interests of sustainability and donor coordination.
- Revisit report and documents in 0 above to help draw conclusive remarks and recommendations for the review process.
- Take facilitating role in the review process, specifically during workshops and gathering of field information.
- The evaluator will provide contextual inputs on key themes to be explored
- Preparation of draft report, incorporate comments and develop final report according to the prescribed format in this TORs.
- Presentation of findings to the Project 's Senior Management, partners and Advisory Committee. The ¹⁰local consultant shall present the findings to the donors

6.1.2 Implementation Team

The Implementation Team is the main group that is normally implementing the project, and responsible for the realization of the review process as well as coordinating adjustments when donor funding is phased out. The team will first of all provide info to the review and will secondly assist in the review. Although the review process is mainly designed by the Facilitator Team with support of the project staff and the CARE Österreich representative, the process will further be discussed and agreed with the Implementation Team.

The main roles and responsibilities are:

- Generation and sharing of information
- Facilitate stakeholder group meetings and field activities
- Analyze results and develop recommendations through assistance by facilitation team
- Part of implementation team will implement recommendations when donor funds has phased out.

6.1.3 Stakeholder Team

The Stakeholder Team represents all stakeholders in addition to the Implementation Team visited during the course of the review. The number of people mentioned in the overview is therefore only the minimum number of people visited in order to ensure the

¹⁰ Separate TORs for the local consultant will be developed by the Project Management
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involvement of each stakeholder group. The actual amount of people visited in the field will depend on the KQI defined in the beginning of the review stage.

- Generating and sharing information at their stakeholder group level
- Preliminary analysis of findings, lessons learned and recommendations
- Feedback and dissemination of review results

6.1.4 Observer Team

The observer team will be observing that the review is done according to the ToR. The observer team will consist of one representative from CARE Tanzania, and representatives from the two donors, the Government of Austria and UNDP/GEF

7 TIMETABLE AND WORK PLAN

See the attachment.

Description of the Review Steps

7.1.1 Preparation phase: Consolidate framework, finalize KQIs and agree on indicators and methods of information collection

The project management with a local facilitator will meet with the Implementation Team to develop the framework for the review. This will involve the drafting of the key questions, reviewing and agreeing on the final list of KQIs to be addressed, identifying indicators that will help to answer these questions and selecting the appropriate participatory methods and tools for verifying each indicator. Key informants from different stakeholder groups will be involved as individuals or as members of small or whole groups, committees, whole organization, to include key officers, staff members, among others.

7.1.2 Review phase: Workshops/field visits

The external facilitator will arrange several review teams for the field visit. These teams will use both direct observations and small group meetings (where PRA/PLA tools can be used) with identified stakeholder group representatives or members to generate the answers to the KQIs. An open and transparent process of discussion will be used to *facilitate the sharing of information on the processes and outputs of the concerned component and/or the project as a whole. An action-reflection-planning process* will characterize field review activities at all levels. Two workshops will be organised for the purpose of reviewing the field information, document the results and draw lessons learned. The facilitator and the team will consolidate specific recommendations and carryout debriefing with key staff and project management to foster understanding of review results.

7.1.3 Reporting phase: Collective reflection and consolidation of findings and lessons learned

The review teams will reconvene as Implementation Team to *review and reflect on their findings and draw up lessons learned*. The External Facilitators will handle the whole reflection and learning session that will showcase the drawings, community maps and findings of the review teams. Draft report will be developed and preliminary findings will be shared with the stakeholders in the field as part of the process. Comments for the draft report will be collected and final report produced.

8 REPORT

8.1 Debriefing

Separate debriefings for the Implementation Team and the Project Advisory Committee (PAC) are scheduled in order to allow different levels of depth of discussions.

8.1.1 Debriefing with Implementation Team

A debriefing will be held with partners and staff involved in the project including key members of DCCFF, CARE and JECA to share the results and recommendations from the review in May 2003

8.1.2 Debriefing with project SMT and Donors.

A final debriefing will be done with project SMT on 20-21 May 2003 and with Donors on 2 June 2003. This debriefing will provide the SMT and donors, a consolidated picture of the review findings, recommendations and lessons learned from the review process.

8.2 Reporting

In order to ensure a high accuracy of the final report, the draft review report will be shared with various stakeholder groups for review and validation through the SMT. After considering inputs from stakeholder groups, the External Facilitator will submit the Final Report to CARE Austria and CARE Tanzania. CARE Austria and CARE Tanzania will disseminate the final report to donors, partners and stakeholder groups. CARE Tanzania will facilitate the translation of key portions of the review report into Kiswahili, especially the findings, recommendations, and lessons learned for non-English speaking stakeholders.

Workplan overview, provides a short overview of the responsibilities and timeline for reporting:

The product of the review is a Final Review Report in English. The report should have the following format to capture the requirements of the main donors; GoA and UNDP/GEF.

Review Report Outline

Executive summary (3 pages)

- How the review was conducted
- Brief description of project
- Context and purpose of the review
- Main conclusions, recommendations and lessons learned

Introduction (3 pages)

- Purpose of the review
- Key issues addressed
- Methodology of the review: (covering the general approach, empirical sources, main analytical instruments, profile of the review team, scope and limitations of the review).
- Structure of the review

The project(s) and its development context (4 pages)

- Project start and its duration
- Problems that the project seek to address: Justification and context at the start
- Immediate and development objectives of the project
- Relevance of the project in relation to the needs and priorities of the country
- Relevance in relation to main stakeholders or target groups

- Results expected

Findings and Conclusions

(8 pages)

- Project formulation
 - Process or approach used
 - Linkages between project and other interventions within the sector
 - Indicators
 - Management arrangements, including monitoring and evaluation
- Implementation
 - Execution and implementation modalities
 - Changes of project context during implementation
 - Co-ordination and operational issues
 - Adequacy of monitoring mechanisms
- Results
 - Immediate results at the regional, national and site levels (should deeply articulate effectiveness, efficiency and impact/effects of interventions)
 - Sustainability at present and/or to be expected. Include factors found to have positive or negative impact on sustainability
 - Contribution to upgrading skills of the regional, national and local stakeholders

Lessons learned

(3 pages)

- Best and worst practices in addressing issues relating to relevance, performance and success
- General experience in terms of development policy or sectoral policy

Conclusions and Recommendations

(4 pages)

- Conclusions
- 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 – if possible naming the parties addressed

Annexes

(10 pages)

- TOR
- Itinerary
- List of persons interviewed
- Summary of field visits

List of documents reviewed

Questionnaire used and summary of results

The final report shall be drawn up using Microsoft Word Software and according to the above format and descriptions in English. It shall be clear and concise, limiting itself to essential points (volume 30-40 pages). Detailed materials shall be attached as appendix.

Annex 2: Itinerary

DATE	ACTIVITY	COMMENTS: People/ Institutions Involved
April 20 Sunday	Arrival in Zanzibar	
21 Monday	First Review of Evaluation Process CARE Austria/ GEF Clarification of perspectives on ToRs. Courtesy Call Director DCCFF	Representative CARE Austria, Project Manager, Consultants, Representative of Implementation Teams
22 Tuesday	Second Review of Process - discussions with Implementation Team and agreement to reject Key Questions Approach	Representative CARE Austria, Project Manager, Consultants, Representatives of Implementation Teams
23 Wednesday	Visit to IPU Planning Office Finalisation of methods approach with Implementation Team Representatives	Consultants visit Mr Mohamed Haji Project Manager, Consultants, 3 Members of Implementation Teams
24 Thursday	Training Day for Implementation Teams	Implementation Teams, Project Manger, Consultants
25 Friday	Facilitated Village Self-Evaluations in Pete; Kitogani and Ukongoroni	Implementation Teams Local Consultant - Pete Village; External Consultant Ukongoroni and Kitogani
26 Saturday	Implementer Assessment of Logical Framework	DCCFF, JECA, CARE
27 Sunday	Facilitated Village Self-Evaluations in Kibuteni; Nungwi and Kizimkazi- Mkunguni CARE Self-Evaluation	Local Consultant Kizimkazi- Mkunguni
28 Monday	DCCFF, JECA, Self-Evaluations Preparation for M/S Workshop	Representatives
29 Tuesday	Multi-Stakeholder Workshop Day 1	All Stakeholders and UNDP Representative
30 Wednesday	Multi-Stakeholder Workshop Day II	All Stakeholders and UNDP Representative
May 1 Thursday	Agreement of Evaluation Findings and Recommendation Preparation of Presentation	Consultants
2 Friday	Debrief and Presentation to DCCFF Fly to Dar es Salaam Presentation to UNDP and CARE Tanzania (UNDP Offices Dar es Salaam)	DCCFF and Consultants Dr Alan Rodgers (GEF); Mrs Gertrude Lyatuu (UNDP); Mrs Katrin Lervik (UNDP), Dr David Howlett (UNDP); Mr Sammy Masanyiki (CARE); Mr Chris Sykes (CARE); Mrs Josephine Ulimwengu (CARE); Gabriel Batulaine (CARE)
3 Saturday	Report Drafting Leave Dar es Salaam	

Annex 3 Methodology

Introduction

This Terminal Review was commissioned jointly by the GoA and CARE Austria as a final review for the JCBCP, with a specific focus on a participatory process to promote stakeholder groups and project self-learning and by the GEF/ UNDP which required, as is normal at the end of a project, an external, terminal project evaluation focusing on impact. The development of the joint ToRs by the donors did not fully clarify their different objectives and the implications of these two purposes until the very start of the evaluation itself. This was demonstrated by the fact that the ToRs had undergone some discussion through email before being forwarded to the consultants, but they had not been finalised in an absolute sense. In particular, there were continuing changes of title of the role of the consultants - in one version of the ToRs they were described as evaluators in another as facilitators while the final version sent to the external evaluator mixed the two titles - so it was not entirely clear as to the detailed role of the consultants would be in the Review.

Additionally, CARE Austria had pre-determined the Review methodology by outlining a specific Key Question Methodology that it had used previously in the Philippines to conduct an Inception Review. This methodology, outlined in Box 1, aimed to maximise the contribution of the project "partners, stakeholders and beneficiaries"¹¹ on the understanding that they are the key actors for any post-project continuation. The methodology, therefore, largely dispenses with consultants viewpoints except in relation to refining the key questions and facilitating the process for the stakeholders. The use of the term evaluator and the UNDP requirements, therefore, introduced contradictions.

Firstly, it is important to recognise that the two purposes of an external evaluation and a self-learning review are quite distinct and that they require different methodological approaches. For a terminal evaluation an objective, external perspective of achievement according to the criteria established by the logical framework is central to making a valid assessment of the project's outcomes - i.e. it is the evaluators' views and objectivity that count. In the type of process CARE Austria was commissioning it is the stakeholders' perspectives that count, regardless of objectivity and without necessarily referring to the logical framework. Specifically an external viewpoint is not sought: the external inputs are restricted to facilitation and they are simply the means to draw out the stakeholders' views and assist the project in documenting them.

The two purposes, however, need not be mutually exclusive, but if both objectives are to be largely achieved then some compromise is required and the consultants need to undertake both the roles of evaluator and facilitator. Importantly, there would be a need for some compromise between the different donor objectives: essentially a prioritisation of the objectives agreed and an approach developed that would allow the consultants to layer the two sets of tasks on top of each other according to the agreed priority. The first task of the external evaluator was to address these issues.

¹¹ Defined in the methodology as: individual stakeholders (indigenous people and farmers); community based organisations; village conservation committees; Protected Area Management Unit; Project Management and Partners

Box 1: KEY QUESTIONNAIRE METHODOLOGY

Planning Stage (Brainstorming Process)

- Project managers and implementers assisted by a local facilitator visit key stakeholders to develop common understanding of the review process;
- Working with key informants the implementation team brainstorms the key questions (KQs) and issues that are critical to the achievement of the project's objectives.
- The method predicts that the KQs that will emerge will be based on specific group interests.
- All the KQs are then consolidated and circulated to the Facilitation Team
- Guidance is provided to direct stakeholders to explore a wide range of relevant issues such as: capacity of local institutions; conservation and rehabilitation of community managed forest areas; increase in livelihood security; and role of women and gender participation. BUT it provides latitude for stakeholders to raise their own concerns and recognises that issues should be based on stakeholders' priorities and perceptions.

Important Factor:

These assessments are carried out before the review begins and the external facilitator arrives. The stated reason for this is to reduce the time and costs associated with an external facilitator. But taking this approach demands a good understanding of the process and its objectives by the Implementation Team and Local Facilitator - as well as the external facilitator

Review Stage

- Starting with the KQs developed in the planning stage the facilitation team revises the KQs.
- The Implementation team makes field visits and using participatory tools (direct observations and PRA tools) generates the answers to the KQs.
- The results are then reviewed in a workshop setting, which is also used to document the lessons learned.
- Finally there is a debrief to key staff aimed at fostering understanding of the review results.

Important Factors:

Critically, the methodology assumes that KQs will emerge from the planning phase that are suitable to assess the **Review Criteria** of the **Project's Compliance, Relevance, Participation, Impact and Sustainability**.

The approach assumes (and requires) a high level of understanding of and ability to apply PRA tools (e.g. focus groups and semi-structured interviewing techniques as well as ranking exercises, transect walks, historical timelines; community mapping) in the Implementation Team.

Lastly, the method demands either sufficient time, or a large enough Implementation Team, to apply the approach to answering the KQs.

Revising the Outline of the Review Process

In order to preserve the focus on a participatory process to promote stakeholders' and project self-learning it was agreed that these concerns would have priority over the evaluation aspect. The evaluation would, therefore, be layered on top of a self-learning process. This meant that direction of the assessment and the bulk of the information would fall-out of the stakeholder priorities. Nevertheless, undertaking an evaluation based on an objective assessment requires referring to the log-frame, otherwise the adequacy of project design and effectiveness, in particular, cannot be assessed objectively. So the idea to have a specific logical framework assessment, which would generate a parallel set of information, was introduced to create a better balance between the subjective and the objective (see also comments on Mid-term Review below). There was no reason, however, why the logical framework assessment could not also be conducted through a self-evaluation process. Both processes would then be brought together in a final Multi-stakeholder Workshop to assess the Project's impact and agree the lessons learnt. The evaluation team (local and international consultant) would then use all available information to reach their independent conclusions.

Significantly, this approach retained the emphasis on the internal learning with the issues and concerns for discussion being raised by the stakeholders, not the consultants, but the process provided scope for the evaluation to be layered on top. It also allowed the Review Criteria to be explored. For example, the Multi-stakeholder workshop was focused on assessing impact.

The only major disadvantage for the external team was that the process was very unlikely to generate an information base, which could fully address all aspects of the Review Criteria. For example, Compliance and Relevance are contextual and require policy review while the time-frame for the Review meant there was negligible time available to plug such gaps. Certainly aspects of a traditional evaluation that required assessing project expenditure such as cost efficiency could not be appraised and, indeed, it would have been inappropriate for a Review prioritising the self-learning focus. The Final Process used is outlined in Box 2.

Once the outline was agreed in principle the next issue was what use to make of the key questions that had already been developed.

The Key Questions

The Implementation Team had gone to various villages and undertaken key informant interviews producing over 100 questions and issues. They had also discussed, among the implementing partnership, how to group the issues and questions according to a framework that set the Project's four Intermediate Goals against the Review Criteria of Compliance, Relevance, Participation and Sustainability (but also Efficiency and Effectiveness).

CARE Austria had provided the Project with a guideline for this planning phase, but it was clear on examining the questions that, although they team had broadly understood the task of developing a set of questions for each Intermediate Goal, there were difficulties in framing the questions and, subsequently, in assigning them to the various Review Criteria. There were two real problems: firstly there were too many questions approximately 20-30 per Intermediate Goal including duplicates; and secondly almost all of the questions were directly related to outputs. Many of the

questions could be fitted under the efficiency or effectiveness columns but not under the other Review Criteria - in particular questions related to Sustainability, Compliance and Relevance (except in terms of relevance to target groups) were lacking.

The development of and framing of good questions is difficult and, given that the project staff had not been through this type of process before, it was unrealistic to ask them to follow such a guideline. Moreover, the level of the staff skill sets in using semi-structured interviewing techniques were found to be somewhat limited during the course of the Review so sending staff out with such an open-ended guideline without training and discussion had, in the consultant's view, exacerbated the problem. The Project's Mid-term Review sheds further light on these problems and provides a clear rationale for ensuring that, despite the costs of external consultants, it is critical to have adequate external guidance for "Evaluation" events.

The Mid-term Review was carried out as an internal assessment, with some technical support, in March 2003 but it did not use the log-frame sufficiently as a reference. Methodologically the MTR used checklists and questionnaires - many related to log-frame indicators - to assess the achievement of outputs under the project's Intermediate Goals. Despite examining pertinent issues the analysis largely fails to use this information to address issues beyond the output level and the presentation is rather haphazard. The review includes an interesting assessment of the quality of the project implementing partnerships (Partnership is a key strategic issues for CARE). While the quality of the implementing partnerships is fundamental to the project's success, effectiveness and, ultimately, its potential impact, this factor is not reflected anywhere in the log-frame and the MTR fails to make the appropriate linkages to project design and relevance. Partnership should have been captured in a project assumption to make the linkage. The project rightly recognised the importance of the issue but the MTR fails to make full-use of the information available and the recommendations are largely pitched at the output and the practical management levels. Overall, the MTR is a monitoring summary report rather than a detailed review.

This feature of the MTR document is relevant to the discussion on the Key Questions methodology because it indicates that the Project's analytical skills are focused at the output level. This is normal for projects unless there has been considerable awareness developed regarding project design and the application of the logical-framework tool beyond the usual annual work planning and monitoring activities. Such awareness is difficult to create because ultimately the project-staff remain accountable for delivering the outputs, and everything they do focuses on (through planning; monitoring and reporting) progress towards achieving activities and outputs. So unless project-staff are guided towards considering the significance of the higher-level evaluation criteria; the relationships within hierarchy of objectives and the broader project design issues from the start and they perceive their relevance to their own jobs then these aspects tend to remain remote. The consequence for using a methodology like the Key Questions methodology, which depends on an understanding of the broader issues, is that unless it is clarified that project staff comprehend these issues fully or they have strong guidance for the planning stage (Box 1) then they are being set up to fail.

In this particular instance, CARE Austria and the Project agreed to disregard the key questions which had been developed, rather than attempt to integrate them into the revised process - which did not require them.

Box 2: METHODOLOGY FOR THE REVIEW

The methodology was based on three stages in which the consultants acted as facilitators:

Stage 1: A set of facilitated discussions for key stakeholders of a representative sample of participating villages and the three implementing organisations (DCCFF, CARE and JECA) to assess the project achievements from their perspective and to make recommendations for the post-project environment. The details of the individual discussions are shown in Annexes 5 -13.

Stage 2: A workshop for the project's implementers to assess the Project's **Effectiveness** - essentially a facilitated self-evaluation of the achievement of the **Intermediate Goals** using the indicators defined in the project logical framework. The workshop process and discussions are documented in Annex 14.

Stage 3: A multi-stakeholder forum in which the results of Stages 1 and 2 are discussed and **Lessons Learned** agreed, followed by a facilitated self-assessment of the Project's **Impacts** (using social, economic, institutional and environmental categories). The workshop summary is presented in Annex 15.

Key Issues:

- **Selection of a representative group of villages** from the 8 Core Villages and the 8 Wider Villages that have been part of the Project since the start of Phase III. Criteria were provided for the Implementation Team to choose two villages from each of the core and wider groups. The stipulation was that one village from each group should be considered easy to work with (a project success) and the other should be difficult. There was then scope for two extra villages that enabled the review to include special circumstances. The resultant sample frame comprised the following 6 villages:
 - Pete (Core Village, major beneficiary of revenue from Jozani, also income generation activities, marked attitudinal change since start of Phase I);
 - Ukongoroni (Core Village, less active within project and more difficult to work with, little attitudinal change since start of Phase I; Herbalists resident);
 - Kibuteni (wider village, positive attitude to project);
 - Kizimkazi-Mkunguni (wider village, regarded as difficult to work with);
 - Kitogani (Core Village, with a very successful S&C scheme and Herbalists resident); and
 - Nungwi (located outside of the JCBCA, but brought into project because of critical fuelwood issues, but Project unable to make an impact)
- **The opportunity to involve specific user groups e.g. herbalists was lost** because of time constraints
- **Developing the process and translating the open-ended questions for the facilitated Stakeholders discussions.** A training day was set aside to develop and discuss the questions and the process for Stage 1. First it was agreed to establish meeting norms and the Phase III time-frame in discussions by asking villagers to list the activities of Phase III - this was important for Core Villages that had been part of the project since 1995. Groups would then be asked to list their achievements in this period and then be asked "what could they do differently in the future" if they had identified lessons these were also recorded. Reaching agreement on the best translation for this short phrase into *Kiswahili*, however, took more than 2 hours with multiple translations back and forth and multiple versions to convey the right meaning. Care always needs to be exercised when there are issues of translation and the time required for this should not be underestimated.
- **Selection of the participants to represent the stakeholder group in the Multi-stakeholder workshop** took more time than anticipated. This is attributable to both the seriousness with which Zanzibaris approach all issues of voting and the importance of the Project.

Summary

The methodology developed combined both the first objective of self-evaluation for the project and its stakeholders, and then layered an external evaluation on top of this process. It used a carefully sequenced process of stakeholder meetings and workshops to draw out of the process, within a two-week period, a comprehensive self-assessment of

- Project impact;
- Future sustainability;
- Lessons learned and examples of best practice; and
- Recommendations for the post-project environment.

The 3 stages of self-evaluation represent a stand-alone assessment of the Project by the stakeholders and they provided a rich source of information for the evaluators to make an independent assessment for the element of external evaluation.

The process was intensive and would have benefited from at least a further week to make the documentation process less rushed and to have given a little more time to the two workshop processes. Ideally the Log-frame workshop would have had two days and the Multi-stakeholder workshop would have benefited from a third day. This would also have provided an opportunity for the consultants to devote some time to policy review and background reading, both of which were lacking. Finally a more suitable time frame would have facilitated the inclusion of specific interest or user group meetings as part of the first stage - possible groups to have considered would be: herbalists, hunters and charcoal burners women, farmers receiving compensation from the retention scheme and S&C group members - and then seen them more clearly represented in the Multi-stakeholder workshop.

Annex 4: Logical Framework:

Jozani-Chwaka Bay Conservation Project (Revised December 2000)

Hierarchy of Objectives	Objectively Verifiable Indicators	Means of Verification	Assumptions	Supported By
Final Goal: The income and environmental security of 5,000 households in Jozani-Chwaka Bay Conservation area is enhanced, while biodiversity flourishes.	-Change in household income, using community generated proxy indicators. -Change in biomass and biodiversity	-Household survey reports -Biomass assessment reports		Ford GEF Austria McKnight
INTERMEDIATE GOALS (IGs)				
IG1: Communities around the Jozani-Chwaka Bay Conservation area manage natural resources effectively	-Level of adherence to natural resource management plans developed -Role of Shehia governments in facilitating community forest management	-Survey reports -Field officer reports	Human population will not dramatically increase to a level beyond carrying capacity of natural resource base	GEF Austria
IG2: The Zanzibar Department for Commercial Crops, Fruits and Forestry implements enabling policies and provides adequate support to communities for effective community based natural resources management	-% of generated tourist revenue retained for use by participating communities -Level of community participation in management decisions of DCCFF	-Revenue retention records -Household survey reports	Government of Zanzibar will operationalize policies such as retention of tourist revenues, once developed	GEF Austria
IG3: Communities around Jozani-Chwaka Bay Conservation Area develop and implement environmentally friendly on-farm and off-farm income generating activities (IGAs)	-No. and type of environmentally friendly businesses established -Amount of products and services sold (including crops) -Proportion crops consumed vs. sold -No. of women and men owning and operating on/of farm enterprise activities -Change in incidence of illegal/unsound forest use and hunting	-Field officer reports -Community marketing association/group records -Field Officer reports -Timber and hunting monitoring reports		Ford Austria McKnight
IG4: JECA effectively supports communities to manage natural resources and income generating activities	-Percent of households who say that they receive significant support from JECA in natural resources management and/or small business management -JECA's role in mobilizing community NRMPs -Percent of community members who know role of JECA and who VCC members are	Community survey report	-GOZ releases 48% of tourist revenues to communities who will support JECA financially	GEF Ford Austria

OUTPUTS AND ACTIVITIES

Intermediate Goal 1: Communities around the Jozani-Chwaka Bay Conservation area develop community based natural resources management programmes and manage natural resources effectively

Hierarchy of Objectives	Objectively Verifiable Indicators	Means of Verification	Assumptions	Supported By
1.1 Community capacity to manage and plan use of natural resources is increased	-Percent of households in villages who have participated in natural resource training and/or development of management plans (participation disaggregated by sex) -Change in level of awareness on topics within the education programme	-Community survey report -Community survey report	Communities can control resource use by outsiders	GEF: Complete process in Jozani communities Austria: Initiate/carry out process in new "wider Jozani" villages, Nungwi and Ngezi
Activities:	Conservation awareness raising (drama, video shows, discussion etc.) at community and Shehia government levels			
	<i>Conduct training on forest management at community and Shehia government levels</i>			
	<i>Campaign to inform communities of government- community management programme</i>			
	<i>Establish/complete Forest Management Plans for sustainable use of forests</i>			
	<i>Facilitate development and strengthening of, and record the community integrated protected area patrol system</i>			
1.2 Mechanisms for resolving conflicts between government and communities in place	-Change in levels and types of conflict in natural resource utilisation among communities -Shehia boundaries demarcated	-Community survey and Field Officer reports -Maps		
Activities:	<i>-Form an advisory board and procedures for resolving natural resource and boundary conflicts</i>			
	<i>-Identify/agree on village boundaries</i>			

Intermediate Goal 2: The Zanzibar Department for Commercial Crops, Fruits and Forestry implements enabling policies and provides adequate support to communities for effective community based natural resources management				
Hierarchy of Objectives	Objectively Verifiable Indicators	Means of Verification	Assumptions	Supported By
2.1 Jozani is gazetted as a National Park under legislation	-Status of National Park Act in House	-Gazettment document and status reports		GEF
Activities				
<i>-Follow up with Ministry of Agric, livestock and natural resources</i>				
<i>-Demarcate park boundary</i>				
<i>-Draft mgt plan and budget reviewed and approved</i>				
<i>-Continue to develop the status of Jozani as a legal protected area including a submission as a biosphere reserve</i>				
2.2 Operational legislation and policies appropriate to conservation and development in the Jozani-Chwaka area advocated	-Percent of community members aware of, understanding, and participating in development of relevant legislation -Transparent system for distribution of shared revenues into community development funds established	-Community survey report -System document		GEF, Ford
Activities:				Ford
<i>-Develop advocacy plan for revenue retention and sharing</i>				
<i>-Hold meetings, workshops with and prepare discussion papers for appropriate institutions and stakeholders on policy issues</i>				
<i>-Improve implementation of approved system for the use of Jozani revenue for management purposes</i>				
<i>-Develop Jozani Community Development fund as a legal entity, with potential to grow to a national level</i>				
<i>-Awareness raising among communities on legislation issues</i>				
<i>-Work with department of lands and environment over gazetting the sustainable use area</i>				
2.3 Financially, socially, and ecologically sustainable protected area management systems and infrastructure in place	-Extent to which JCBCA Management Plan is operational -No. community members accessing low impact use zones and types of resources acquired	-Management plan progress reports -Community survey reports		
Activities:				
<i>-Facilitate implementation of JCBCA Management Plan</i>				
<i>-Develop agreements with Jozani adjacent communities over the use of low impact use zones within the periphery of Jozani-Chwaka Bay Conservation Area</i>				
<i>-Develop eco-tourism services plan</i>				
<i>-Develop Jozani headquarters' infrastructure, staff housing, office and research facilities</i>				

Hierarchy of Objectives	Objectively Verifiable Indicators	Means of Verification	Assumptions	Supported By
2.4 Conservation and recovery plans for Ader's duiker, Zanzibar Red Colobus and other rare species implemented	-Implementation of recovery plans	-Recovery plan progress reports		
Activities:				
	-Refine Ader's duiker conservation and recovery plan			
	-Develop a conservation and recovery plan for Red Colobus and other species			
	-Develop partnerships for implementation as necessary			
	-Develop a list of other rare species and their conservation needs			
2.5 DCCFF understanding of biodiversity and natural resource status, use and threats improved and strategies for enhanced conservation identified	-Knowledge on biodiversity and priority areas for conservation threats or issues affecting JCBCA and strategies integrated into project design	-Staff survey report		GEF Austria
Activities:				
	-Carry out biological inventory for Jozani Chwaka-Bay Conservation and Development area for major taxa			GEF
	-Conduct detailed resource use studies on species used form low impact use areas			
	-Compile and carry out research and monitoring into the hydrological regime of JCBCA			
	-Incorporate project research into strategies/plans			
	-Consultancy to carry out research on pressure exerted by urban communities for fuelwood; and alternative technologies and fuels available and develop proposal to address in a new project			Austria
2.6 Department staff is better skilled in community based natural resources management and eco-tourism	-Number of trained DCCFF staff and types of trainings held -No. of tourists visiting Jozani and level of satisfaction -Transparency of decision making by DCCFF and community	-Training records -Visitor records -Community survey report		Austria
Activities:				
	-Assess capacity of DCCFF in ecotourism, community based natural resources management and organizational development			Ford
	-Develop and carry out trainings in ecotourism, community natural resources management			
	-Long term training at Master's level for one Department staff in ecotourism			

Hierarchy of Objectives	Objectively Verifiable Indicators	Means of Verification	Assumptions	Supported By
2.7 General management capacity of DCCFF improved:	-DCCFF effectively manages and reports on sub-grants	-Sub-grant reports		GEF, Austria
Activities:				
<i>-Participatory capacity assessments for DCCFF</i>				
<i>-DCCFF staff trained in management (finance, admin, planning, M&E)</i>				
<i>-Facilitate development of Zanzibar Conservation Areas Management Unit (ZACAMU)</i>				
Intermediate Goal 3: Communities around Jozani-Chwaka Bay Conservation Area develop and implement on- and off-farm income generating activities				
3.1 Savings and credit scheme operating successfully in the Jozani project area	-Number of men and women participating in the savings and credit scheme and no. of CBOs established -Loan repayment rate -Loan sizes and no. of loans issued -Amount of money saved	-Credit and Savings Officer records -Credit and Savings Officer records -Credit & Savings Off. records		Ford
Activities:				
<i>-Carry out a review of the current scheme</i>				
<i>-Promote savings mobilization</i>				
<i>-Assess viability of income generation activities proposed by loan seekers</i>				
<i>-Establish/redefine terms and conditions of loans (as per review findings)</i>				
<i>-Provide small loans to groups with viable income generating plans</i>				
<i>-Track and maintain loan repayments</i>				
3.2 <u>On-farm income generating activities:</u> Environmentally sound and diverse economically viable crop production promoted in partnership with Department of Agriculture and Livestock	-Number of men and women trained in crop production, organic pest control and storage methods -Number and type (cash/food) of new crops introduced -Level of access to necessary inputs by farmers -Types of technology used for farming	-Agricultural Field Officer Records -Agricultural Field Officer Records -Community survey report -Agricultural field officer report		Austria
Activities:				
<i>-Research/assessment of viability and environmental impacts of different crops</i>				
<i>-Facilitate preparation of agriculture development plan for area</i>				
<i>-Agricultural training and extension in production of selected crops, organic pest control, and storage methods to Agricultural staff and community members</i>				
<i>-Facilitate access to seeds, tools and inputs necessary for agricultural production</i>				

Hierarchy of Objectives	Objectively Verifiable Indicators	Means of Verification	Assumptions	Supported By
3.3 Off-farm income generating activities: Small viable off-farm income generating activities (including eco-tourist services) promoted	-No. of eco-tourist businesses established and people involved -Amount of profit generated from each business	-Enterprise officer records -Entrepreneur survey reports		McKnight, Ford, Austria, GEF
Activities:				
<i>- Participatory feasibility studies of appropriate activities explored eg restaurant at Jozani, boardwalk/ bird sanctuary, seaweed farming, oil palm processing, etc.</i>				
<i>-Conduct cross-visits or visits of successful local entrepreneurs to serve as role models</i>				
<i>-Provide technical training to small business men/women for product development</i>				
<i>-Facilitate identification of sources of and access to materials needed for product development</i>				
3.4 On-and Off-Farm Activities: Business/income generation activity management skills, and awareness of related environmental issues of participating households improved	-Number and type of business mgt. Skills trainings -Number of men and women trained in business management skills and tools -% participating men and women aware of conservation- business links and impacts	-Training records -Training records -Community survey reports		
Activities:				
<i>-Provide business management training, including book-keeping, money management, sales and marketing</i>				
<i>-Investigate conservation/development linkages and impacts with communities</i>				
<i>-Provide business environmental awareness and training</i>				
3.5 On-and Off-Farm Activities: Access to markets and marketability of products improved	-New markets identified and used by community members -Reduction in no. of middle-men needed for marketing goods -Level of quality of products and prices obtained	-Enterprise and Agricultural Officer reports -Participant, market association/group survey reports -Quality assessment reports and market association/group reports		Austria
Activities:				
Facilitate formation of marketing associations for agricultural produce for more direct access to markets				
<i>Link off-farm entrepreneurs with tourist shops or appropriate markets for selling their products</i>				
Develop NGO retail outlets for community products at both Jozani and Misali reserves				
Facilitate participatory quality assessment of agricultural and non-agricultural products and development of on-going quality control processes				
<i>Conduct technical training as needed for quality improvement</i>				

Hierarchy of Objectives	Objectively Verifiable Indicators	Means of Verification	Assumptions	Supported By
Intermediate Goal 4: JECA effectively supports communities in natural resources management and income generation				
4.1 Capacity of JECA in facilitating community-based natural resources management is enhanced	-JECA's role in facilitating community NRMPs	-NRMP progress reports		Austria, GEF
Activities:	<i>-Training for JECA in community based natural resources management and plan development; Shehia wood harvesting and hunting management; and environmental issues</i>			
4.2 JECA's capacity to manage community development funds enhanced	-Community members' level of trust in JECA in managing community development funds	-Community survey report		Ford
Activities:	<i>-Facilitate development of transparent system for community development funds management</i>			
	<i>-Provision of training in savings and credit system management to JECA staff</i>			
4.3 JECA's capacity to train community members in small business management and support marketing efforts is strengthened	-Level of quality of JECA's training of participants in selection, planning and management of Income Generating Activities -Initiatives taken by JECA to promote better marketing for participants	-Training assessment reports -Community survey report		Austria
Activities:	<i>-Provide feasibility assessment training to JECA staff and include them in participatory feasibility studies of income generating activities</i>			
	<i>-Provide training of trainers to JECA staff in business management</i>			
	<i>-Provide training to JECA staff in assisting community members to improve and monitor product quality</i>			
	<i>-Assist JECA staff to identify and link with markets, tourist shops, etc.</i>			
4.4 General management capacity of JECA improved:	-JECA effectively managing and reporting on its activities	Sub-grant reports		
Activities:	-Partners' level of trust in JECA in managing community development funds	Capacity assessment reports		
	<i>-Participatory capacity assessments for JECA</i>			
	<i>-JECA staff trained in NGO management (finance, admin, planning, M&E)</i>			

Annex 5: Kibuteni Self-Evaluation Meeting

Date: 27 April 2003
Facilitator: Abuubakar
Ast. Facilitator: Mwanajuma H. Ussi
Recorder: Saleh K. Khiari

Opening

Sheha opened the session around 10:25.

Purpose of the workshop

The facilitator briefly introduced the purpose of the workshop briefly explaining that we were there to do review of the project activities particularly on the achievement according to the views of Kibuteni villagers.

Introduction

The facilitator started the workshop by introducing himself and then allowed other participants to introduce themselves. 26 participants attended the workshop (Table 1), 4 participants were women.

The Process

The recorder then described the process and how the participants will spend the remaining part of the day.

1. Opening of the workshop
2. Purpose of the workshop
3. Self introduction
4. Selection of chairperson; Norms and rules
5. Identification of the project activities
6. Enumeration of achievements and lesson learned
7. Prayers and lunch break
8. What thing would have been done differently?
9. Introduction to multi-stakeholder workshop
10. Selection of representatives
11. Session closing

Table 1: Participants list

#	Name	Profession
1	Suleiman Khalfan	Sheha
2	Keis Sadik	Chair - VCC
3	Simai Haji Makame	Secretary - VCC
4	Shemsa Hassan Ameir	Vice Chair - VCC
5	Hamad Othman	Village Doctor
6	Pandu Haji Yakub	Councillor
7	Hamza Mwalim	Village Doctor
8	Suleiman Mussa Jecha	Wildlife ranger
9	Kassim Mkadam	Chair - Hunters
10	Juma Juma Ameir	Secretary Hunters
11	Saadi Ameir Dume	Patrol Officer
12	Fatma Khamis	Women rep.
13	Khamis Ali Wazir	Member VCC
14	Maulid Hassan	Member VCC
15	Ali Khamis	Member VCC
16	Hamdani Rashid	Member VCC
17	Thabit Mwalim	Member VCC
18	Mwaka Makame	Farmer
19	Makame Shunda	Wildlife ranger
20	Hassan Msim	Elder
21	Simai Shani	Elder
22	Iman Hassan	Farmer
23	Swahih Keis	Beekeeper
24	Ali Moh'd Haji	Madrassa Teacher
25	Ayoub Mwalim	Elder
26	Nassor Rajab	Elder

Norms and rules

1. Participants should confine them on the theme
2. Before anyone speaks, permission from the chairperson should be sought
3. There should be only one session, sideline discussions are prohibited.
4. Session breaks between 12.30 – 13:30 and continues till the end
5. Smoking is not allowed

Election/selection of the chairperson

Mr. Keis Sadiq current chairperson of conservation committee was unanimously voted as a chairperson by show of hands.

List of Project Activities

The participants listed the following project activities:

- Doing patrols
- Natural resources management
- Boundary identification and marking
- Control harvesting of forest resources
- Use the resources according to plan
- Research on Ader's Duiker
- Training on conservation of natural resources

- Training on wildlife management
- Villagers employment in JECA
- Funds for community development (school)
- Beekeeping activity
- Study tours and cross visits.

Group Discussion on Achievement

Group A	Group B
Started classroom building from DCCFF funds	Employment and bicycles
Funds for purchasing medicine	Obtained money
Employment of couple of villagers	Increase in Ader's duiker
Increase in Ader's duiker	Opportunity to visit other villages
Increase income through beekeeping	Increase in honey production
Visits to other villages	Delineation of use and protected zones
	Income generation through fines and fees
	Income generation through hunting fees.
	Availability of medicines in the dispensary

Lessons Learned

- a. Participation in the project activity brought development in the Shehia.
- b. Success in beekeeping requires hard work and perseverance.
- c. If you embark on conservation be ready to solve boundary conflicts.
- d. Sometimes conservation brings conflicts with district authorities.
- e. If you do not conserve your forest it might disappear
- f. After training there is more likelihood of increased income
- g. Conservation protect the natural resources
- h. If you participate in the project one might get an employment

Thing to be done differently

- i. Baseline study should have been conducted in Kibuteni to understand its socio economic stand.
- ii. More emphasis on alternative income generation activities suitable for Kibuteni would have been in order.
- iii. Regular period visits should have been paid to the VCC as well as inspection in the forest.
- iv. The government and not the investor should do conservation of Ader's duiker at Chumbe.
- v. Project should have provided appropriate gears, equipment and tools to the VCC.

Annex 6: Proceedings of Kitogani Workshop

Date: 25 April 2003
Place: Kitogani Village
Facilitator: Abuubakar
Ast. Facilitator: Mwanajuma H. Ussi
Recorder: Saleh K. Khiari

Opening

Sheha opened the session around 10:20 am by reading the letter from DCCFF requesting him to convene 24 people of various backgrounds.

Introduction

The facilitator started the workshop by introducing himself and then allowed other participants including consultants to introduce themselves. 24 participants were present at the workshop, of which 7 were women.

From the participants introductions we gathered the following key groups were present:

The elders, beekeepers, members of conservation committee, members of saving and credit, the sheha and one member, members of handicraft groups and firewood and building merchants.

Purpose of the workshop

The facilitator briefly introduced the purpose of the workshop but emphasized more on the timeframe of the review. He explained we would be reviewing the time since *Bibi Polly* replaced *Bwana*. Robert or from year 2000 to date.

The Process

The recorder was given a chance to describe the review process that would be employed for the day. The process explained as follows:

1. The participants should ask the question why are we there.
2. Listing and agreeing on norms and rules for the day.
3. Enumerating tasks and activities done during the project period.
4. Division into groups
5. Group discussions on achievements
6. Plenary presentation
7. Discussion on things and issues that would be done differently
8. Information on multi stakeholder workshop

In discussing the process it was proposed and agreed that since every sector has two representatives, then each member of a sector must be in one group.

Norms and rules

- 1 The workshop session starts 10:20 – 3:00 with a break between 12:00 – 2:00 for prayers and lunch.
- 2 Before anyone speaks, permission from the chairperson should be sought
- 3 There should be only one session meaning all sideline discussions are prohibited.
- 4 Dozing while session in progress is not permitted.
- 5 Smoking is not allowed
- 6 We should reduce and contain our emotions.

7 Members should observe time.

Election/selection of the chairperson

Bibi Khadija Rajab was unanimously voted as a chairperson by show of hands.

List of Project Activities

The participants listed the following project activities:

- Training on vegetable farming
- Training on saving and credit
- Training on batiks and handicraft
- Collection of ethno-botanical specimens
- Training on mushroom farming
- Conservation of natural resources through VCC
- Leadership training for group leaders
- Selection, Planning and Management (enterprise) training
- Study tours to mainland and local cross visits
- Training on bookkeeping and maintenance of financial records.
- Community development funds – nursery school building
- Bringing together individuals into groups.

Group Discussion on Achievements

Group A	Group B
Through CDF managed to start nursery school	Acquired skills in vegetable farming
Managed to purchase cement blocks	Acquired skills in nursery preparation
Managed to purchase sewing machine	Acquired skills in preparing natural pesticide

Manage to save and opened bank account	Acquired skills in compost preparation
Establish small business	Manage to save money
Formation of various groups	To be able to make the ends meet
Some villagers have become trainers	Got an opportunity to visit several villages
Opportunity to conserve natural resources	To raise funds for marriage
Manage to save up to 70,000/=	To install electricity
The villagers visited various places	To establish small business operation
I managed to buy a farm plot	To obtain and own modern bee hives
Manage to raise up to 470,000/=	Increase quantity of honey harvested
	To own a sewing machine in our group
	To be trained on handicraft making
	To reduce intensity of forest cutting
	Training on conservation

Lessons Learned

- 1 Formation of groups brought strength in doing things rather than doing things alone.
- 2 In a group one can request and obtain various options before opting for one.
- 3 Training is important before embarking on small business operation.
- 4 Do not embark on a new project before training.
- 5 Modern farming techniques brings more success

- 6 One needs a budget and allocate money according to his/her needs
- 7 Conservation means using the resources according to a plan.

Thing to be done differently

- 1 Incorporate activities that involve assistance to parents to alleviate costs imposed on them through schools' contributions.
- 2 Repayment time in JOSACA should be six months as well as interest on loan should be 3 instead of 5%.
- 3 In ethno-botanical specimen collection money incentive should be provided by discoverers of cure for a given disease or ailment.
- 4 In JOSACA instead of having 15 people per group 10 people should be allowed to establish their own group.
- 5 Increase collaboration and cooperation with other institutions and projects with similar activities.
- 6 Jozani farmers compensation scheme should provide fixed amount per months rather than by percentage in six months time.
- 7 Establish mechanism for compensating Colobus monkey damage to other farmers away from Jozani
- 8 Since part of mangrove boardwalk is in Kitogani then create mechanism in which part of the proceedings is given to Kitogani.
- 9 All farmers listed as farm owners around Jozani Station must be given their dues at the same time.
- 10 Job opportunities in Jozani Forest must be distributed equally to all villages that from Jozani and Chwaka Bay Area.
- 11 Setting aside a vehicle for VCCs to cater for transporting confiscated and illegal cut forest products.
- 12 Beekeepers and honey collectors should have been provided with modern protective gears in addition to modern hives.
- 13 Provision and building of office for women involved in handicraft products as well as building of an office at Kitogani as beekeeping association headquarters.
- 14 In JOSACA three shares are not enough a minimum of four is more appropriate.
- 15 Funds from CARE for JOSACA should be actually given to the groups instead of showing them.
- 16 Cross-visits and study tours should be distributed and involve all sectors and project programs.
- 17 Correct or change the design of JOSACA shares books to accommodated the money deposited or withdrawn.
- 18 JECA motorbikes would have stayed in the villages instead of being used the JECA office.
- 19 Before any new activity is introduced, undertake appraisal and market research.

Annex 7: Kizimkazi-Mkunguni Village Self Evaluation

DATE: 27/4/2003

Self-Introduction by Project Staff, Evaluator and Observers.

1. Mrs. Rose Matovu CARE Tanzania, Dar es Salaam, Observer.
2. Mr. George Mkoma CARE Zanzibar.
3. Mr. Hamza Rijal - Local Consultant.
4. Amina Omar Observer (DCCFF).

Tasks 1 and 2: Review Project activities for the period starting year 2000 and Project achievements in this period

Group 1

The village indicated the importance in the conservation of the village forest (Community conservation). They specified that complete closure of parts of the forest was achieved in order for the forest resources to be sustainable.

No other activities were described as part of the advice.

Group 2

Achievements were:

The village community got advise on community Forest Conservation.

The village has prepared the community forest management plan as follows:-

- Machomwe and Rasi Usine have been totally closed (Year rotation).
- Pange area has been left free for use, charcoal, firewood, lime extraction and agricultural use. Hunting is restricted except for exceptional; permits given to individuals by the village Environmental Committee.

Task 3: What could the community do differently in the future:

Group 1

Future Plans

1. Awareness raising in forest conservation should be encouraged so that the communities understand the advantages and disadvantages of conservation activities (through meetings and village cross visits)
2. The forest resource use permits should be obtained from Sheha in order to avoid disturbances.
3. In order to sustain conservation activities in the village, the village needs to be assisted in the production of force seedlings.
4. Most of the communities depend on the forest products for their livelihood. The villagers are requesting to be assisted with IGA. (eg. Savings and Credit).
5. Improved bee-keeping activities have to be introduced the community.

Group 2

Future Plans

1. Community village Forest Conservation should be implemented as planned. The forest conservation staff from Jozani have to facilitate the implementation of the Community Forest Conservation.
2. Alternative activities (IGA) including savings and credit activities should be implemented at village level.
3. Village tree-planting to be encouraged by introduction of fruit and free nurseries.
4. Forest experts from Jozani should be encouraged to visit the village from time to time.

5. Improved agriculture production should be implemented through making of bylaws finding ways of ensuring:
- Vermin control
 - Pesticides.

Patrols of the community forest should involve all villagers (not involving the Government forest guards alone).

Lesson Learnt:

The community accepted the advice given to them on community forest conservation. But the facilitators who came from the Jozani Project never made any follow-up to the community after their facilitation.

The community feels that there is a great need of the facilitators to come back and continue the process at this village.

Annex 8: Nungwi Village Review

Date: 27/04/03

Facilitator: Sheha

Recorder: Is-hak

1. Introduction:

Name of participants

1. Khamis Machano

2. Shekha Darusi

3. Machano Ussi

4. Haji Makame

5. Gulam Vuai

6. Haji Ali

7. Ame Khamis

8. Kombo Bakari

9. Ali Juma

10. Makame Juma

11. Kombo Ussi

12. Juma Haji

13. Asha Suleiman

14. Kizingiti Kombo

Role

Chairperson/ VCC

Farmer

Carpenter

Fisherman

VCC

VCC/Fisherman

VCC/Farmer

Village elders committee

Seaweed farmer

Carpenter

Fisherman

Fisherman

Petty businesses

VCC

2. Activities carried out through the project since 2000 (Phase III)

- Education on conservation
- Establishment of nursery
- Forest and sea shore conservation
- Cooperation between different VCCs

3. Achievements:

1. The community has acquired knowledge on forest conservation although the knowledge has not yet been fully implemented because of grazing animals in new forest plantation areas
2. There are few new farmers that have planted forest plants in their fields
3. The group that engaged in nursery activities raised 3000 seedlings in this season and they have started to sell the seedlings, so the group is earning some money.
4. Cross visits that were organized for VCC have enabled them to learn and exchange views and ideas with other villages on forest conservation issues.
5. Conservation of coral reef
6. They have managed to reduce animals that destroying their crops (vermin's)

4. Lessons learned:

Cooperation among all stakeholders concerned will bring fruitful outcome and development

5. Things that will be done differently in the future:

1. DCCFF staff should provide technical training and advisory service regularly

2. Neighbouring villages with Nungwi should be trained on forest conservation so as to reduce destruction of forest in their areas and in Nungwi village because they remain with little natural resources
3. Conflict resolution between villages should be given first priority
4. Training on conservation should be provided to the whole community rather than to concentrate to the VCC only.
5. The VCC should get more support from the central government and cooperation from institutions deals with public security.
6. VCC should have election of leaders after every 3 years
7. The VCC and community should participate and involved fully in the planning and implementation strategies of the activities.

Annex 9: Pete Village Self-Evaluation Meeting

DATE: 25/4/2003

Participants

Azizi Abdalla Vuai	-	Secretary, VCC – Pete/ Chairman JOSACA.
Mussa Haji Mussa	-	Beekeeping – Local Healer.
Ibrahim Juma Choum		Farmer
Unnamed		Livestock keeper
Makonda Isac		Hunter
Pandu Simai Sheha		Farmer
Unnamed		Wood cutter
Unnamed		Wood cutter

Implementation Team

Rose Matovu		Misitu Yetu – Observer
Hamza Rijali		Department of Environment – Evaluator
George Mkoma		JCBCP, Facilitator
Amina Omar		JCBCP (Conservation Education Officer), Facilitator
Makame Kitwana	-	JCBCP (Conservation Officer), Recorder

Introduction.

Self-introduction, purpose of the meeting and agreement on meeting schedule presented by Mkoma, George

Meeting Schedule & Agreed Arrangements:

Participatory review of the project activities for the last phase – from last.
Norms and meeting arrangements
There should be a Chairperson: Mr. Ramadhan Moh'd was elected
Time of the meeting should be from 11:00 a.m – to the end of last agenda
(infinity):

Prayers: 12:30 p.m - 1:15 p.m.

- Contribution and emergencies should be via chairperson's permit
- *Mpasho'* should congratulate contributors

Task 1: Review Project activities for the period starting year 2000

Participants were divided into two groups.

Results:

Handcraft Activities:

- Baskets (*mikoba*) and caps (*makawa*) making
- Batik preparation
- Doormat making

Training: Livestock keeping

Agricultural Activities:

- Training: Mushroom farming and improved banana farming
- Training: Preparation of farmyard manure

Hunting

Savings and Credit Scheme

- Group formation
- Enterprise training and development
- Search for markets

Natural Resources Conservation

Training on and Bee-keeping

Digging of pit latrines for villagers (came after community realisation on Environmental Conservation)

Enterprise development training

Training on fruits and tree nurseries

Environmental conservation activities:

- Mangrove planting
- Cross visits
- Natural Resources Conservation Agreements
- Improved relationship with DCCFF

Special training for community trainers on "Savings and Credit"

Groups training on "Savings and Credit" by local trainers

Groups' leadership training

Task 2: Project achievements in this period

The same groups were used as in task 1. Project achievements for this phase were:

Group Presentations – group (a)

Various individual private businesses were initiated – examples include: Shops, restaurants, fuelwood selling (firewood and charcoal), livestock keeping and retail business between isles and mainland Tanzania. Women businesses were also started - basket, caps, batiks, and doormats.

Beekeeping activities by individuals and groups were conducted. Honey and wax harvested and sold.

Tree nurseries owned by individuals and groups are in place. The groups sell fruits and tree seedlings. Individual farmers plant these in their private farms.

Communities construct and use better pit latrines.

Sustainable Natural resources management Plan for the Village forest is under implementation. For the state managed forest, the community is involved in management and receives certain amount from harvesting fees (9 villages are involved). Planted mangroves are still young to harvest, cross visits among communities improve conservation understanding.

DCCFF has maintained better relationship with communities than before.

The community has taken up mushroom farming, thus mushroom has become a source of income (IGA).

About 60% of the community is currently involved in improved banana farming.
Banana has improved community incomes.
About 50% of the community is involved in preparation and use of farmyard manure.
The manure has improved fertility in the farms.
Savings and credit training is provided free by available local trainers in villages.
There is strong group leadership in the village.

Summary of achievements (Group a)

Increased income through different businesses and handicraft activities,
Available conservation education through cross visits– nurseries in place,
Good relationship between DCCFF and community maintained – was not in place before,
Improved Biodiversity through mangrove planting,
Preparation of Village natural resources management plans and agreements,
Adoption of improved agriculture as an alternative sources to wood-cutting – 60% are banana farmers, mushroom farming and about 50% use farm yard manure,
Available knowledge on saving and credit with in the village vicinity.

Group Presentations – group (b)

Improved livelihood services through handicrafts e.g. educational, food security and clothing.
Understanding livestock problems (diseases) and treatments. Income as well as livestock condition has improved.
Improved livelihood through agriculture as well as increased skills on agriculture, thus getting better yields, acquire savings at bank and pay for school fees and other services.
Identified wildlife conditions to hunt e.g. be able to differentiate pregnant from non-pregnant, young animals from old ones, hunting periods as well as timing for crop raiders and wild meat.
Community has managed to save certain amount through savings and credit scheme, some members started new petty cash businesses for easy family conflict resolution and maintaining good relationship among villagers.

Under conservation activities we have achieved the following: -

- Prevented beach erosion,
- Increased fish catch,
 - Improved weather condition,
 - Understand sustainable development,
 - Understand better land use and allocation, and
 - General community (village) development.

Achievements through beekeeping: -

- Easy access to better bee products, especially honey as a result of increased harvest
- Increased income through bee products

Construction (digging) of pit latrines

- Sustain better health
- Maintain village status

Understanding of better businesses

Summary of achievements (Group b)

Improved livelihood – educationally, food security and clothing,
Increased alternative and knowledge of income generating activities – e.g. livestock keeping and treatments,
Improved hunting knowledge by knowing what kind of animal to hunt at what time,
The village has acquired general development by getting the following services: -

- Clean water – dug out wells,
- Mosque,
- Nursery and Primary schools,

- Electricity and contribution to new water project by TASAF (Tanzania Social Action Fund)

Increased ability to solve monetary problems,

Improved relationship between villagers,

Improved conservation ethics through beach erosion control, increased fish in the mangroves and appropriate land allocation for better uses.

Acquired modern beekeeping knowledge and wax preparation,

Understanding better businesses to engage with – there is reliable market for these products.

Improved market procedures for handicraft products.

Task 3: What could the community do differently in the future:

The same groups were adopted for task 3

Group Presentations - Group (a)

To avoid delays in loan payment, repayment period should be increased

Increase the rotation period for the groups and if possible the groups should be permanent

To improve agricultural activities, the groups should be avail to the water pumps, through different mechanisms as loans, in order to be able to farm all the year round rather than depending on rain.

Provided with the agricultural inputs and chemicals for vermin and other wild animals
Facilitate community understanding on wise use and allocation of land through village Natural resources Management Plan.

Educate non-beekeeping groups to respects beekeeping gears and understand that beekeeping is also an approach to conservation.

Community allowed to carryout beekeeping activities within the proposed National park through modern beekeeping.

Assist village to come up with the tourism project at historical site of Machaga Cave.

Group Presentations - Group (b)

The government should assist the community to construct more pit latrines.

The government by collaborating with TASAF should look for the possibility of completing the established water project in the village as the village conservation fund has already contributed some amount of money (2,200,000/-)

Conserve environment, improve community livelihood at family level. Look for better livelihood alternatives to suit for individuals.

Establish special group in the village to deal with the selling of livestock drugs.

For loan repayment, there should be preparation time before actual repayment starts.

Representation to the Multi-stoke holder Meeting - *Mwanyanya*

The following were selected to represent Pete Village: -

Isac Makonda and Azizi Abdalla Vuai

Annex 10: Ukongoroni Village Self-Evaluation Meeting

Date: 25/04/03

Facilitator: Sheha

Recorder: Is-hak

Participants

1. Salma Mkenge	VCC
2. Marim Haji	Seaweed farmer
3. Asha Ushenza	Seaweed farmer
4. Mwamvua Amour	Seaweed farmer
5. Mwatima Mtumwa	Seaweed farmer
6. Mtumwa Ali	Seaweed farmer
7. Asha Shauri	Seaweed farmer
8. Amini Mwita	Farmer
9. Nyezuma Haji	Seaweed farmer
10. Am Hakiba	Seaweed farmer
11. Shinuna Salmini	Farmer
12. Laila Mrisho	Farmer
13. Sukena Ali	Farmer
14. Kazija Haji	Seaweed farmer/VCC
15. Mbuka Chum	Seaweed farmer/VCC
16. Rehema Musa	VCC
17. Ame Jecha	Farmer
18. Ali Haji	Farmer/VCC
19. Juma Ali	Beekeeper/VCC
20. Musa Foum	Beekeeper
21. Sudi Mlenge	Farmer
22. Haji Jecha	Farmer
23. Ali Mwita	Beekeeper
24. Awesi Hassan	Farmer
25. Soud Abdulla	Beekeeper/VCC
26. Hassan Ali	Farmer
27. Mohamed Khamis	Beekeeper
28. Suleiman Haji	Beekeeper/VCC
29. Makame Haji	Farmer
30. Maulid Soud	Farmer
31. Sadik Salmin	Seaweed agent/VCC
32. Idrisa Shauri	Beekeeper

Activities carried out through the project since 2000 (Phase III)

- Conservation of Ader's duiker
- Forest conservation
- Disbursement of fund from Jozani revenue
- Mobilization of saving and credit community-based organization (JOSACA)
- Formation of beekeeping association
- The project midterm review
- Mobilization of women to participate in handcraft activities
- Establishment of Jozani National Park
- Cross visits organized for VCC members and JOSACA CBOs
- A plan for forming a saving and credit association
- Developing the village land use management agreement (LUMA)

Achievements:

1. Two persons (Villagers) employed by JECA to deal with conservation of Ader's duiker.
2. The village received TSh.900,000/= from JECA for implementing the activity of conserving Ader's duiker. The money was spent on building a school and teachers house.
3. Ader's duikers have multiplied more because of conserving them.
4. The village now has a good forest (dense forest) and has developed and implementing land use management agreement. Therefore, the village has classified the land in to specific areas for various uses, such as area for cutting poles and firewood, collecting stones for building, making lime and farming area.
5. The women at the village have acquired knowledge on handcraft activities.
6. The village received Tshs. 206,500/= from JECA. The money was spent on distributing water pipes in the village and five tapes were fixed.
7. The village managed to collect money to build Quran school and a building for performing Islamic events.
8. Members of saving and credit CBOs (JOSACA) take loan and they use the money to build houses or invest in agricultural sector and petty business.
9. Income generating activities have increased in the village.
10. Formation of beekeeping association has enabled the beekeeper to make plan to harvest honey in a proper sequence and this procedure has helped to boost up the price of honey from Sh. 1500/= to 2500/= per bottle.
11. The beekeeper have acquired knowledge on making bees wax
12. Cross visits that were organized for VCC and JOSACA CBOs have enabled them to learn and exchange views and ideas with other villages on forest conservation issues, savings and credits and income generating activities

Lessons learned:

1. They must be careful on planing and implementing their activities, so when the project terminate they will be able to sustain implementing their activities
2. The village should have a good leadership
3. They must plan their activities properly and this should involve forest conservation

Things that will done differently in the future:

1. Loan repayment from JOSACA should be after 6 months instead of 3 months. This is because 3 months is a very short period to invest in agriculture
2. Contribution of shares in JOSACA should be increased, as well period of contributing shares should be extended so the members can get a big loan
3. The VCC should be allowed to collect revenue for the resources obtained from the village so that it can sustain it self. According to the government system a special office in the district concerned collects the revenue.
4. There is a need to conduct research to monitor adaptability and multiplication of Decker's duicker at isolated area, such as in an islet. This will make conservation of this animal to be more effective.
5. There is no reliable market for selling honey and beeswax. Therefore, there is a need to establish a market at Jozani so the tourists can buy bee products.
6. The whole community should be trained on various issues rather than concentrating on VCC and community leaders only, and then to use them to disseminate the information or package to them.
7. There is a need for the community forest to have village forest guards.
8. Women should get more training on hand craft activities.

Annex 11: Stakeholder Review: Department of Commercial Crops, Fruit & Forestry (DCCFF) Staff (28/04/03)

Facilitator: Sheha

Recorder: Is-hak

1. Introduction: Names of participants

1. Sheha Idris
2. Soud Mohamed
3. Rashid Khamis
4. Mwajuma Haji
5. Ali Juma
6. Ali Abdulrahim
7. Is-hak Mohamed
8. Makame Kitwana
9. Mwinjuma Saleh

2. Achievements:

1. Reduced pressure on illegal wood-cutting
2. Reduced dependency on forest conservation. This is because of:
 - Alternative sources of income generating activities
 - Conservation education
3. Improved capacity of DCCF on resource management.:
 - Capacity building up through workshop, meetings, study tour, cross visits, long and short courses, and study tour
 - Provision of advisory service
4. HIV main streaming
5. Secured retention scheme. 80% revenue retention, This contributes to:
 - Sustainable management
 - Community development
 - Change of attitude
 - Compensation
6. Jozani Chwaka Bay National Park
 - Notice of intent is ready
 - National protected area board is ready
 - National and international recognition
 - Improved conservation status of biodiversity (flora and fauna, and rare species)
7. Endorsement of resources use agreement
 - Community has been empowered
 - Policy of DCCF has been implemented
8. Approved wildlife bylaws empowering VCCs.
9. Increased ecotourism revenue for Jozani
 - Increased attraction features
 - Well trained guides
10. Infrastructural development for Jozani:
 - Research house
 - Staff houses
 - Herbarium

Lessons learned:

1. Implementation of memorandum of understanding is extremely important to project success
2. Community can do and implement their own things
3. Things that will be done differently in the future:
 - Improve coordination at all levels
 - Field staff with immediate supervisors
 - Between partners
4. Improve advocacy between stakeholders
 - Politician
 - District authorities
 - NGOs
 - Community
5. Short-term contracts, which are within the capacity of the partners, should be offered to them
6. There should be no policy hindrance
7. Consultants should be clear and transparent to all parties
8. Farmers enumeration should be reconsidered for their time
 - Meetings/workshop
 - Field work
9. Priority should provide capacity building to staff and other project stakeholder for the sake of project sustainability. This can be through:
 - Long courses
 - Short courses
 - Farmers cross visits
10. Improve marketing and transformation of income generating activities
 - Information sharing
 - Improve value adding on designing and packaging

Annex 12: CARE Self Review (Mapitio) 27th April 2003

Achievements

- 1) We have managed to advocate for the retention of Jozani revenue
- 2) Managed to support DCCFF in implementing the retention scheme of Jozani revenue
- 3) Managed to empower communities adjacent to protected area in addressing livelihood security and conservation issues
- 4) Able to work in partnership arrangement while addressing issues of transparency, accountability respect and commitment.
- 5) Successfully built up capacity for partners in areas of professional development, finance handling, budgeting and planning etc
- 6) Built institutional capacity for JECA, VCC & CBOs
- 7) Facilitated the establishment of VCCs and CBOs in wider areas
- 8) Managed to establish savings and credit scheme that is running sustainably in project area and wider area
- 9) Managed to make target people realise the linkages between conservation and development
- 10) Managed to facilitate and establish alternative income generation activities to communities adjacent to forest
- 11) Reduced hostility between monkeys and communities living adjacent Jozani forest
- 12) Facilitate Advocacy process towards declaration of Jozani forest as a national park
- 13) Train community members in business management skills and marketing
- 14) Assist DCCFF in Jozani infrastructure development

LESSONS LEARNED

- 1) The use of well trained CCPs (Community Contact Persons) has reduced workload of project staff and enhanced sustainability (savings and credit - training)
- 2) Successful implementation of Livelihood Security Projects require substantial investment with longer periods of implementation of at least 5 years
- 3) Tripartite arrangements of the project have smoothed the implementation of activities by each party being owner of the process
- 4) Benefit-sharing with communities and negotiations should be a continuous process - income sustainable
- 5) If no genuine benefit package hostility will emerge.
- 6) Once you empower community in one area, it exerts powers on other areas of development (e.g. Kitogani versus fire brigade)
- 7) Investment in long-term professional development for partners reduces external dependency on technical staff.

What should be done differently?

- 1) CARE to gradually move into provision of services through CCPs instead of direct implementation
- 2) Loans given to non-savings and credit groups should be channelled through savings and credit CBOs

- 3) Gender equality in participating in various activities at community level with more emphasis on holding higher leadership positions
- 4) Specific focus on poor needs to be increased.
- 5) *It is high time for CARE Tanzania to begin withdrawing from implementation in relation to conservation by handing over full responsibilities to DCCF and JECA. This is in the interests of institutional sustainability. CARE will continue to provide support as requested. [Not presented]*

Annex 13: Proceedings of JECA Self-Evaluation Review

Date: 28 April 2003
Place: JECA offices
Facilitator: Saleh
Ast. Facilitator: Rose

Opening

The Facilitator opened the session around 10:30.

Purpose of the workshop

The facilitator briefly introduced the purpose of the workshop briefly explaining that we were there to do review of the project activities particularly on the achievement according to the views of JECA staff.

Facilitator informed the participants that they should confine themselves to the period after Robert Wild left and Polly Dolan took his place. This essentially means from 2000 to-date.

Introduction

No introduction took place since the participants were staff known to one another. However, the new person Ms. Rose was introduced as an observer.

The list of participants and their section are shown in the table below

	Name	Profession
1	Ali Yussuf Mkanga	Agriculture Officer - JECA
2	Abdulla Ashrak Makame	Wildlife ranger Mtende
3	Daudi Iddi Mchezo	Gift Shop Manager
4	Mpemba Ali Mwinyi	Wildlife ranger Mtende
5	Said Abdulla Abdulla	Wildlife ranger Mtende
6	Simai Ame Simai	Conservation Officer
7	Abdulla Hamad Salim	Accountant
8	Khamis Abdulla Abdulla	Wildlife ranger Ukongoroni
9	Salum Sadi Ali	Wildlife ranger Charawe
10	Ilyas Khamis Haji	Secretary - JECA
11	Makame Ramadhan Mcha	Wildlife ranger Mtende
12	Sharifa Ali Khatib	Cashier

The Process

The facilitator used the following process to aid the discussion:

- Clarify purpose of the workshop
- Description of the review vis-à-vis evaluation
- Enumeration of achievements and lesson learned in groups
- What things would have been done differently
- Introduction to multi-stakeholder workshop
- Selection of representatives
- Session closing

Group Discussion on Achievement

Group A	Group B
JECA successfully supervised community development projects in the Shehias	Creation of employment
JECA successfully managed community development fund for Shehias.	Establishment and operating saving and credit scheme through JOSACA
JECA lead and facilitated VCCs	Provision of training in various areas
Capacity of Building of community members through JECA	Training on computer use and English course, registry, book and record keeping.
Creation of employment in the villages	Through loans people have prospered.
Unification of 9 Shehias under the banner of conservation.	
Creation and provision IGAs	
Motivating the communities towards conservation of natural resources.	
Capacity building through training on SPM, irrigation, vegetable farming and bookkeeping.	

Lessons Learned

- 1 For changes to happen in the villagers' time and patience is required.
- 2 Three months is a short period to pay back the loan.
- 3 Many community members have low education level to be upgraded.
- 4 Rules, guidelines and norms reduce conflict in JOSACA scheme.
- 5 Good book and record keeping is necessary
- 6 Involvement of women in various activities and groups improved their confidence.
- 7 Given the same resources, still the villages differ in awakening and development initiatives.
- 8 Project activities stimulated development in the villages.
- 9 Natural resources do not have to be managed by the government alone, communities can also do it.
- 10 Effort and *voluntarism* is necessary for the success of conservation.
- 11 Community members are really motivated when it comes to community development projects.

Thing to be done differently

- 1 The allocation of 80% revenues should have been done in the presence of all partners.
- 2 Payback period for JOSACA loans would be extended to six months period
- 3 Put more effort in long term training for the community members with qualifications.
- 4 Build capacity of JECA in all areas of project components.
- 5 Resource allocation for the components would be done jointly.
- 6 Inventory and state of natural resources to be done before community is given mandate to manage their resources.
- 7 Lobby and advocate for energy policy as well lobby the government to target boarding schools, army barracks and jails for alternative energy sources.
- 8 Set Indicators to assess the JECA goal achievements based on JECA Activities.

Annex 14: Log-Frame Workshop (26th April 2003)

Objective

Implementing partners (DCCFF, JECA and CARE project staff) self-evaluate achievement of the Intermediate Goals (IGs) and Impacts using the indicators specified in the logical-framework (LF).

Methodology & Results

- 1) Discussion of the difference between the self-evaluation according to the logical framework (*tathmini*) and the self-evaluation according to individual stakeholder group values (*mapitio*) to ensure all participants had sufficient understanding of the dual process. Clarification of the role of this exercise in the overall review process.
- 2) Individuals divided themselves into 4 groups according to their involvement in and knowledge of the implementation of the four IGs. They were given 1 hour to make their assessment of what the project had achieved according to the IG level indicators shown in the LF and/or M&E plan if these indicators differed.
- 3) The Results, which were presented by the groups in a plenary, are shown below. Any footnotes are the consultants' notes not the participants' notes

IG1: Communities around JCBCA manage natural resources (NR) effectively Indicator 1: Level of adherence to NR Management Plans Developed (LF Indicator)

- 8 Land Use Management Areas's (LUMAs) at Jozani original villages (Core Area) developed, approved and signed
- One LUMA (Cheju) under implementation (100%), seven are at Government Press for Gazettement Procedures
- However, the respective communities are already implementing LUMAs, in some areas e.g. cutting permits and revenue collection from NR uses
- 8 Draft LUMAs for Jozani wider area villages developed and accepted by the respective communities.
- Drafts submitted to DCCFF for comments for further approval procedures
- However, 5 villages (Mtende, Kibuteni, Muungoni, K/Dimbani and Muyuni) are implementing some practices in e.g. patrol and revenue collection through hunting permits.
- In Nungwi Village, PRA has been conducted and community awareness has developed. Apart from these activities, land ownership is still under traditional management, which is believed to hinder LUMA process. *However, a solution of this problem has been reached between traditional leaders and the VCC. This process will continue.*

Note:Up to this stage there are some conflicts among neighbouring villages particularly over boundaries and resource use¹².

Indicator 2: Role of Shehia governments in facilitating community forest management (LF Indicator)

- A VCC has been established in each project area
- The VCC works on behalf of the community concerned, in relation to conservation activities including patrolling, awareness raising, decision-making,

¹² These conflict areas have been temporarily closed until the conflicts can be resolved

conflict resolution etc. in collaboration with other institutions such as JECA and DCCFF.

- VCCs implement LUMAs in their villages¹³

Indicator 3: Level of productivity versus off-take under Land Use Management Areas (LUMAs) by commercial and domestic use (M&E Plan)¹⁴

- Within Community management areas protection and utilisation zones can be clearly identified
- Protection zones are conservation utilisation zones - these are used according to plans (level of off-cuts has declined).

Indicator 4: Perceived adequacy of NR access by gender (M&E Plan)

- Access to NR are based on people's needs and plans

IG2: The Zanzibar DCCFF implements enabling policies and provides adequate support to communities for effective CBNRM

Indicator 1: Percentage of tourist revenue retained for use by participating communities (LG and M&E Plan)

- 22.4 % of tourist revenue is retained for use by participating communities¹⁵
- The 22.4% is distributed into direct compensation for farmers (40%) and a community development fund (60%)
- Money has been distributed according to the official gazette.

Indicator 2: Level of community participation in management decisions of DCCFF (LF) (Special reference to gender added in M&E Plan)

- At village level (VCC) women's representation is variable, but present
- Participation in the Advisory Committee is not gender sensitive
- Tripartite meetings between JECA, CARE and DCCFF are in place - and there are regular meetings
- Communities participate in design, planning, implementation and reporting. *They participate in the planning and implementation but at the level of decision-making they are not included*
- Conclusion is that major decisions concerning Jozani cannot be implemented without it being passed at the community level.
-

IG3: Communities around JCBCA¹⁶ develop and implement environmentally friendly on-farm and off-farm income generating activities

Indicator 1: Number and type of environmentally friendly businesses established including: products and services sold, number of men and women owning and operating on and off-farm enterprise activities (LF and M&E Plan)

¹³ The Shehia is not a member of the VCC but an advisor to the VCC

¹⁴ Forest inventories are supposed to be carried out before community management begins - to provide a baseline for this indicator.

¹⁵ The division of funds is more complex than it appears. In practice more is returned to the communities than is indicated by this figure. A deduction of 20% is made for the Boardwalk, which is the land set-aside by Pete village and associated tourist facilities, before the revenue calculated and distributed. The Boardwalk money goes towards the Pete community's maintenance and management costs (which includes direct compensation payments to farmers affected by the red Colobus). The remaining 80% is designated as the tourist revenue and it is distributed according to the following formula laid down in the gazette: DCCFF (30%); Treasury (14%); Communities (22.4%) and Jozani Development (33.6%). Jozani Development is effectively the costs of PA management.

¹⁶ JCBCA refers specifically to the original Core Villages and not the wider area

- 25 different Income Generating Activities are established: handcrafts (batik, tie-dye, ukili products and hena painting); beekeeping; vegetable production; mushroom production; petty businesses (oil making, rope, food preparation); restaurants; bicycle repair; livestock keeping (poultry); fishing; retail shops; seaweed farming; nursery (tree and children's nurse)
- Many of these products and services are sold: handcrafts (kili products, batik products, craft making, kofia, khanga bags, T-shirts, sewing); beekeeping (honey and bees wax); on-farm (vegetables, seedling services); mushrooms; business (credit technical services, food services, shop services, tailoring services, bicycle repair).
- The number of men and women owning/ operating on-/off-farm enterprises¹⁷

Enterprise Type	Male	Female	Total
Saving & Credit¹⁸	410	623	1033
Handicraft	5	137	142
On-Farm	554	246	850
Mushroom	62	40	102
Beekeeping	149	51	200
TOTAL	1180	1097	2327

	Male	Female	Total
Training¹⁹	290	533	823

Indicator 2: Change in incidence of illegal forest use and hunting

- Rate of illegal hunting and forest destruction is reduced because 3150²⁰ individuals = 63% of the 5000 target are involved in performing IGAs and also implementation of LUMA in villages
- Cases supporting this statement are: zilizikamatra records and measurements through same detecting changes

IG4: JECA effectively supports communities to manage NR and IGAs

Indicator 1: Percentage of Households who say they receive significant support from JECA in NR management or small business management²¹:

- 22% individuals (target 5000) when measured at Mid-term Review.

Indicator 2: JECA's role in mobilizing community NR management plans

- Imebadilika, na tumefanya kwa vijiji vyote.
- *JECA's role was changed from that of community mobilisation to facilitation²².*

¹⁷ There is duplication of individuals within this table therefore the rows cannot be summed to produce an overall total i.e. each row must be treated as a stand-alone.

¹⁸ The original target for savings and credit was 5000 individuals but this was reduced to 2500 during the revision of the M&E plan and prior to the MTR, thus, the change was endorsed by the MTR. This represents an achievement level of 41% of the target.

¹⁹ This row represents the total number of individuals attending trainings - there may be duplication if the same individual attended more than one type of training

²⁰ This number is the sum of the two tables - there was some debate about it in the wider group - and recognition that it was not a "proper" figure because it contains duplications. Nevertheless, we should note that the wider group agreed that there was a discernable reduction in illegal forest use and hunting.

²¹ Two issues: (i) the target group of Households was reduced from 5000 to 2500 (polly report title) as this target was considered too high. This change was subsequently emphasised during the Mid-term Review and endorsed; (ii) referring to this particular indicator: the target group should have been changed to reflect individuals not households, because JECA has not been supporting households during implementation. Unfortunately the indicator was not revised when the opportunity arose to do this and consequently the project was restricted by the indicator in this workshop session.

Indicator 3: Percentage of community members (VCC, Shehas) who know the role of JECA and VCC Members

- 62% Know the name
- 69% Know something of JECA
- Wastani wa asilimia 50 kwa kila kijiji wanalewa JECA
- 63% wanakubali kwa
- JECA isimamie mfuko was maendeleo ya jamii?.

(check flipcharts here - and English translation)

4) The group was then asked to assign a final score for overall performance for each IG - the scoring system used was:

0 = No Achievement	0 %
1 = Little Achievement	<50%
2 = Partially Achieved	>50%
3 = Almost Achieved	>80%
4 = Completely Achieved	100%

They opted to go back into their groups to (i) agree the score and (ii) provide reasons for the score²³.

IG1: Communities around JCBCA manage natural resources (NR) effectively

Score 4

- All villages have formed VCCs
- VCC participate fully in all conservation activities
- Zoning of different land use has been completed
- All community members have access to NR according to their needs/ plans

Score 3

- Land Use Management Agreement (LUMA) prepared for 8 villages
- Launched in 1 village
- Not launched in 7 villages
- Launching will be done before June 03

Score 2

- Some villages (especially Jozani wider area) are not implementing their plans
- Draft LUMAs are not yet approved and signed
- Information on resource use collected and awareness raised but Draft LUMA not written for some villages
- Other interested institutions yet to be involved

²² As with indicator 1 the change in role was never captured in the M&E Plan (2000) nor was it captured at the final log-frame revision in 2002 following the CARE ICD retreat - but the indicator is essentially redundant.

²³ Groups elected to score individual indicators or in some cases outputs before they could reach a decision on an overall score - they were not instructed to do this as part of the methodology. There was a heavy time investment as reaching a final score took two rounds of discussion. The facilitators note that sufficient time must be built into these discussion processes when a consensus is to be reached if this is what groups want and require.

IG1 OVERALL ASSESSMENT TO TAKE FORWARD TO MULTI-STAKEHOLDER WORKSHOP:

CORE AREA 3 Communities adhere to developed plans, but there are some issues outside of the project's control which still need to be addressed e.g. Gazettement of LUMAs which are on Government Press

WIDER AREA 2 Negotiation process with communities completed, draft LUMA document in place and pilot implementation started, but official endorsement by Government authority is not yet completed

IG2: The Zanzibar DCCFF implements enabling policies and provides adequate support to communities for effective CBNRM

Indicator 1 Score 4

- Money has been distributed according to the official gazette

Indicator 2 Score 3

- Communities are fully participating in planning and utilising their NR
- Regular Planning meetings take place

IG2 OVERALL ASSESSMENT TO TAKE FORWARD TO MULTI-STAKEHOLDER WORKSHOP:

OVERALL RANKING 3

Reasons:

- Money has been distributed to the community accordingly
- Community is involved in NR management and utilisation
- There are regular tripartite meetings between JECA, CARE and DCCFF
- Community is involved in designing, planning, implementing and reporting

IG3: Communities around JCBCA develop and implement environmentally friendly on-farm and off-farm income generating activities

Indicator 1 Score 3

- Businesses are in place
- Households are earning income
- Quality products and good services are produced. Both are reasonably priced and there are markets available
- There is access to capital through savings and credit

Indicator 2 Score 3

- LUMA implementation

Overall More than 1700 community members perform various on-farm and off-farm IGAs to earn income.

IG2 OVERALL ASSESSMENT TO TAKE FORWARD TO MULTI-STAKEHOLDER WORKSHOP:

OVERALL RANKING 3

Reasons:

- The community performs a wide range of IGAs. Approximately 1700 people involved
- Savings and Credit reaches 60% target (Revised target 2500)
- Good Quality products and services produced by community
- Some spread of IGAs and Savings and Credit to the wider community - the original target group was the Core Villages only

IG4: JECA effectively supports communities to manage NR and IGAs

IG4 OVERALL ASSESSMENT TO TAKE FORWARD TO MULTI-STAKEHOLDER WORKSHOP:

OVERALL RANKING 2, but should be 3 based on Intermediate Goal statement

Reasons:

- To the largest extent, JECA supported the communities to manage NRs and IGAs

BUT

The rigidity of the log-framework and corresponding indicators affect this assessment because:

- JECA is not working with households
- We are facilitating not mobilising
- Many people know JECA and its role

Refer to footnote 7

Nominations for M/S Workshop are

IG1 Mkubwa Hamza
Ali Juma

IG2 Said Fakhi
Habib Abdulmajid

IG3 Simba Khamis
Hamisa Suleiman

IG4 Daudi Mchezo
Abdallah Hamad

Annex 15 Summary Multi-Stakeholder Workshop 29th & 30th April

Comments from the floor as regard to log framework presentation

IG 1: Communities around JCBCA manage natural resources effectively

Mkubwa presented the group report
Awesu from Kitogani gave 80% rank based on Kitogani experiences.
Mackonda from Kitogani agrees to the ranking
Kibuteni representative suggested 80%

IG 2 The Zanzibar DCCFF implements enabling policies and provides adequate support to communities for effective CBNRM

Ali Abdurahim presented to the group
Keis Sadiq suggested that there should be more village meetings
Kizimkazi noted that there has been no success the 0% in Kizimkazi
Sheha agreed that it is true that there is no success in other areas but there have been some efforts.
Bibi Felista suggested that we should look at DCCFF as government laying down policy and legislation.
Thabit clarified that if we include wider area the rank should come down.

IG 3: Communities around JCBCA develop and implement environmentally friendly on-farm income generating activities

Abuubakar presented
Keis Sadiq commented on the nice presentation of the IG ranking.
Nungwi: Wanted to know what are the plans to extend S&C scheme to Nungwi.
Mkoma: Just recently we have started operation in wider area. We are still continuing and we will get to Nungwi.
Woman representative: S&C scheme has helped women in the villages.
Khalid Awesu: Commended the work of S&C unit.
Another representative: commended the IG 3 and gave the group a rank of 4.

IG 4: JECA effectively supports communities to manage natural resources and IGAs

Daudi Iddi Mchezo presented
Mackonda: What is the problem and why you gave yourself 2.
Clarification: Director made clarification on the issue - indicators in log-frame.
Kikoti from Kibuteni: Let us give JECA a score of 3.
Sofia: JECA has assisted us in terms of handicraft and also agriculture as well as irrigation. It should be given the highest marks.

Impact Assessment

Group was broken into two and asked to make the impact assessment using the scoring set out below. The project was assessed for its economic, social, institutional and environmental impacts.

Rankings were given according to following scale:

- 0 no change
- + little change
- ++ big changes
- negative changes
- big negative changes

Reasons were given for the score and the participants had the opportunity to make other remarks and comments.

Group Presentations

Group 1 - note institutional impact was not assessed by this group

Impact Area	Score	Reasons	Comments
Economic	+	(1) IGA has have improved economic positions of communities	Need to focus more on poorest and give wider area more emphasis
Environmental	+	(1) Community understands conservation issues and participates in project (2) Status of rare species has improved. (3) JCBCA is to be upgraded to NP	Need greater transparency and management agreement should be implemented
Social	+	(1) Relations with the village has been good (2) Transparency has increased (3) Improved relations with other communities (4) Clear procedures and process of using natural resources	Education must be emphasised

Group 2

Impact Area	Score	Reasons	Comments
Economic	+	(1) Resources available were not enough for all (2) Many have not been reached	The quantity and type of inputs have not satisfied the demand Including the wider areas increased target leaving the core areas not satisfied.
Environmental	+	(1) Achievements differ in different villages The agreements are not all followed	We have taken into consideration the size and number of resources before the project inception and afterwards.
Social	+	(1) Changes in behaviour	Time is still too short to judge behavioural change
Institutional	++	(1) New institutions have been created and cooperation is good	Increase in the number of institutions and their confidence

Comments on the Impact Assessment

Sheha: How much of the impact in group two is ++. Sheha's opinion is that the score is too high.

Mkoma: The word "institutional" refers to what was there before and after the project. This includes the VCCs, women groups, and beekeepers

Ramadhan Ali: (Unguja Ukuu): Why are we expanding?

Said Fakh: That is too high a mark

Mkubwa Hamza: We are not looking at DCCFFF, but cut across a lot of institutions
There was an intensive discussion on this issue. However, the score, it was clarified, it is based on the number and variety of institutions. The score also touches some elements of level of confidence of those institutions and empowerment.

Annex 16: References

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