

## Darwin Plus: Overseas Territories Environment and Climate Fund Annual Report

**Important note** *To be completed with reference to the Reporting Guidance Notes for Project Leaders:  
it is expected that this report will be about 10 pages in length, excluding annexes*

**Submission Deadline: 30<sup>th</sup> April 2017**

### Darwin Plus Project Information

Project reference	DPLUS049
Project title	Maximising long-term survival prospects of Montserrat's endemic species and ecosystem-services
Territory(ies)	Montserrat
Contract holder institution	UK Overseas Territories Conservation Forum
Partner institutions	Treweek Environmental Consultants, Montana State University, Montserrat National Trust, Montserrat Department of Environment
Grant value	£83,710 in Y1 + £81,690 in Y2 = total £165,400
Start/end date of project	1 April 2016 to 31 March 2018
Reporting period (e.g., Apr 2016-Mar 2017) and number (e.g., AR 1,2)	April 2016 – March 2017 AR 1
Project leader name	Dr Mike Pienkowski
Project website/blog/Twitter	<a href="http://www.ukotcf.org">www.ukotcf.org</a>
Report author(s) and date	Dr Mike Pienkowski, Mrs Catherine Wensink (UKOTCF), Dr Jo Treweek (Treweek Environmental Consultants), Mr Nicolas Tirard (Montserrat National Trust), with contributions from Montserrat State University and Government of Montserrat, 26 April 2017

### 1. Project overview

Montserrat has at least 12 endemic (sub) species despite two-thirds of the island being an Exclusion-Zone due to volcanic activity, which destroyed large areas and the capital over 20 years ago. Earlier part-Darwin-funded work focussed on collecting baseline biological data and developing plans to protect the Centre Hills. This project takes a strategic view of the whole island – needed to identify and minimise pressures, and to ensure that the natural resources are safeguarded, and that they also potentially underpin environmentally sustainable economic recovery.

Maximising the survival prospects Montserrat's endemic species and ecosystem-services (e.g. water-supply and natural areas that provide a basis for ecotourism etc.), so vital to the economy, is dependent on maximising the area of natural ecosystems. There are three elements necessary to achieve this: (A) In the open zone, introducing effective planning and Environmental Assessment, and building local capacity on this and on conservation, as well as increasing local availability of biological data; (B) identifying threats to the remaining forests in the Exclusion-Zone (e.g. invasive/non-native species) and identifying ways of mitigating these, to contribute towards recovery; and (C) facilitating sustainable tourism, valuing the environment

and involving more local people in using it sustainably for livelihoods, without compromising its role in biodiversity conservation. This project focuses on element (A) and develops plans for (B). UKOTCF and local partners are addressing (C) in other ways outside of Darwin-Plus grant priorities.

The project has been developed to support objectives in Montserrat's Sustainable Development Plan (SDP) 2008-2020, which involved extensive community consultation. Activities outlined here encourage community engagement in conservation actions, not just during the life-time of the project but continuing beyond it, through the Montserrat National Trust. It will support the work of several Government Departments, including the Physical Planning Department to meet objectives under the Physical Development Plan and the Department of Environment to meet their objectives as set out in the Conservation and Environmental Management Act 2014.

In addition to the Centre Hills, currently the largest National Park on Montserrat, the 2km<sup>2</sup> area to the south, currently in the Exclusion Zone, known locally as Roche's could present an opportunity to restore or manage a tropical Caribbean forest. This vegetated area has mostly become isolated from other forested areas (see map) following volcanic activity. It is being impacted by invasive plant species including *Mimosa acacia*, *Casuarina* and feral animals but it is evident that endemics are still present including the oriole (Forestry Department, pers comms). An in-depth account of the south is found on page 7 of the Annex 1st Workshop report. This project seeks views from, and attempts to facilitate agreement between stakeholders on what to do with this area.

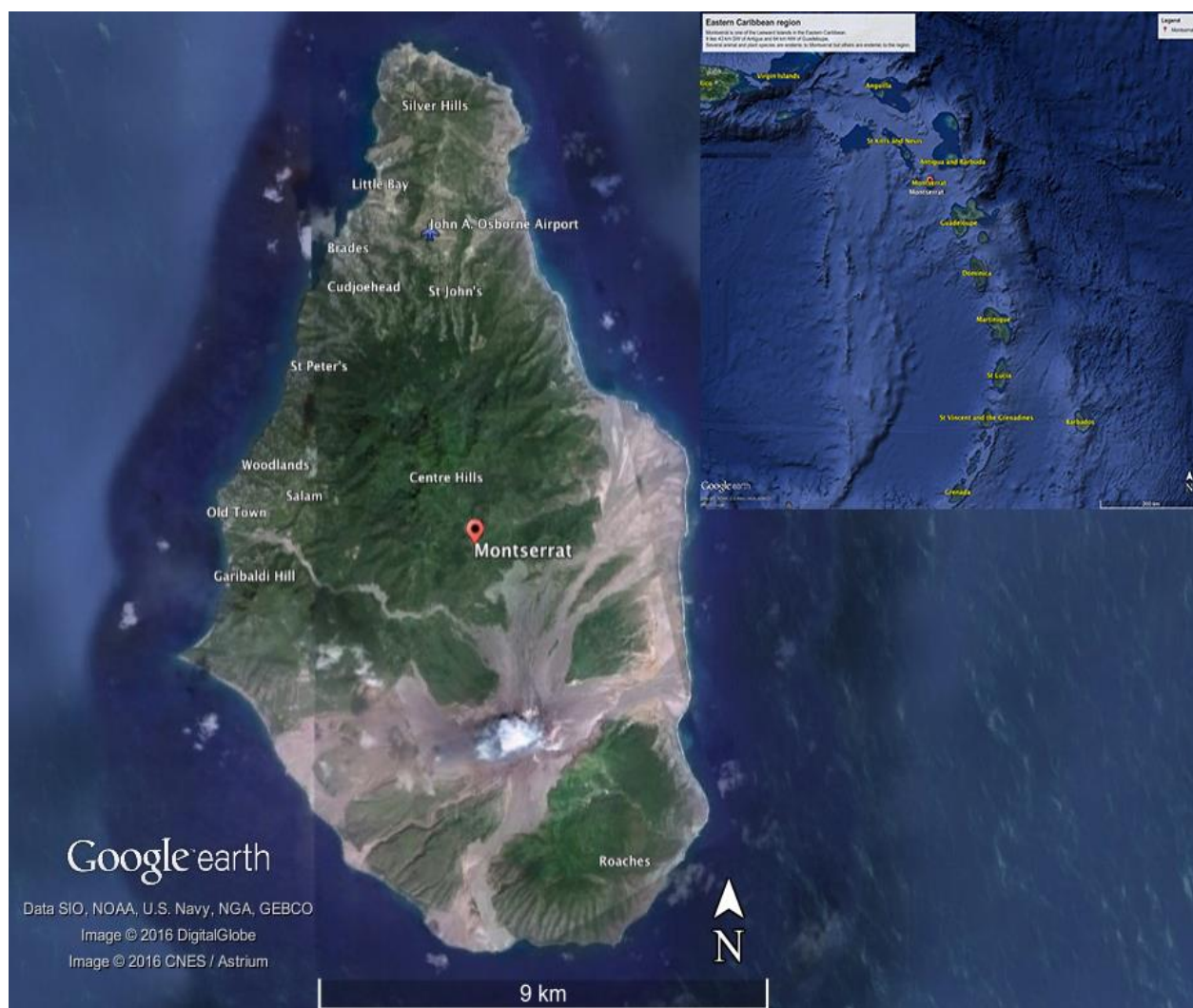
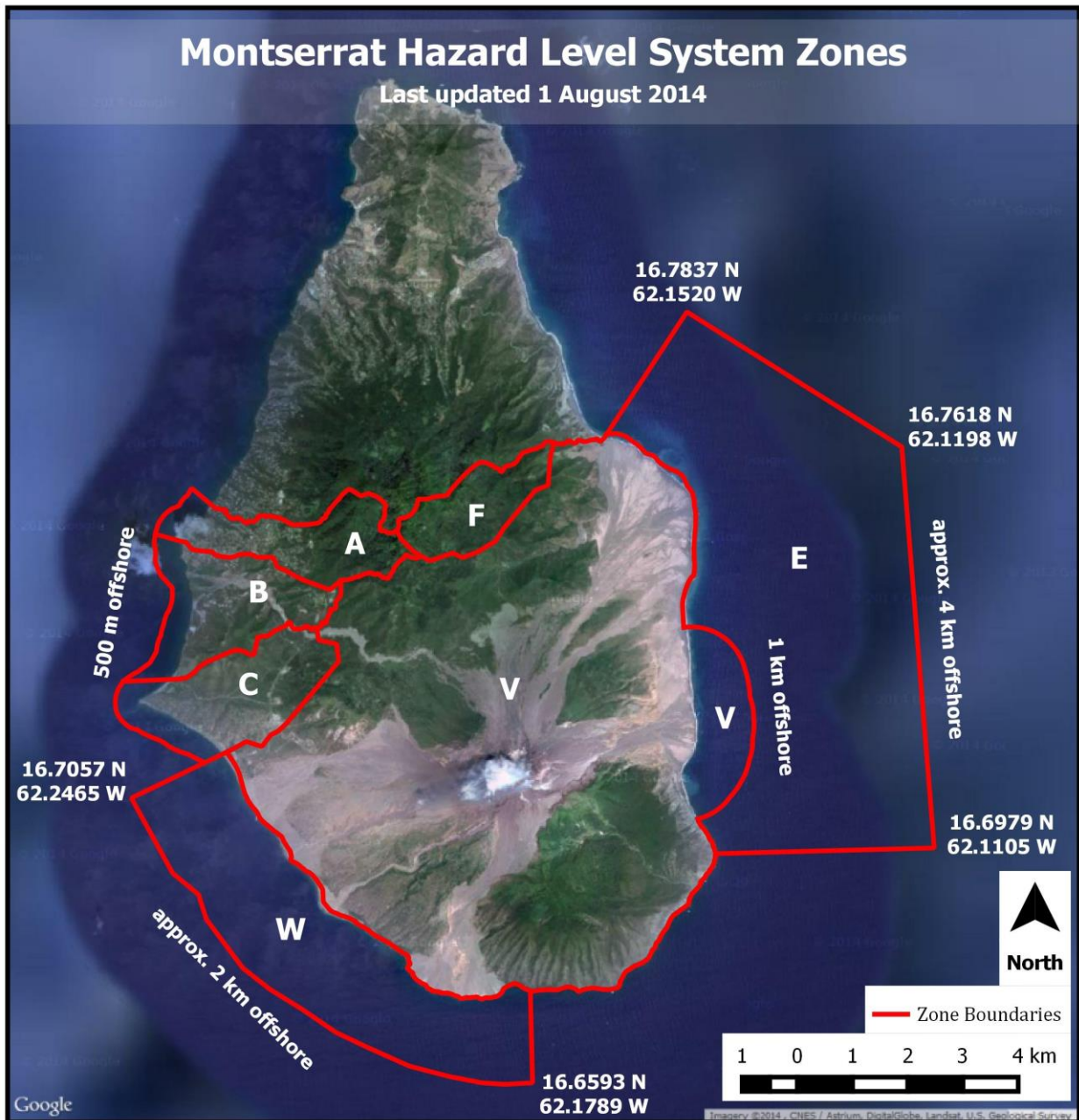


Figure 1 (above): General map of Montserrat, showing major regions. Volcano's summit is cloud-covered in central south, with Plymouth where the westward volcanic flow reached the sea. Inset: location (red dot and white lettering) of Montserrat in Eastern Caribbean region

Figure 2 (below): Hazard-level zone system. At present, zones A, B & C are either fully open or with some restrictions. Zone V is closed except by special permission for particular areas and purposes (map courtesy Montserrat Volcano Observatory; base maps in both figures courtesy of Google Earth).



## 2. Project stakeholders/partners

UKOTCF is a UK charity, which has had, for over 30 years, a close and continuing relationship with UKOTs, including Montserrat. It is the only organisation solely devoted to conservation, sustainability and related education across all UK Overseas Territories (UKOTs) and Crown Dependencies (CDs). It does not have a separate agenda, other than that determined in consultation with the territories, with which it always works in partnership. This and other projects are developed out of this relationship. The project partners were closely involved in the planning of the project. Physical meetings between UKOTCF and Montserrat project partners and other local stakeholders have been held half-yearly, supplemented by over 20 Skype meetings between various combinations of partners and the lead partner.

Cross-sectoral stakeholder involvement, not limited to environmental bodies, is fundamental to this project. Indeed, one element (Output 3) is concerned solely with achieving an agreed plan, to form the basis of future work. Such stakeholder involvement is crucial to other elements too.



The capacity of the project partner, the Montserrat National Trust, has been raised with the appointment of a well-qualified Project Officer. Furthermore, because of this appointment it has been possible for the partners to develop a successful proposal to the EU BEST Scheme. The project, which was awarded €90k enabled the PO's position to become full-time, raising the capacity further. The supplementary project will build infrastructure at the botanic garden so that the endemics *Rondeletia buxifolia* and *Epidendrum montserratense* and other endangered species can be propagated for reintroduction, dramatically improving their survival prospects. This complements the project activities well, as it provides the local community with the means to reintroduce important plants in to their local areas through the *Adopt a Home for Wildlife* initiative and will maximise their range on island. In addition, Katie Metcalf of Environment Systems, provided an introductory session to the PO and personnel from the Department of Environment, on the use of open source software, QGIS.

The capacity of all, but particularly project partners Montserrat Government Departments, was raised (and will continue to be raised) by the project element investigate the interaction of environment and development planning, together with its training and practical, low-cost recommendations for improved use of limited resources.

The project workshop and other consultation reports, with attendance lists (Annexes 4-5) illustrate the strong involvement of the relevant organisations and individuals. The enthusiastic response and initial sign-ups to the *Adopt a Home for Wildlife* part of the project (see Activity 2.4 in Annex 1, and Annex 3) illustrate strong interest and active involvement from the general and business community. To foster greater support from within the community, the initial sign-ups, Dwayne Hixon and Julian Romero, have contributed interviews, which were published in the 3rd project newsletter.

The first workshop on the future of the south was an opportunity to bring together all stakeholders. It explored why it would be good to carry out work in the south. Responses included: benefits to biodiversity and ecosystem services, importance of heritage sites in the south, opportunities for research and discovery and economic opportunities. A general consensus was achieved in the first workshop that taking no action would result in a loss of species biodiversity and missed research opportunities. This formed the basis of the following workshop which explored in further depth the opportunities and scenarios.

General public support for the project is evidenced by unsolicited positive comments to the first three issues of the project newsletter *Saving Our Special Nature of Montserrat*, and the interest and informal feedback from listeners to project interviews on Montserrat's national radio station (see Output and Activity 4.1; the Montserrat Radio (ZJB) programme editor advises that an average of about 5% of Montserrat's population listen to each of the Saturday morning shows).

### **3. Project Progress**

#### **3.1 Progress in carrying out project Activities**

##### *1. System in place to ensure that developments in the occupied zone take full account of maintaining the natural environment*

1.1 *Pro-bono* input was provided by two international experts from Treweek Environmental Consultants, both of whom are experienced in undertaking environmental audits for international funding bodies, as well as in Environmental Impact Assessments (EIA). TEC visited Montserrat with the UKOTCF team in November-December 2016, to review practical implementation of the existing EIA system with respect to mainstreaming of biodiversity. In the present visit, through stakeholder interviews with members of the Planning Development Authority (PDA) and others, basic resource constraints were found to be impeding the abilities of competent and committed local personnel in ensuring that biodiversity constraints, risks and opportunities are recognised by the EIA system and suitable mitigation strategies developed. The visiting consultants identified simple approaches, considered to be achievable with existing resources, and advice was given on implementation. These include: example terms of reference for a development project, with an annotated section on biodiversity, a draft checklist for considering biodiversity issues and impacts in EIA and CEMA schedule 1 activities. The full report on this and other activities in this output was prepared by March 2017 and circulated to local stakeholders for checking. The report has now been finalised and is appended. Briefed by

the visiting consultants, the Project Leader also conducted a follow-up meeting with Montserrat's Premier and the Minister for the Environment, to discuss implementation of the recommendations – which they wish to do. The visiting consultants remain available to give further advice remotely.

1.2 The visiting consultants spent a week conducting individual and small-group discussions with key stakeholders, and an initial feedback session was held with them and a variety of other personnel. Based on the results of Activity 1.1, plans for 1.2 were slightly modified, as described in Annex 4, to ensure that a solid EIA platform would be in place to support effective consideration of biodiversity and ecosystem services in the planning system.

1.3 This aspect was emphasised in discussions and presentations during the visit, and in the report mentioned in 1.1. Follow-up advice remains available, and monitoring of progress and facilitation of this will continue throughout the project, and potentially beyond, because of UKOTCF's long-term relationship with Montserrat.

## *2. Better local capacity to address development and conservation issues and support this by biological databases*

2.1 Currently, Montserrat does not have access to large amounts of data collected on its invertebrate fauna. Project partner Montana State University has recruited a graduate programmer to build an individual portal for Montserrat (see *Bumble Bees of Montana* <https://tinyurl.com/k24c2l2> as example of programmer's work). MSU is a fully-vested collaborator in the xBio:D (trans-Biology: Diversity) database, at Ohio State University. The database, an Oracle-application query-able in OJ-Break-API, is a data-provider to both iDigBio and GBIF, so those protocols are in place and functional, compliant with international and Darwin-Core standards. It is hosted by a consortium of US universities and funded in perpetuity by an endowment. The portal to this database is currently under construction and well advanced. It provides a localized environment for presenting data. The appearance of the page is currently being discussed with the Montserrat National Trust. This is so as to provide a more localised visual portal for Montserrat and users of the data. Further consultations with the Government of Montserrat and Department of Environment will follow. The page will have many features, including the ability to see in 'real-time' where each specimen has been taken from, and information about each record. The format of the page will be presented to, and reviewed by, MNT and DoE during MSU's visit to the island in June-July 2017, when final local testing and adjustment will be undertaken. This will enhance resources for conservation and long-term security and management of biological data for Montserrat (and potentially other UKOTs for which many specimens exist already).

2.2 Two students (including one from the Caribbean) have been recruited by Montana State University to translate data from physical records and specimens to the database also incorporating images (see example: <http://hol.osu.edu/index.html?id=318647>). This information will be viewable via the Montserrat portal once in place. Following a relatively short first period of activity within the reported year, once the basic programming was in place, 694 individual invertebrate records had already been entered. These date mainly from the current century, but include also some earlier records, the earliest being 1910. So far, records have been brought together from 8 institutions, most in the US, but including also some in UK and Canada.

2.3 Local training is planned for the second year of the project. Logistic plans have been made for this; travel has been arranged, and other plans are being implemented. Permits for any further collections of biological records have been drafted and will be submitted to the DoE.

2.4 Work on ways of addressing invasive species, and other aspects of restoration, has been a major activity, particularly in the second half of the first year of the project. Consultations between UKOTCF and Montserrat National Trust partners, together with support from Montserrat Government partners, have led to a major development of ideas, so that an "Adopt a Home for Wildlife" sub-project will continue indefinitely beyond the reported project. Local land-owners, business people, community groups, schools, etc. are encouraged to volunteer to assist in some way (e.g. provide access approval, voluntary effort, funding, assistance in kind), in the adoption of a particular area. They then manage it under a plan agreed with the Project Officer, under the auspices of project partner Montserrat National Trust. This embraces aspects like site-cleaning, removal of invasives, planting of native species (especially those threatened), installation of interpretative materials, etc. Already, 2 sites are in progress and

offers/negotiations are in progress for 5 others. Approximately 10 persons (or institutions each with potentially many participants) are already active or have expressed an interest. The project has helped secure additional resources, not just from local businesses and persons, but also through the BEST EU grant mentioned above (see <https://tinyurl.com/lkh52I9>).

2.5 This has been achieved by the successful recruitment of a local Project Officer, who is well qualified, experienced and effective. Although not immediately available at the start of the project, the quality of work has rapidly made up for this, achieved despite problems in Montserrat's infrastructure, particularly impacting power supply.

### *3. Plan for the restoration and management of Montserrat's Exclusion Zone*

3.1 Cross-sectoral consultation system established, with Ministerial support, and the first 2 workshops on the future of the south held, with reports produced.

3.2 Assessing resource needs for action falls into the second year of the project, currently being planned in detail.

3.3 Volunteer input secured, to contribute to facilitation and reporting of workshops, ecological and restoration aspects, and GIS analysis, as well as the donation of 12 high-resolution satellite images of Montserrat obtained through a grant from the Digital Globe Foundation, owners of the WorldView satellites. If purchased for commercial use they would cost over US\$55,000. It was made possible for this conservation project through collaboration with our US University partner.

3.4 Planning for future action falls into the second year of the project, currently being organised in detail.

### *4. Project managed and delivered*

4.1 Two leading articles in UKOTCF newsletter *Forum News*, as well as mentions in 2 other articles (in addition to general articles on *Darwin Plus* in most issues). *Forum News* is circulated widely in UK, UKOTs, CDs and elsewhere, with a basic circulation of over 500 copies, most of which have multiple readers and many of which are copied on. Many independent web-sites, list servers (e.g. EU Overseas Google group; several Caribbean regional ones) and social media routinely note these, vastly increasing the effective circulation. As an indication of reach on social media, Facebook postings range from 59 to 585 in 10 posts relating to the project activities. Tweets relating to the project have tagged @Darwin\_Defra.

There was also a special announcement prominently flagged on the UKOTCF home-page ([www.ukotcf.org](http://www.ukotcf.org)), with links on its social media sites, at the start of the project. The *Wider Caribbean Working Group eBulletin* (circulated to over 90 key active persons in the Caribbean and elsewhere) has carried 3 articles on the project in its first year. The first 3 issues of the project newsletter *Saving Our Special Nature of Montserrat*, circulated widely in Montserrat and elsewhere, have been well received, resulting in many unsolicited favourable responses. All copies of the project newsletter carry the logos of the Darwin Initiative and of project partners. This applies also to all main articles on the project in *Forum News*, all project workshops, illustrated talks on the project (whether in Montserrat, UK or elsewhere), and any other opportunities.

Most people in Montserrat and many others, including the large diaspora population, get their news from Radio ZJB (both broadcast and online). One of the most popular programmes is Rose Willock's Saturday morning discussion. During both project visits, the project team (Montserrat and visitors) had prolonged interviews in the programme, and it has been arranged to repeat this during the third visit. In addition, there were several further interviews and other reports in the news bulletins, parts of which are syndicated across the OECD region. In addition, UKOTCF has helped MNT with related dissemination and education, including the MNT newsletter (Facebook reach 331). This falls outside, but is closely related to, the project – for example, help on a book for children on the special wildlife of the island, complementing UKOTCF/MNT earlier publications for adults, and wildlife videos.

The UKOTCF-network throughout UKOTs, CDs, UK and elsewhere is already being sensitised to the potentially wider benefits arising from this project, and this will be utilised even more in the second year and afterwards.

4.2 Management achieved, despite some long-term national infrastructure problems causing repeated power failures in Montserrat. Physical project meetings were held during half-yearly UKOTCF visits, and numerous remote meetings held by Skype, supported by email and other electronic means.

In addition to the planned substantial donation of resources by the project partners, the project has arranged for major additional outside contributions (see Activities 2.1, 2.4, 3.3 above).

As requested by Defra, the programme has been adjusted to cope with the fact that the value of the grant has so far been reduced by about 15%, due to the effective devaluation of the £ following the 'Brexit' vote. This has been achieved by relatively small adjustments to the work programme, extra donated work by UKOTCF and consequent movement of funds between sub-headings (so far within standard virement limits).

Overall, project progress approximates to the planned schedule, subject to adjustment of balance of content in Output 1, better to match improved analysis of priority needs identified as part of the project progress (see 1.2 above). In addition, there was a delay in the Project Officer being available to start work at the planned rate. However, some extra work by UKOTCF and the Project Officer's work since have overcome this. Chronic power failures affecting the whole of Montserrat since November 2016 and continuing beyond the reported year have presented a further challenge (see Section 7), but attempts are being made to overcome this.

### 3.2 Progress towards project Outputs

Output 1:	System in place to ensure that developments in the occupied zone take full account of maintaining the natural environment		
	Baseline	Change recorded to date	Source of evidence
1.1 Procedures and criteria set out.	1.1 Procedures not fully set out and interaction between requirements of Planning Ordinances and new Conservation Ordinance not fully analysed.	1.1 Interactions between local personnel and visiting <i>pro bono</i> consultants have set out these procedures and identified practicable means of achieving these within existing resource constraints.	1.1 Report of project consultants agreed with stakeholders (Annex 4).
1.2 Environmental assessments available for development proposals.	1.2 Environmental assessments apparently available for only some proposals.	1.2 Environmental assessments are available for some proposals. The coverage is anticipated to be improved as a result of the project work, and this will be reported later in the project.	1.2 EIA documents for proposed developments (mainly in second year)
1.3 Decisions demonstrate environmental sustainability being taken into account.	1.3 Some recent decisions have taken environmental sustainability into account, but clarity and accountability needed more generally.	1.3 Some decisions taken over the last 2 years since initial pre-project advice from UKOTCF and <i>pro bono</i> consultants, as requested by the then new Government, already show environmental sustainability to some extent. Progress will be reported more fully later in the project.	1.3 Reports of planning authority decisions (mainly in second year)
Output 2:	Better local capacity to address development and conservation issues and support this by biological databases		
	Baseline	Change recorded by 2017	Source of evidence

2.1 Modified locally accessible database available and training in its use developed.	2.1 No access from Montserrat to results of earlier entomological (and some other) work there.	2.1 System well advanced (and a link will be provided in a later report when generally available). Organisation of training also well advanced, and training will be reported later in the project	2.1 See Activity 2.1 in Annex 1, and Annex 3 for profile. A link to the Montserrat –specific web portal will be provided in a future report; completion in second year.
2.2 Data entry for Montserrat invertebrate information held remotely and repatriation achieved.	2.2 As 2.1.	2.2 Two students (one from the Caribbean) recruited to collate physical records and specimens and transfer to the database. Progress listed in section 3.1 sub heading 2.2	2.2 See Annex 3 for personnel profiles and Annex 1 for Activity 2.2. Public database supports this, but access difficult before Montserrat portal available (links to similar portal provided in earlier section of report )
2.3 Local personnel trained in recording and data recording systems, and operating these.	2.3 No data recording/ retrieval system available, despite the existence of remotely held information.	2.3 This is planned for the second year of the project.	2.3 In second year of project.
2.4 Information on current status of invasive plants in the open zone collated, and management and control plan developed and initiated.	2.4 Only sporadic data available; management and control plans lacking.	2.4 To be collated and reported, together with ongoing plans in the <i>Adopt a Home for Wildlife</i> initiative implementing this output, later in the project.	2.4 This information will be integrated in the reports and plans for the <i>Adopt a Home for Wildlife</i> initiative, which is the effective way developed in the first year for meeting these aspects of the Output. Available in the second year as individual “adoptions” are only just starting, on schedule.
2.5 Local post filled and operational.	2.5 No local capacity to address these areas, because of lack of staffing.	2.5 Local post filled and effective. 1 P/T Project officer (made F/T through additional funds EU BEST secured with the help of this project) 2 volunteers for GIS training and work of approx. 4 days	2.5 Contract; see also project newsletters and reports (Annexes 3-5). EU BEST grant awarded €90k; Digital Foundation Grant awarded \$55k
Output 3:	Plan for the restoration and management of Montserrat’s Exclusion Zone		
	Baseline	Change recorded by 2017	Source of evidence
3.1 Full local consultation system to input into an agreed plan for use of the Exclusion Zone, emphasising restoration of natural ecosystems developed.	3.1 No agreed plan, or system to develop one, for the Exclusion Zone, something which had negatively impacted some previous conservation efforts by others.	3.1 Full local consultation system established and first 2 workshops held, with wide cross-sectoral participation (1st & 2nd workshop: each with 20 participants/ attendees and 9 apologies for absence), and 3 reports produced.	3.1 Project reports and newsletters at Annexes 3 & 5.
3.2 Information on the resources required	3.2 Little of this information available, and not collated.	3.2 This falls into the second year of the project, currently being planned in detail.	3.2 To be addressed in second year of project.



3.3 Volunteer expert input to the project achieved.	3.3 Potential experienced volunteer support not identified or contacted.	3.3 Volunteer input (2 persons) achieved to contribute to facilitation and reporting of workshops; 2 volunteers for investigation and development of practical advice on physical planning systems; 2 volunteers training and analysing on GIS; local volunteering developing; major volunteer input from main partners; as well as the donation of over US\$55,000 worth of satellite imagery from a normally commercial source.	3.3 Project reports and newsletters at Annexes 3 & 5.
3.4 Integrated plan for the environmental restoration and management of the Exclusion Zone produced	3.4 No such plan in existence.	3.4 This falls into the second year of the project, currently being planned in detail.	3.4 Eventually, the plan itself and project reports (in second year of project).
Output 4:	Project managed and delivered		
	Baseline	Change recorded by 2017	Source of evidence
4.1 Reports and articles on lessons learnt on UKOTCF and other websites and social media, <i>Forum News</i> articles, presentations at meetings and conferences.	4.1 No dissemination because no project.	4.1 Dissemination of the project outlined on page 6	4.1 The material listed can all be accessed on <a href="http://www.ukotcf.org">www.ukotcf.org</a> except radio broadcasts (some links to these, in project newsletters and other <a href="http://www.ukotcf.org">www.ukotcf.org</a> articles, may still work- although outside UKOTCF's control).  Facebook for 10 posts (see section 3.1) ranged from 60-600
4.2 Management of all aspects of the project, including local and remote meetings.	4.2 No management because n project.	4.2 Two half-yearly physical project team meetings held, and over 20 Skype meetings of various project team groupings. Half-year and (this) 1-year project reports produced.	4.2. Interim and final reports on the project.

### 3.3 Progress towards the project Outcome

For Indicators, direct measurable biological results are extremely difficult to test within the 2-year limit of current Darwin Plus projects. However, good indirect indicators are available and outlined below

Outcome:	Island-wide ecological sustainability and endemic species-survival enhanced, despite interaction of volcanism and human-activities, through strategic planning and varied management approaches, and biological recording, in both open and Exclusion Zones.		
Indicators	Baseline	Change recorded to date	Source of evidence
0.1 Results of development proposals show that environmental sustainability is being taken into account.	0.1 Whilst there was a clear wish in Montserrat Government and its officers, in the present situation,	0.1 The acceptance of outline project proposals by Premier and Environment Minister are encouraging (as has been their support throughout); continued monitoring will assess practical	0.1 Project newsletters and reports (see Annexes 3-5) re support for project, and support in its implementation.

	for environmental sustainability to be taken into account, there appeared to be problems in doing this, requiring analysis and the development of solutions.	impact.	
0.2 Human and supporting infrastructure improved.	0.2 Conservation capacity in Montserrat Government and MNT severely overloaded, effectively preventing initiatives to break out of this situation.	0.2 The appointment of 1 well qualified, able and committed Project Officer has immediately improved capacity significantly, and resulted in securing of other resources to enable FT working. The enthusiastic local take-up of <i>Adopt a Home for Wildlife</i> , gives much potential for long-term local voluntary support. 10 members of local involved in programme in first year.	0.2 See Activity 2.4 in Annex 1 and project newsletters and reports (Annexes 3-5). <i>Adopt a Home for Wildlife</i> formalised and documents produced
0.3 Plan in place for resourcing and implementing an environmentally sustainable management plan for the Exclusion Zone, re-establishing natural forest.	0.3 No plan in place or developed.	0.3 The agreement achieved in the first workshop (and reinforced in the second) that stakeholders from all sectors wish to agree a plan, gives a strong base for this element of the work.  All these elements include innovative aspects, which the well-established UKOTCF network is already disseminating across UKOTs/CDs.	0.3 Workshop reports and project newsletters (Annexes 3 & 5).

### 3.4 Project support to environmental and/or climate outcomes in the UKOTs

Increased capacity achieved, in the person of the Project Officer recruited on Montserrat and supported by the growing local volunteer assistance, allowing a break-out from the bottleneck preventing new initiatives (see Activity 2.4 in Annex 1, and Annex 3).

Even in the first months of this aspect of the project, *Adopt a Home for Wildlife* has identified and developed a major potential local capacity for practical conservation support in the local community, which is likely to be maintained long-term (see project newsletters, Annex 3; there will be fuller reports in the second year of the project).

Ministers have indicated a wish to implement the recommendations arising out of the work of the project specialist consultants and Montserrat personnel (to some extent reported in project newsletters and reports – Annexes 3-5 – and supplemented by a meeting between Premier, Environment Minister and Project Leader) in terms of environment considerations within planning and development. .

In the challenging matter of the future of the south of Montserrat, stakeholders from all sectors confirmed in the project workshops, their shared wish to agree a common plan (Annex 5).

New initiatives being developed, for potentially wider application in other UKOTs and elsewhere including advances in access to biological collections, specifically invertebrate fauna (see Section 3.3).

Use of satellite imagery and some free software such as QGIS which will be developed further in year 2 is an important resource for those with resource constraints particularly for ongoing monitoring of remote areas and which is unpopular to fund in the long term.

### **3.5 Monitoring of assumptions**

The assumptions listed initially are repeated below, with (in parentheses) any updating comments:

That severe hurricanes do not disrupt: Apart from very severe hurricanes (most recently in early 1990s), disruption tends to be short-term.

That human-induced blockages do not disrupt: As finding ways to address these is a fundamental part of the project, major impacts are not envisaged.

Sufficient computing capability on Montserrat. Both the Montserrat Government Department of the Environment and the Montserrat National Trust have adequate facilities and trained personnel. (This is modified in that the chronic electrical supply failures – see Section 7 – are both impeding work and damaging equipment. Attempts are being made to work around this, but effective working time is inevitably lost.)

Qualified person recruited to local post. Although Montserrat has a small population, the skills and qualifications levels are high, so this should not be an issue.

That further volcanic activity does not cause disruption: The volcano has moved into a period of low activity in recent years, such that some restrictions in sectors of the Exclusion-Zone are being reduced.

Local stakeholder participation is key, via a wide range of activities (workshops, consultations, etc.). The Government Department of Environment, the Montserrat National Trust, and other partners have an excellent record of participation in effective workshops and consultations. (Both the Department of Environment and Montserrat National Trust have had extra demands on time, due to illnesses, overload and limited resources, as well as unexpected tasks. The project is attempting to work around this by intensive periods of activity following disruptions.)

The project will be successfully delivered. All partners in the project have an excellent record of delivering project objectives, and managing required resources effectively and efficiently.

## **4. Monitoring and evaluation**

The model, as set out in the project proposal, has been followed. In practice, the scheduled meetings involving all partners have proved impracticable for various reasons. These arise in part from the heavy overload and illnesses in Montserrat partners (see Section 3.5), and from the very heavy work-loads and international travel schedules of the senior volunteers in the other partner organisations donating their time to the project (as well as other partners recruited to bring in other expertise). UKOTCF's experience has readily overcome this by the use of separate physical or Skype/phone meetings focussing on particular aspects of the work – which have the additional benefit of making better use of time. The evaluation against plan was done through the completion of, or progress in (as appropriate), the main activities and outputs (see section 2 above).

Information is shared by a variety of means (e.g. Dropbox, emails, Skype/phone conversations, physical meetings) as appropriate, with regard to the nature of the information and cost-effectiveness. Late in the first year, an online project tool (Trello [www.trello.com](http://www.trello.com)), has been experimented with to monitor and evaluate the project given that partners often work remotely. In year 2, this will be utilised and further reports will review the usefulness of this tool.

## **5. Lessons learnt**

The project has more qualitative than quantitative outputs. Some M&E in the form of the physical reports and policies that will be produced can be quantified. However, the importance of the qualitative aspect that is more difficult to directly evaluate, but is important – the local buy-in, agreement on the need for a more accountable EIA approach and a more collaborative and consultative approach for planning the future of the south. This is not a finite project, but one that is going to get the ball-rolling for a more accountable EIA process and effective data-

management. Ultimately, the responsibility will lie with the on-the-ground organisations, and this project is providing the necessary means to get this going.

The following aspects worked particularly well in the past year:

- Wide cross-sectoral stakeholder participation
- Ministerial support
- Effective local Project Officer
- Active public support
- Using project to leverage further support
- Major contributions of time by main partners
- Commitment of partners

The following aspects worked less well:

- The devaluing of the grant by about 15% (addressed by extra unpaid work and rebalancing funding)
- Disruptions to communications and work-schedules by chronic power failures and surges
- Overloaded work-schedule of Montserrat-based partners due to resource limitations (human and financial), delays in some information-sharing, and unpredictable events (such as 'Brexit' and devaluation of the pound) affecting all partners

Similar projects would benefit from the following recommendations:

- Hiring a qualified person for a part-time mission can be difficult as the population in Montserrat is limited and cost of living high, so the position needs to be advertised as soon as possible (as it was in this case)
- Have an organisation and activities flexible enough to not be impacted too much by infrastructure constraints (such as power outages, ferry cancellations).

This learning will be built into the project and future plans in the following way:

- The training offered to local students as part of the second year of the project will allow the Trust and others to identify suitable future environment officers.

UKOTCF has an established relationship with the on-island organisations, particularly the MNT and DoE, and so had a realistic understanding of the local there and what could be achieved.

## **6. Actions taken in response to previous reviews (if applicable)**

Not applicable

## **7. Other comments on progress not covered elsewhere**

The way in which the project was designed allows for some degree of enhancement in the approaches, as the early, exploratory stages clarify the issues and priorities. One area which has seen refinement is the closer matching of the expertise of our planning/environment consultants to the priority needs identified with local practitioners; this is noted elsewhere in this report. The second main area has consisted of exploration of the options for delivering the increase in local voluntary conservation capacity, addressing elements such as invasive species, restoration of native species, etc. The additional local volunteers identified allowed these aspects to be integrated into the *Adopt a Home for Wildlife* initiative, with even greater potential.

The devaluation of the pound gave considerable challenges to the project, because nearly all costs are linked to the US\$. By UKOTCF personnel donating extra resources, carrying out rebalancing between sub-heads, arranging more contributions in kind from other sources, and planning for small reductions in some activities, this has been addressed – provided, of course, that the pound does not fall further.

The original risks, particularly the two natural ones of volcanic action and hurricanes the latter, of course, exacerbated by human actions, remain as in the proposal.

Whilst other resource challenges have apparently been met, the power supply failures in Montserrat remain worrying and have certainly had an impact that is out of our control. The



electrical generation system in Montserrat has been undergoing renovation as part of a DFID/Government of Montserrat project, but the work is well behind schedule. We will try to work around it by extensive periods of work on the project when the power supply is steady.

## **8. Sustainability and legacy**

Particularly within Montserrat, the project is using a project newsletter *Saving Our Special Nature of Montserrat*, radio interviews (see Section 9 below), and the efforts of local project partners, reports and word of mouth, to raise the profile of this project. As mentioned already there has been positive feedback from these, indicating high efficacy. More formally, there has been strong attendance at individual targeted interviews, workshops and other meetings (see Annexes 3-5). In addition, there was a strong commitment, at the first workshop on the future of the south, to reach a common plan during the workshop series. There has been strong support throughout of Ministers (and Governor), and the indication by Ministers that they wish to implement the recommendations arising from the work on planning and environment interactions (see Activity 1.1 and other items in Annex 1).

The outstandingly enthusiastic response to participate in the *Adopt a Home for Wildlife* initiative shows both increased activity and capacity, and bodes well for continuity after the project, via project partners Montserrat National Trust.

The project proposal itself makes clear that there will be a need for continued activity and resourcing after the project (and UKOTCF's relationship with UKOT partners is long-term, rather than limited to the duration of a project). For example, the objective of Output 3 is an agreed plan for the south of the island as a basis for resourcing bids, rather than for immediate implementation. The latter would be quite impracticable within a 2-year project – as others have found to their cost when starting without a plan agreed by local consensus.

Output 1 is designed to help Montserrat increase the efficacy of making physical developments environmentally sustainable. As noted in Annex 1, the balance of effort in this has been adjusted, in the light of clearer needs priorities emerging during the consultation process – which is why the process was designed that way. Clear recommendations have been made, taking account of the limited resources available to Montserrat. UKOTCF and Treweek Environmental Consultants remain available to facilitate implementation as needed.

Similarly, the database aspects of Output 2 are designed to put Montserrat in a better position regarding the availability and utilisation of existing biodiversity information, with additional objectives of improving this information base, and stimulating local interest in invertebrates. Regarding the latter, there is the chance of widening the nature tourism product and consequent employment opportunities.

The *Adopt a Home for Wildlife* aspects of Output 2, of which there is local ownership and into which local active conservation volunteering has been coordinated, are already proceeding well. This is potentially a major legacy, leading to a cadre of local trained volunteer capacity to take forward conservation in support of Montserrat National Trust and the Government of Montserrat – as well as to enhance local understanding and support for the value of wildlife and ecosystems in their own right and for their contributions to the local economy.

Outputs 1 and 2 (and possibly aspects of 3) are of great potential benefit to other UKOTs (and elsewhere). As well as the direct benefits to Montserrat, trialling these project elements would be of wider applicability. As part of Output 4, increasingly in the second year and beyond, we will be using the 30-year established UKOTCF network, and other means, to inform others and potentially partner with them. For the aspects of the project which plan to lead to other work, the project partners will be developing proposals in respect of these.

## **9. Darwin identity**

All dissemination of the project activities/results, as noted in section 3 above, has acknowledged the support of the Darwin Initiative. As mentioned, the @Darwin\_Defra tag has been used on social media.

This is in addition to the general publicity, and advice to potential applicants, that UKOTCF has provided *gratis* to the Darwin Initiative since the latter started, and which continues in its

publications, web-site, meetings, advice to its network and in its conferences for conservation practitioners (held every three years, subject to funding), where the Darwin Initiative features heavily as the only UK Government dedicated fund for conservation work in the UKOTs.

All copies of the project newsletter carry the logos of the Darwin Initiative and of project partners. This applies also to all main articles on the project in *Forum News*, all project workshops, illustrated talks on the project (whether in Montserrat, UK or elsewhere), and any other opportunities.

## 10. Project Expenditure

**Table 1: Project expenditure during the reporting period (1 April 2016 – 31 March 2017)**

<b>Project spend (indicative) in this financial year</b>	<b>2016/17 D+ Grant (£)</b>	<b>2016/17 Total actual D+ Costs (£)</b>	<b>Variance %</b>	<b>Comments (please explain significant variances)</b>
Staff costs			9.8	Within 10%
Consultancy costs	0.00	0.00	-	Within 10%
Overhead Costs			10.0	Within 10%
Travel and subsistence			-9.5	Within 10%
Operating Costs			6.5	Within 10%
Capital items	0.00	0.00	-	Within 10%
Others (as per proposal)			9.7	Within 10%
<b>TOTAL</b>				

## Annex 1: Report of progress and achievements against Logical Framework for Financial Year 2016-2017 – if appropriate

Project summary	Measurable Indicators	Progress and Achievements April 2016 - March 2017	Actions required/planned for next period
<p><b>Impact</b></p> <p>Ensured minimal negative impact on natural environment despite pressures of population concentration, and a start on facilitating natural restoration of natural forests and other habitats of the Exclusion Zone.</p>		<p>Even in the first months of this aspect of the project, <i>Adopt a Home for Wildlife</i> is identifying and developing a major potential local capacity for practical conservation support in the local community, which is likely to be maintained long-term.</p> <p>Ministers have indicated a wish to implement the recommendations arising out of the work of the project specialist consultants and Montserrat personnel.</p> <p>In the challenging matter of the future of the south of Montserrat, stakeholders from all sectors confirmed in the project workshops their shared wish to agree a common plan.</p>	
<p><b>Outcome</b> Island-wide ecological sustainability and endemic species-survival enhanced, despite interaction of volcanism and human-activities, through strategic planning and varied management approaches, and biological recording, in both open and Exclusion zones.</p>	<p>(Direct measurable biological results are impossible within the 2-year limit of current Darwin Plus projects. However, good indirect indicators are available: )</p> <p>0.1 Results of development proposals show that environmental sustainability is being taken into account.</p> <p>0.2 Human and supporting infrastructure improved</p> <p>0.3 Plan in place for resourcing and implementing an environmentally sustainable management plan for the Exclusion Zone, re-establishing natural forest</p>	<p>0.1 The acceptance of outline project proposals by Premier and Environment Minister are encouraging (as has their support throughout); continued monitoring will assess practical impact.</p> <p>0.2 The appointment of a well qualified, able and committed project officer has immediately improved capacity significantly, and resulted in securing of other resources (see Activity 2.4 below). The enthusiastic local take-up of <i>Adopt a Home for Wildlife</i> gives much potential for long-term local voluntary support.</p> <p>0.3 The agreement achieved in the first workshop (and reinforced in the</p>	<p>The second year of the project will see (re Output 2) the main activity in Montserrat of the MSU team, in June-July, to refine the Montserrat database portal and train various local users in the system. In addition to this main purpose, the visit will be used for further collections targeted to fill information gaps. Pre-2005, 94 species of beetles were described for Montserrat. Although 22 of these were not found, the team's final count was 718 species. The team estimates that 90% of beetle species were found. Those areas not sampled include coastal habitats and those associated with agriculture. Several species known</p>

		<p>second) that stake-holders from all sectors wish to agree a plan gives a strong base for this element of the work.</p> <p>All these elements include innovative aspects, which the well-established UKOTCF network is already disseminating across UKOTs/CDs.</p>	<p>to be endemic or locally endemic were not identified during 2005 surveys and so effort will be made to identify these missing 22. Four of these were species of conservation interest including: a weevil, and a specialist grazer on fungi on dead leaves, which may have been adversely impacted by volcanic ash, but may still be present.</p> <p>The second year will see also major progress in the other part of Output 2, the development of guided voluntary local conservation activity <i>Adopt a Home for Wildlife</i>. This will develop both the 2 started exercises and utilise the enthusiastic local response to establish several more, all likely to result in increased local capacity continuing beyond the project.</p> <p>Re Output 3, the project will make use of the satellite images and ground-truthing visits to the south, to enhance the GIS information and undertake 2 further wide-participation stakeholder workshops, to move towards a shared plan for the future of the south of the island.</p> <p>The main local activities in Output 1 were achieved in the first year, but the voluntary consultants and the UKOTCF team will continue to facilitate Montserrat partners to implement the recommendations resulting from this (see Annex 4).</p> <p>Re Output 4, as well as the ongoing management and reporting, the wider dissemination (already started) of lessons learnt, approaches trialled, and</p>
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			possibilities to adopt an area will be developed further, making use particularly of UKOTCF's well established network across all UKOTs/CDs.
<b>Output 1.</b> System in place to ensure that developments in the occupied zone take full account of maintaining the natural environment	<p>1.1 Procedures and criteria set out.</p> <p>1.2 Environmental assessments available for development proposals.</p> <p>1.3 Decisions demonstrate environmental sustainability being taken into account.</p>	<p>1.1 Interactions between local personnel and visiting <i>pro bono</i> consultants have set out these procedures and identified practicable means of achieving these within existing resource constraints (evidence provided in main progress of this report section and Annex 4).</p> <p>1.2 Environmental assessments are available for some proposals. The coverage is anticipated to be improved as a result of the project work, and this will be reported later in the project.</p> <p>1.3 Some decisions taken over the last 2 years since initial (pre-project advice from UKOTCF and <i>pro bono</i> consultants, as requested by the then new Government, already show environmental sustainability to some extent. Progress will be reported more fully later in the project.</p>	
Activity 1.1 Developing and reviewing EIA screening criteria and programmatic reviews (sand mining, urban re-development, coastal development, tourism).		<p><i>Pro-bono</i> international experts from Treweek Environmental Consultants (both of whom work particularly in environmental audit for international funding bodies, as well as in EIAs visited Montserrat with UKOTCF team in November-December 2016. Existing EIA system thoroughly reviewed. Basic resource constraints were found to be impeding the abilities of competent and committed local personnel from achieving the level that all desired. Simple approaches, achievable with existing resources, were identified by the visiting consultants, and advice given as to how to implement. A report on this and other activities in this section was prepared by March 2017 and circulated to local stakeholders for checking. The report has now been finalised and is appended. In addition, the project leader, briefed by the visiting consultants, reported the aspects inappropriate for the report to the Premier and the Minister for the Environment, who welcomed the information and considered how best to implement the recommendations – which the wish to do. The visiting consultants remain available to give further advice remotely.</p>	
Activity 1.2 Developing criteria and indicators for monitoring ecosystem services based on supply, use and benefit, via Focus Group Discussions with representative beneficiaries (reflecting variation in age, gender, livelihood).and monitoring of ecosystem services and increasing local capacity for these, land-		<p>A week of individual and small group discussions were held by the visiting consultants with almost all the key stakeholders, and an initial feedback session was held for these and a variety of other personnel. Because the results of Activity 1.1 showed a need more work there than had been apparent and that, functionally, this needs to be in place for the subject of 1.2 to be effective fully,</p>	

use planning, and biodiversity-inclusive risk-assessment.	some rebalancing of emphasis was undertaken, but (as noted above) the consultants are prepared to develop this further remotely.
Activity 1.3 Building on basic training delivered earlier to deliver training on the above and achieving strategic spatial planning for biodiversity, to include development of outcome-based indicators for threatened ecosystems and threatened and endemic species populations.	This aspect was emphasised in discussions and presentations during the visit, and in the report. Follow-up advice remains available, and some monitoring of progress and facilitation of this will continue through the project, and potentially beyond because of UKOTCF's long-term relationship with Montserrat.
<b>Output 2.</b> Better local capacity to address development and conservation issues and support this by biological databases	<p>2.1 Modified locally accessible database available and training in its use developed.</p> <p>2.2 Data entry for Montserrat invertebrate information held remotely and repatriation achieved.</p> <p>2.3 Local personnel trained in recording and data recording systems, and operating these.</p> <p>2.4 Information on current status of invasive plants in the open zone collated, and management and control plan developed and initiated.</p> <p>2.5 Local post filled and operational.</p>
Activity 2.1 Modifying existing, tested biodiversity database-system for local use, but compatible with supporting wider systems.	<p>Project partner Montana State University has recruited a graduate and programmer experienced in, and familiar with, this sort of work, to build an individual portal for Montserrat. This is currently under construction and well advanced. It provides a localized environment for presenting data. The appearance of the page is currently being discussed with the Montserrat National Trust. Further consultations with the Government of Montserrat, Department of Environment will follow. The page will have many features including the ability to see in real time where each specimen has been taken from and information about each record. The format of the page will be presented and reviewed by MNT and DoE during the visit to the island by MSU in June-July 2017, when final local testing and adjustment will be undertaken.</p> <p>The project has also enhanced resources for conservation and arranged long-term security and management of biological data for Montserrat (and potentially other UKOTs). This is by making available a database system (compliant with Darwin-Core standards) and platform hosted by a consortium of US universities</p>

		and funded in perpetuity by an endowment.
Activity 2.2. Populating this database with initial content by repatriating of invertebrate data (survey and information basic to oriole and other bird conservation) from US and UK to Montserrat.		2 students (including one from the Caribbean) recruited by Montana State University to translate these data from physical records and specimens to the database, also incorporating images. In the relatively short first period of activity within the reported year, once the basic programming was in place, 694 individual invertebrate records had already been entered. These date mainly from the current century, but include also some from early, the earliest being 1910. The records so far bring together those from 8 institutions, most in the US, but including also some in UK and Canada.
Activity 2.3 Training of local personnel, and support in the establishment of local recording and data recording systems.		This is planned for the second year of the project, but logistic plans have been made for this, travel arranged and other plans are being implemented.
Activity 2.4 Increasing local capability for conservation initiatives initially by developing an approach to removal of invasive plants and establishing a locally run system to promote and continue this.		This has been a major activity particularly in the second half year of the project. Consultations between UKOTCF and Montserrat National Trust partners, together with support from Montserrat Government partners, have led to a major development of ideas, so that an “ <i>Adopt a Home for Wildlife</i> ” legacy project that will continue beyond the reported project. Local land-owners, business people, community groups, schools etc are encouraged to volunteer to assist in some way (e.g. access approval, voluntary effort, funding, assistance in kind) to adopt a particular area and manage it under a plan agreed with the Project Officer under the auspices of project partner Montserrat National Trust. This embraces aspects like site-cleaning, removal of invasives, planting of native species (especially those threatened), installing interpretative materials etc. Already 2 sites are in progress and offers/negotiations are in progress for 5 others. Approximately 10 persons (or organisations involving many participants) are already active or expressed an interest. The project has helped secure additional resources not just from local businesses and persons but also secure a grant from the EU (€90k) for a native plant nursery which will supply plants to this subproject as well as other local people.
Activity 2.5 Providing modest increased local capacity to implement the above activities during the period of support by the project.		This has been achieved by the successful recruitment of a local Project Officer, who is well qualified, experienced and effective. Although his availability was not immediate at the start of the project, the quality of work has rapidly made up for this, despite problems in Montserrat’s infrastructure, particularly impacting power supply.
<b>Output 3.</b> Plan for the restoration and management of Montserrat’s Exclusion	3.1 Full local consultation system to input into an agreed plan for use of the	3.1 Full local consultation system established and first 2 workshops held, with wide cross-sectoral participation, and reports produced (evidence provided in

Zone	<p>Exclusion Zone, emphasising restoration of natural ecosystems developed.</p> <p>3.2 Information on the resources required (eg financial, technical assistance, other human resources) available.</p> <p>3.3 Volunteer expert input to the project achieved.</p> <p>3.4 Integrated plan for the environmental restoration and management of the Exclusion Zone produced</p>	<p>main body of report and in project reports and newsletters at Annexes 3 &amp; 5).</p> <p>3.2 This falls into the second year of the project, currently being planned in detail.</p> <p>3.3 Such volunteer input achieved to contribute to facilitation and reporting workshops, ecological and restoration aspects, and GIS analysis, as well as the donation of 12 high-resolution satellite images, which if purchased for commercial use, would have a value of over US\$55,000.</p> <p>3.4 This falls into the second year of the project, currently being planned in detail.</p>
Activity 3.1 Establish full local consultation system to input into an agreed plan for use of the Exclusion Zone, emphasising restoration of natural ecosystems		Cross-sectoral consultation system established, with strong Ministerial support, and first 2 workshops held, and reports produced.
Activity 3.2 Scoping of the resources required (eg financial, technical assistance, other human resources)		This falls into the second year of the project, currently being planned in detail.
Activity 3.3 Engage largely volunteer expert input (to combine with local knowledge) on ecological, restoration and external resourcing of major projects.		Such volunteer input secured to contribute to facilitation and reporting workshops, ecological and restoration aspects, and GIS analysis, as well as the donation of over US\$55,000 worth of satellite imagery from a normally commercial source.
Activity 3.4 Produce an integrated plan for the environmental restoration and management of the Exclusion Zone, as a basis for project development, resourcing and implementation beyond the present project, this to include also: determining cost effective methods for this, including field-work, remote-sensing (distant and/or close), monitoring, how to manage the existing abandoned farming elements, resources required etc		This falls into the second year of the project, currently being planned in detail.
<b>Output 4.</b> Project managed and delivered	<p>4.1 Reports and articles on lessons learnt on UKOTCF and other websites and social media, <i>Forum News</i> articles, presentations at meetings and conferences.</p> <p>4.2 Management of all aspects of the project, including local and remote</p>	<p>4.1 Dissemination of the project has included: a highlighted initial article on UKOTCF's web-site home page (still available in the back-listing on <a href="http://www.ukotcf.org">www.ukotcf.org</a>); 3 major articles and parts of several others in UKOTCF's <i>Forum News</i> (<a href="http://www.ukotcf.org/forumNews/index.cfm">http://www.ukotcf.org/forumNews/index.cfm</a>), which is widely read, as well as noted in many independent web and social-media sites, as well as UKOTCF's own; 3 articles in <i>Wider Caribbean Working Group eBulletin</i> (widely circulated (<a href="http://www.ukotcf.org/WGnewsletterlist/WGNewsletterslinks.pdf">http://www.ukotcf.org/WGnewsletterlist/WGNewsletterslinks.pdf</a>); and the first 3 issues project newsletter <i>Saving Our Special Nature of Montserrat</i></p>



	meetings.	<p>(<a href="http://www.ukotcf.org/WGnewsletterlist/WGNewsletterslinks.pdf">http://www.ukotcf.org/WGnewsletterlist/WGNewsletterslinks.pdf</a>); and 2 major interviews, as well as several news items on Montserrat's radio service, available across the world online.</p> <p>All copies of the project newsletter carry the logos of the Darwin Initiative of project partners. This applies also to all main articles on the project in <i>Forum News</i>, all project workshops, illustrated talks on the project (whether in Montserrat, UK or elsewhere), and any other opportunities.</p> <p>4.2 Two half-yearly physical project team meetings held, and over 20 Skype meetings of various project team groupings. Half-year and (this) 1-year project reports produced.</p>
Activity 4.1 Wider dissemination of lessons of use to other UKOTs and elsewhere		<p>2 major articles on the project in UKOTCF newsletter <i>Forum News</i>, as well as significant mentions in 2 other articles (in addition to general articles on <i>Darwin Plus</i> in most issues). <i>Forum News</i> is circulated widely in UK, UKOTs, CDs and elsewhere, with a basic circulation of over 500 copies, most of which have multiple readers and many are copied on. Many independent web-sites, list servers and social media routinely note these, vastly increasing the effective circulation. There was also a special announcement prominently flagged on the UKOTCF home-page (<a href="http://www.ukotcf.org">www.ukotcf.org</a>), with links on its social media sites, at the start of the project. The <i>Wider Caribbean Working Group eBulletin</i> (widely circulated in the Caribbean and elsewhere to over 90 active key persons) has carried 3 articles on the project in its first year. The first 3 issues of the project newsletter <i>Saving Our Special Nature of Montserrat</i>, circulated widely in Montserrat and elsewhere. This has been very well received, resulting in many unsolicited favourable responses.</p> <p>All copies of the project newsletter carry the logos of the Darwin Initiative of project partners. This applies also to all main articles on the project in <i>Forum News</i>, all project workshops, illustrated talks on the project (whether in Montserrat, UK or elsewhere), and any other opportunities.</p> <p>Most people in Montserrat (and many others including the large diaspora population) get their news from Radio ZJB (both broadcast and online). One of the most popular programmes is Rose Willock's Saturday morning discussion. During both project visits, the project team (Montserrat and visitors) have had prolonged interviews in the programme, and it has been arranged to repeat this during the third visit. In addition, there were several further interviews and other reports in the news bulletin, parts of which are syndicated across the region.</p> <p>The UKOTCF-network throughout UKOTs, CDs, UK and elsewhere is already being sensitised to the potentially wider benefits arising from this project, and this</p>

	will be utilised even more in the second year and afterwards.
Activity 4.2 Management of all aspects of the project, including local and remote meetings	<p>Management achieved, despite some long-term national infrastructure problems causing repeated power failures in Montserrat. Physical project meetings held at half-yearly meetings, and numerous remote meetings by Skype, supported by email and other electronic means.</p> <p>In addition to the planned substantial donation of resources by the project partners, the project has arranged for major additional outside contributions, valued at many times more than the Darwin Plus grant, but not accessible without it (see Activities 2.1. 2.4. 3.3 above).</p> <p>As requested by Defra, the programme has been adjusted to cope with the fact that the value of the grant has so far been reduced by about 15% due to the effective devaluation of the £ following the 'Brexit' vote. This has been achieved by relatively small adjustments to the work programme, extra donated work by UKOTCF and consequent movement of funds between sub-headings (so far within standard virement limits).</p>

## Annex 2: Project's full current logframe as presented in the application form (unless changes have been agreed) - – if appropriate

*N.B. if your application's logframe is presented in a different format in your application, please transpose into the below template. Please feel free to contact [Darwin-Projects@tsi.co.uk](mailto:Darwin-Projects@tsi.co.uk) if you have any questions regarding this.*

Project summary	Measurable Indicators	Means of verification	Important Assumptions
<b>Impact:</b> Ensured minimal negative impact on natural environment despite pressures of population concentration, and a start on facilitating natural restoration of natural forests and other habitats of the Exclusion Zone.			
<p><b>Outcome:</b> Island-wide ecological sustainability and endemic species-survival enhanced, despite interaction of volcanism and human-activities, through strategic planning and varied management approaches, and biological recording, in both open and Exclusion zones. (Max 30 words)</p>	<p>(Direct measurable biological results are impossible within the 2-year limit of current Darwin Plus projects. However, good indirect indicators are available: )</p> <p>0.1 Results of development proposals show that environmental sustainability is being taken into account.</p> <p>0.2 Human and supporting infrastructure improved</p> <p>0.3 Plan in place for resourcing and implementing an environmentally sustainable management plan for the Exclusion Zone, re-establishing natural forest</p>	<p>0.1 See 1.1 – 1.3 below</p> <p>0.2 See 2.1 - 2.5 below</p> <p>0.3 See 3.4 below</p>	As below
<p><b>Outputs:</b></p> <p>1. System in place to ensure that developments in the occupied zone take full account of maintaining the natural environment</p>	<p>1.1 Procedures and criteria set out.</p> <p>1.2 Environmental assessments available for development proposals.</p> <p>1.3 Decisions demonstrate environmental sustainability being taken into account.</p>	<p>1.1 Copy of procedures document.</p> <p>1.2 EIA documents for proposed developments.</p> <p>1.3 Records of planning authority decisions.</p>	<p>That severe hurricanes do not disrupt: Apart from very severe hurricanes (most recently in early 1990s), disruption tends to be short-term.</p> <p>That human-induced blockages do not disrupt: As finding ways to address these is a fundamental part of the project, major impacts are not envisaged.</p>
<p>2. Better local capacity to address development and conservation issues and support this by biological databases</p>	<p>2.1 Modified locally accessible database available and training in its use developed.</p>	<p>2.1 The modified locally accessible database, and project reports.</p> <p>2.2 Database populated with</p>	<p>Sufficient computing capability on Montserrat. Both the Montserrat Government Department of the</p>

	<p>2.2 Data entry for Montserrat invertebrate information held remotely and repatriation achieved.</p> <p>2.3 Local personnel trained in recording and data recording systems, and operating these.</p> <p>2.4 Information on current status of invasive plants in the open zone collated, and management and control plan developed and initiated.</p> <p>2.5 Local post filled and operational.</p>	<p>invertebrate information, and project reports</p> <p>2.3 Project reports and those of local partners.</p> <p>2.4 Invasive plants status document and project reports</p> <p>2.5 Project reports and those of local partners.</p>	<p>Environment and the Montserrat National Trust have adequate facilities and trained personnel.</p> <p>Qualified person recruited to local post. Although Montserrat has a small population, the skills and qualifications levels are high, so this should not be an issue.</p>
<p><b>3. Plan for the restoration and management of Montserrat's Exclusion Zone</b></p>	<p>3.1 Full local consultation system to input into an agreed plan for use of the Exclusion Zone, emphasising restoration of natural ecosystems developed.</p> <p>3.2 Information on the resources required (eg financial, technical assistance, other human resources) available.</p> <p>3.3 Volunteer expert input to the project achieved.</p> <p>3.4 Integrated plan for the environmental restoration and management of the Exclusion Zone produced</p>	<p>3.1 Consultation and workshop reports</p> <p>3.2 The Plan itself and project reports</p> <p>3.4 The Plan itself and project reports</p> <p>3.4 The Plan itself and project reports</p>	<p>That further volcanic activity does not cause disruption: The volcano has moved into a period of low activity in recent years, such that some restrictions in sectors of the Exclusion-Zone are being reduced. However, even increased volcanic activity would enable further assessment of the parameters.</p> <p>Local stakeholder participation is key, via a wide range of activities (workshops, consultations, etc.) Both the Government Department of Environment, the Montserrat National Trust, and other partners have an excellent record of participation in effective workshops and consultations.</p>
<p><b>4. Project managed and delivered</b></p>	<p>4.1 Reports and articles on lessons learnt on UKOTCF and other websites and social media, <i>Forum News</i> articles, presentations at meetings and conferences.</p> <p>4.2 Management of all aspects of the project, including local and remote meetings.</p>	<p>4.1 The reports, articles and presentations delivered.</p> <p>4.2. Interim and final reports on the project.</p>	<p>The project will be successfully delivered. All partners in the project have an excellent record of delivering project objectives, and managing required resources effectively and efficiently.</p>

**Activities** (each activity is numbered according to the output that it will contribute towards, for example 1.1, 1.2 and 1.3 are contributing to Output 1)

1.1 Developing and reviewing EIA screening criteria and programmatic reviews (sand mining, urban re-development, coastal development, tourism).

1.2 Developing criteria and indicators for monitoring ecosystem services based on supply, use and benefit, via Focus Group Discussions with representative beneficiaries (reflecting variation in age, gender, livelihood).and monitoring of ecosystem services and increasing local capacity for these, land-use planning, and biodiversity-inclusive risk-assessment.

1.3 Building on basic training delivered earlier to deliver training on the above and achieving strategic spatial planning for biodiversity, to include development of outcome-based indicators for threatened ecosystems and threatened and endemic species populations.

2.1 Modifying existing, tested biodiversity database-system for local use, but compatible with supporting wider systems.

2.2 Populating this database with initial content by repatriating of invertebrate data (survey and information basic to oriole and other bird conservation) from US and UK to Montserrat.

2.3 Training of local personnel, and support in the establishment of local recording and data recording systems.

2.4 Increasing local capability for conservation initiatives initially by developing an approach to removal of invasive plants and establishing a locally run system to promote and continue this.

2.5 Providing modest increased local capacity to implement the above activities during the period of support by the project.

3.1 Establish full local consultation system to input into an agreed plan for use of the Exclusion Zone, emphasising restoration of natural ecosystems

3.2 Scoping of the resources required (eg financial, technical assistance, other human resources)

3.3 Engage largely volunteer expert input (to combine with local knowledge) on ecological, restoration and external resourcing of major projects; .

3.4 Produce an integrated plan for the environmental restoration and management of the Exclusion Zone, as a basis for project development, resourcing and implementation beyond the present project, this to include also: determining cost effective methods for this, including field-work, remote-sensing (distant and/or close), monitoring, how to manage the existing abandoned farming elements, resources required etc

4.1 Wider dissemination of lessons of use to other UKOTs and elsewhere

4.2 Management of all aspects of the project, including local and remote meetings

### **Annex 3 Onwards – supplementary material (optional but encouraged as evidence of project achievement)**

List of further Annexes (appended in a separate pdf file):

Annex 3: the first 3 *Saving Our Special Nature of Montserrat* project newsletters: 1 (July 2016), 2 (October 2016) & 3 (March 2017)

Annex 4: Treweek Environmental Consultants: Consultant Report – Jo Treweek, Jennifer Hruza – Montserrat 29 November – 5 December 2016, UKOTCF Darwin Plus Programme, Planning & Environmental Management

Annex 5: Reports of cross-sectoral stakeholder workshops on the future of the south of Montserrat:

- Darwin Plus Supported Project: 'Maximising the long term survival prospects of Montserrat's endemic species and ecosystem services' – First workshop for all stakeholders to explore options for the future of the south of Montserrat, Wednesday 11th May 2016, 10:00am at Montserrat National Trust, Salem
- Darwin Plus Supported Project: 'Maximising the long term survival prospects of Montserrat's endemic species and ecosystem services' – Second workshop for all stakeholders to explore options for the future of the south of Montserrat, Friday 2nd December 2016, 10:00am at Montserrat National Trust, Salem

## Checklist for submission

	Check
<b>Is the report less than 10MB?</b> If so, please email to <a href="mailto:Darwin-Projects@ltsi.co.uk">Darwin-Projects@ltsi.co.uk</a> putting the project number in the Subject line.	Yes
<b>Is your report more than 10MB?</b> If so, please discuss with <a href="mailto:Darwin-Projects@ltsi.co.uk">Darwin-Projects@ltsi.co.uk</a> about the best way to deliver the report, putting the project number in the Subject line.	No
<b>Have you included means of verification?</b> You need not submit every project document, but the main outputs and a selection of the others would strengthen the report.	Yes
<b>Do you have hard copies of material you want to submit with the report?</b> If so, please make this clear in the covering email and ensure all material is marked with the project number.	No
Have you involved your partners in preparation of the report and named the main contributors	Yes
Have you completed the Project Expenditure table fully?	Yes
Do not include claim forms or other communications with this report.	