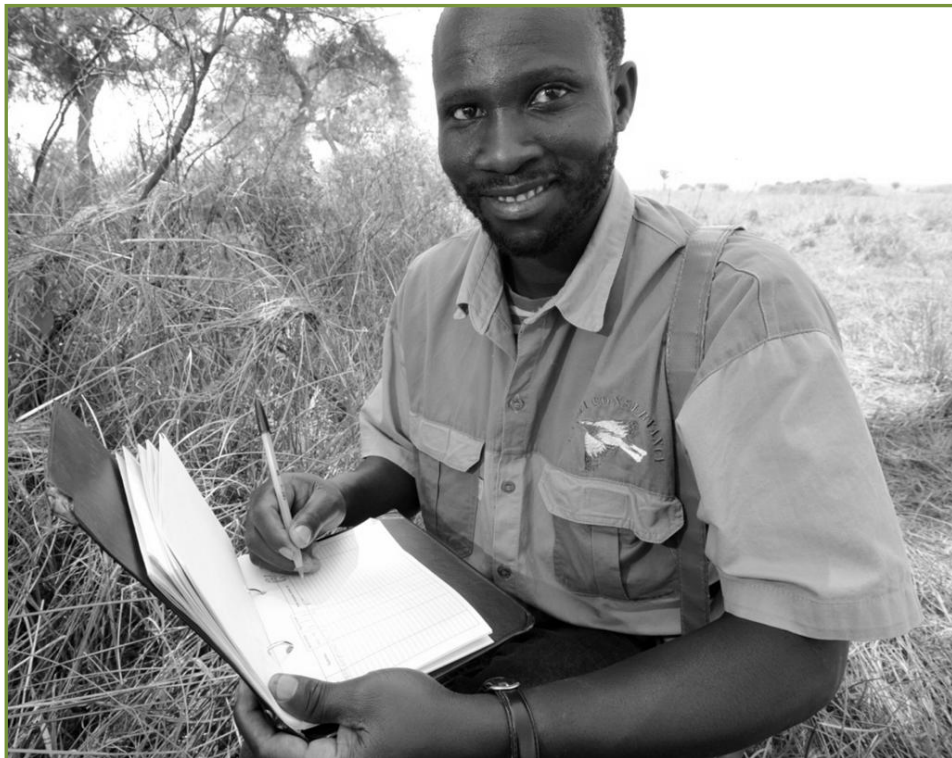


# NATURAL RESOURCE MANAGEMENT TRAINING

## Module 3.1: EVENT BOOK SYSTEM



## ACKNOWLEDGEMENTS

The materials used to develop this training module were developed and compiled by a number of individuals and organisations over the past 15 years as part of the Namibian CBNRM Programme. Acknowledgement is thus given to all contributing NACSO members, NACSO's international development support partners, and the individual and collective experiences of the NACSO members and partners who made the production of this module possible. The further development of the training material has been made possible with support from MCA Namibia.



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## GENERAL TRAINING TIPS

### Preparation:

- Prepare each session in advance and ensure all necessary materials and visual aids are available (use visual aids wherever possible to enhance your training).
- Be aware of local customs – remember to open and close the training day with a prayer and give due recognition to any traditional leaders present.
- Provide translation services where necessary (this will need to be arranged in advance – it may not be appropriate to ask a participant to translate).

### General training and presentation guidelines:

- Use good time management to ensure every aspect of your training is completed – but take into account the possible need for translation and be prepared to slow down if necessary to ensure that all participants understand.
- Maintain good eye contact with participants.
- Speak clearly.
- Keep your training language simple and appropriate to your audience.
- Bridge one topic to the next.
- Provide clear instructions for activities and check to see if your instructions are understood.
- Where appropriate, summarise each component of the module.
- Avoid reading from this trainer's manual.

### Visual presentation:

- Write clearly and boldly if using flipchart sheets.
- Keep your visual aids clear – avoid blocking participants' view of visual aids.

### Involving the participants:

- Encourage questions and participation.
- Ask questions to get participants thinking about the topic and key issues.
- Keep the group focused on the task, but take breaks if participants are tired and losing concentration – be aware of body language.
- Be patient and courteous with all participants.
- Talk to your participants and not to the flipchart.
- Acknowledge the comments and feedback from participants.



**NB:** Where we wish to indicate that text in this module refers to an activity that training participants are expected to undertake, we have employed this little icon.



## ABOUT MODULE 3.1: EVENT BOOK SYSTEM

<b>OBJECTIVES:</b> People who receive training in MODULE 3.1 will gain knowledge on:	<ol style="list-style-type: none"> <li>1. Choosing themes for monitoring</li> <li>2. Data gathering and recording</li> <li>3. Monthly reporting</li> <li>4. Annual collation and summary of data</li> <li>5. Reporting and analysing long-term trends</li> <li>6. Interpretation and use of data recorded (e.g., for quota setting and management interventions)</li> </ol>
<b>COMPETENCIES:</b> People who receive training in MODULE 3.1 will be able to:	<ol style="list-style-type: none"> <li>1. Record data and maintain data files on topics chosen by the conservancy</li> <li>2. Understand the use of trend data</li> <li>3. Complete monthly reporting charts</li> <li>4. Complete monthly reporting maps</li> <li>5. Complete red long-term trend reporting charts</li> </ol>
<b>MODULE 3.1 is intended for:</b>	Community Game Guards, the Conservancy Manager and the Management Committee
<b>Duration of MODULE 3.1:</b>	The training for this Module will usually last 8 days, spread over 18 months

The training of this **MODULE 3.1** will generally follow this schedule but please note that this sequencing should be regarded as indicative only as the final decision regarding what needs to be trained, and when, will depend upon the individual group or conservancy:

<b>TOPIC 1:</b>	Choosing themes for monitoring
<b>TOPIC 2:</b>	Data gathering and recording (yellow level) – the use of Event Books
<b>TOPIC 3:</b>	Monthly reporting (blue level charts and maps, Supervisor's Event Book)
<b>TOPIC 4:</b>	Institutionalisation – the use of red charts and the Chairperson's Control File
<b>TOPIC 5:</b>	Archiving
<b>TOPIC 6::</b>	Annual auditing
<b>TOPIC 7:</b>	Technical assistance and fixed route patrols



**NOTE:** Because training this module comprises several workshops over a number of years, your requirements (materials) will vary for each workshop.

**To train this MODULE 3.1 you will need to have (enough for everyone):**

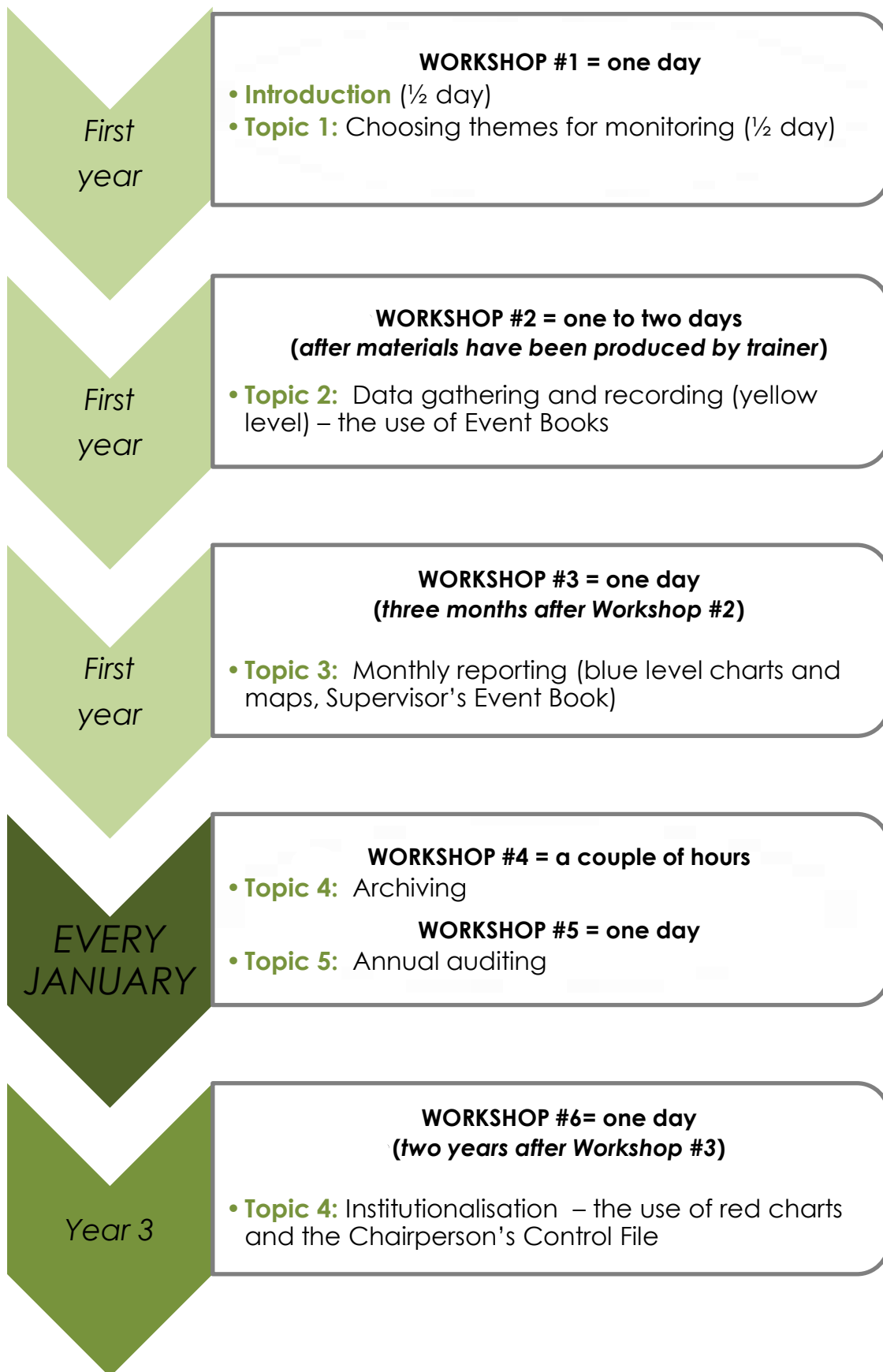
	<b>Check</b>
Flipchart stand, sheets and different coloured marker pens ("kokies")	
Module 3.1 Handouts #1 – #7	
Prepared Flipchart Sheets #1– #10	
Paper and pens for participants	
Enough blank yellow level Event Book data sheets for every participant (all modules)	
Enough blank blue level reporting charts for the individual conservancy	
Enough blank blue level reporting maps for the individual conservancy	
Enough blank red level reporting charts for the individual conservancy	
Laminated poster-sized event book data sheets (U1) (or prepared flipchart sheet)	
Laminated poster-sized Office Register data modules (U2) (or prepared flipchart sheet)	
Audit questionnaires (U3)	
Performance questionnaires (U4)	

<i>For demonstration purposes:</i>	
Event Books, office registers, blue and red reporting charts and filing box	
'Mind Map' poster, laminated (S1)	
Blue level reporting chart – completed for one year (S2)	
Blue level reporting charts – completed for several years (S3)	
Red level annual reporting chart (S5)	

<i>References/other resources:</i>	
'Implementation Manual for the Conservancy Monitoring System' (R1)	
'The Event Book System: A Community Based Natural Resource Monitoring System from Namibia' (R2)	
'MOMS Manual' (R3)	
'Adaptive Management' (R4)	
'Wildlife Monitoring' (R5)	



**Suggested flow of training workshops, Module 3.1**



**ONGOING (after Workshop #2)**  
**Topic 7:** Technical assistance and fixed route patrols



## KEYWORDS and ACRONYMS for this MODULE

<b>CGGs</b>	Community Game Guards
<b>ConInfo</b>	A data management tool for storing and managing conservation-related data
<b>EBMS</b>	Event Book Monitoring System
<b>MET</b>	Ministry of Environment and Tourism, Namibia
<b>Mind Map</b>	A diagram used to represent words, ideas and tasks, linked to and arranged around a central key word or idea
<b>MOMS</b>	Management Oriented Monitoring System
<b>NRM</b>	Natural resource management





## INTRODUCTION

- 1** **LIST:** The **overall objectives** of the Event Book System training module on a flipchart sheet (you may wish to prepare this in advance as Flipchart Sheet #1). Explain the objectives in detail. Explain to the participants that the training will be done in phases over several years.

**Objectives of this module: you will gain knowledge on –**

1. Choosing themes for monitoring
2. Data gathering and recording
3. Monthly reporting
4. Annual collation and summary of data
5. Reporting and analysing long-term trends
6. Interpretation and use of data recorded (e.g., for quota setting and management interventions)

- 2** **LIST:** The **competencies** of Module 3.1 by writing them on a flipchart sheet. To save time you may prefer to have Flipchart Sheet #2 prepared in advance.

**People who receive training in Module 3.6 will be able to:**

1. Record data and maintain data files on topics chosen by the conservancy
2. Understand the use of trend data
3. Complete monthly reporting charts
4. Complete monthly reporting maps
5. Complete red long-term trend reporting charts

- 3** **EXPLAIN:** The training for the Event Book System Module will follow this timeline. Draw the timeline proposed in the 'Implementation Manual for the Conservancy Monitoring System' (R1) on the flipchart sheet (or you may wish to prepare this in advance as Flipchart Sheet #3).



- 4** **EXPLAIN:** Here are the **objectives of this individual workshop**. We will review these at the end of this block of training to evaluate our progress towards achieving them. *Write the objectives for this Introduction session and the Topic 1 session on the flipchart sheet (or you may wish to prepare this in advance as Flipchart Sheet #4).*

**INTRODUCTION, Objective:**

**To provide background information and an overview of how the Event Book system works.**

**TOPIC 1, Objectives:**

- 1. To identify important natural resources and issues to enable participants to choose themes for monitoring**
- 2. To develop a 'Mind Map' for Community Game Guards**

**NOTE:** *If participants are unfamiliar with the concept of the Event Book system, you may wish to start the training by explaining in simple terms what the Event Book monitoring system is, and why it is important for conservancy natural resource management.*

**ASK:** **Can anyone say what monitoring is and why it should be done?**



*Ask participants as a group to consider this question, and then ask for participants to suggest answers while the rest listen and comment. Write contributions on a flipchart sheet under the heading 'Monitoring'.*


**EXPLAIN:**

- 1. Give a definition of monitoring (say that this is 'observing and writing work, not doing work'. Also note that monitoring is not research).*
- 2. Give reasons why monitoring is important (compliance issues, adaptive management etc.).*
- 3. Provide a brief outline of adaptive management emphasising the role of monitoring.*

**ASK:** *Participants to look at Handout #1 and lead them through a detailed discussion of this diagrammatic explanation of adaptive management.*



**ASK: How many of you have heard about the Event Book System?**

- 6  Ask participants as a group to consider this question, and then ask for participants to briefly describe where they have heard about the Event Book system, and in what context. Note contributions on a flipchart sheet under the heading 'Event Book system'.

**EXPLAIN:**

1. If participants are unfamiliar with the Event Book system, explain what the Event Book system is, and why it is useful. **NB:** Emphasise that with the EBMS, users decide what to monitor.

2. Distribute samples of an Event Book, Office Register, and blue and red reporting charts to participants and give them several minutes to look at these resources while you briefly explain what they are for.

- 7 **ASK:** Participants to look at Handout #2 and Handout #3. Explain in detail the contents of each Handout and before finishing this step, ask if any participants have any questions.


- 8 **SUMMARISE/LINK:** We have looked very briefly at monitoring and the Event Book system. Now we are going to look at how we choose themes for monitoring and how to create a 'Mind Map'.




## TOPIC 1: Choosing themes for monitoring

**ASK:** Participants to look at the flipchart sheet where you have listed the objectives for this workshop (Flipchart Sheet #4 if you have prepared it in advance). Remind them of the objectives for this topic.


**ASK: What are the important issues in the conservancy?**

- 1  To get this discussion going, ask participants as a group to think about what the main activities of the conservancy are, and then ask for suggestions (farming, tourism, crop-growing etc.). Note contributions on a flipchart sheet.

Now ask participants to brainstorm which natural resources and concerns/issues are important to them. As they do this, a volunteer should write suggestions in boxes on a flipchart sheet (this is the start of the 'Mind Map' activity). 


**ASK: What themes would you monitor for each of the issues?**

- 2 **EXPLAIN:** Although there are many resources and issues that may be important to your conservancy, we should first start by identifying a few priority themes for monitoring.

-  Participants should continue their group discussion and under each box created during the previous activity, a volunteer should note suggestions for detailed themes for monitoring.

**NOTE:** Do NOT tell participants what they should or should not monitor. Lack of 'ownership' of this process will ultimately lead to failure of the system and is the reason for the lack of sustainability in many monitoring projects.

- 3 **EXPLAIN:** Now we will evaluate the importance of each theme and decide on priorities for this conservancy:

-  Participants can rank themes in order of importance (hand out paper on which people list, say, 5 priority themes then collect them up and identify the principal ones for monitoring) OR participants can vote in a plenary whether a theme is of high (H), medium (M) or low (L) importance.

**NOTE:** Try to guide discussions subtly so that the final selection of themes is similar to (or the same as!) those being monitored in other conservancies but, importantly, do this without forcing the participants' final selections.



## 4 EXPLAIN:

1. The top-ranking themes will be the ones that will be monitored at this conservancy.
2. The 'Mind Map' that you have just developed will be made into a poster for display at the Conservancy Office – this is the basis for your monitoring.

**ASK:** Participants to look at Handout #4 (4 pages in total). Explain that these are examples of 'Mind Maps'. Discuss the various designs together.

## 5

**SUMMARISE:** We have looked at what themes we believe are important for monitoring in this conservancy. We have also done an activity where we designed a 'Mind Map'. Let's check that we have covered all the objectives for this block of training (refer to the list of objectives for this workshop). Does anyone have any questions?

### **TRAINER'S NEXT STEPS:**

1. Make a 'Mind Map' poster for this conservancy (S1) and have this laminated.
2. Design monitoring modules for Event Books and the Office Register based on the monitoring needs of this conservancy (this step will probably be unnecessary as issues in all conservancies are likely to be similar and full sets of materials are now available). Make sure that you bring along enough for each participant at subsequent workshops.
3. If possible, make posters of some of the Event Book modules for training. These must be laminated so that they can be written on and re-used. Alternatively, hand-draw Event Book modules on flipcharts for subsequent training.



## TOPIC 2: Data gathering and recording (yellow level) – the use of Event Books

- 1 **ASK:** Participants to look at the flipchart sheet while you list the **objectives for this workshop** (Flipchart Sheet #5 if you have prepared it in advance).

### Objectives of this workshop:


1. To introduce the Event Books and Office Registers (if applicable).
2. To show Community Game Guards how to fill in the data sheets modules.
3. To describe the rules for the Event Book and Office Register.
4. To show how the analyses (reporting charts) will be completed when data has been collected.


- 2 **ASK:** Participants to look at the hand-drawn flipchart sheet from the last workshop and the 'Mind Map' poster you have made (S1) for their conservancy.

### EXPLAIN:

1. In the previous workshop you selected monitoring themes and made a 'Mind Map'.
2. The top-ranking themes shown on your 'Mind Map' will be the ones that will be monitored at this conservancy.

- 3 **ASK:** Participants to look at the blank Event Book data sheets (yellow level) that you give them and the poster-sized Event Book data sheets (U1) that you display (or you can draw these on flipchart sheets instead).

 Participants should first suggest imaginary events while you all work together to input data on the poster-sized Event Book data sheets (U1). Volunteers should input the data.

- 4 Participants should next use imaginary events to fill in a blank Event Book data sheet now that they have been shown how it is done.  They should then repeat this for each module.

**NOTE:** Give participants plenty of time to do this and be sure to ask them if they have any problems or questions as it is important they understand fully how this process is completed.



**5** **EXPLAIN:** Events must be recorded in more than one module so, for example:

- If you find the carcass of a rare species that was killed by a predator, this event must therefore be recorded on both the mortalities sheet AND rare the species sheet (the predator is recorded in the predator module).
- If you find the carcass of an animal that has been poached, this must be recorded on both the mortalities and poaching sheets.



*Participants should input this additional information onto their relevant blank module Event Book data sheets. They should try to work out for themselves where this, and any other duplicate events, should be recorded.*

**ASK: What would happen if lots of you are at the same event, all recording it in your individual Event Books**

**6** **EXPLAIN:**

1. Because duplication of records would lead to an over-estimation of the event, it is important for only one of you to record it.
2. This is one of the rules of the Event Book System.
3. Those of you who did not record the event in your Event Book will not look lazy because you can write a note in your diary to explain the absence of information.

**ASK:** Participants to look at Handout #5 and explain all the rules outlined there. Refer to the rules as the 'Eight Commandments' and explain the meaning of each one and why it is listed.

**7** **EXPLAIN:** Because sometimes it's not possible for CGGs to get to the office in time to provide their information for the monthly reporting (blue charts), an 'Office Register' is used to store all the information from all the Event Books.

**ASK:** Participants to look at the poster-sized Event Book data sheets (U1) and the poster-sized Office Register (U2) data sheets for the same modules.



## 8 EXPLAIN and DEMONSTRATE:

1. I will use the imaginary data from earlier (or we can invent more) to show you how to transfer this information from the Event Books to the Office Register for each module (**NB:** *the data should be for several months*).
2. Now I will show you how to draw lines at the end of each month in the Office Register modules and to add up the data for that month (for transfer to the blue monthly reporting chart).
3. Lastly I will demonstrate how the information from the Event Books will be summarised in the reporting charts.

**ASK:** *Participants to look at a completed example of a blue level reporting chart (S3), completed for three years, to demonstrate how this information could be used.*

**NOTE:** *Human wildlife conflict modules usually raise more interest than others and help maintain participants' attention!*



*Participants should fill in the meeting form in their Event Book and have it signed – this is their first 'real' event record.*

- 9 SUMMARISE:** In this workshop we have looked at how to input data onto yellow level Event Book data sheets, and how such information is used to complete blue reporting charts. Let's check that we have covered all the objectives for this workshop (*refer to the list of objectives for this workshop*). Does anyone have any questions?

### **TRAINER'S NEXT STEPS:**

1. *Return to conservancy after 1 month to make sure there are no problems and people are filling in the Event Books correctly.*
2. *Return to the conservancy after a further 1 or 2 months to conduct training in monthly reporting (blue level analysis).*

**NB:** *It is crucial to provide frequent follow-up support at first to make sure that initial problems do not overwhelm Event Book users. Early assistance will lead to fewer problems later as users get more practice with the system.*





## TOPIC 3: Monthly reporting (blue level charts and maps, Supervisor's Event Book)

- 1 **ASK:** Participants to look at the flipchart sheet while you list the **objectives for this workshop** (Flipchart Sheet #6 if you have prepared it in advance).

### Objectives of this workshop:

1. To provide training in the use of the monthly (blue level) reporting charts
2. To show Community Game Guards how these charts can be useful
3. To provide training in the use of the reporting maps
4. To demonstrate the value of monitoring

- 2 **EXPLAIN:** To begin this workshop, we are going to look at our first subject: **monthly reporting charts**. I hope that you have brought along your Event Books and your EBS bag (if an Office Register is in use, it must also be produced).

**ASK: Has the information collected in the Event Books been passed on to anyone in the community?**



Participants briefly brainstorm together whether it was easy to tell people about the information collected in the Event Books. Note down responses on a flipchart sheet.

**ASK: Has anyone in the community been impressed with the work done using the Event Book so far?**



Participants briefly brainstorm together whether people in the community have said that they are impressed with the work done using the Event Books so far. Note down responses on a flipchart sheet.

- 3 **EXPLAIN:** In order to get the community involved in the Event Book system, it is important to have a user-friendly way of reporting the information collected in Event Books.




For one of the modules, get each of the participants in turn to call out the events recorded and show them how the monthly chart is completed by colouring in one block per event. (If the information has been copied into an Office Register then demonstrate how this is added up for each month and the relevant number of blocks coloured in.)



**4** **EXPLAIN:** As the columns are built up, they are telling a story (i.e., graphs are a way of showing real-life processes). However, mistakes can be made:

- If anyone is missing from the monthly analysis session, the monthly total will be lower than it should be.
- If more than one person records the same event (see 'Eight Commandments' Rule No. 3), the monthly total will be higher than it should be.


**5** **ASK:** Participants to look at examples of blue reporting charts (S3 and S2) to demonstrate interpretation of the graphs. Point out months of particular interest to show how the chart can give a clear picture of what is happening and enable communities to plan appropriate activities.

 Each participant should sign the supervisor's meeting form only when he/she has had all the events in the Event Book used to construct the reporting charts.

**6** **EXPLAIN:** To continue this workshop, we are going to look at our second subject: **monthly reporting maps**. (**NB:** The map training can be conducted during a support visit after the first year of implementation, however only train this subject if the CCGs are highly competent, i.e., this subject is *OPTIONAL*.)


**ASK:** Participants to look at Handout #6.

**ASK:** This map shows a concentration of poaching incidents in the west. What does this mean in terms of planning patrols?

 Participants should briefly study the map and offer suggested answers to the question you have posed. Note responses down on a flipchart sheet.

**EXPLAIN** Knowing where incidents occurred can be useful in planning where to maximise effort.

**7** **ASK:** Participants to look at blank blue level maps of the area that you will distribute for practice.

 Using data from their Event Books, participants should be shown how to mark events on their blank blue level maps. Remember that they must all record the meeting in their Event Books again.



8

**EXPLAIN:** To continue this workshop, we are going to look at our third subject: **the Supervisor's Event Book**. (NB: In conservancies that do not have Office Registers, this is a particularly important book for collating information from all the CGGs' books.)

Go through the Supervisor's Event Book step by step explaining:

- Where the various data come from, e.g., CGGs' Event Books, direct records by supervisor (e.g., rainfall).
- When the data should be entered, e.g., blue charts = monthly; hunting records = on hunt days, etc.

Explain that this book will be used for reporting to the Conservancy Chairperson and Committee when requested, and also for annual analysis and presentation at the AGM.

9

**SUMMARISE:** In this workshop we have looked at how to input data onto blue level charts and maps, and the Supervisor's Event Book. We also looked at how such information can be used. Let's check that we have covered all the objectives for this workshop (refer to the list of objectives for this workshop). Does anyone have any questions?

**TRAINER'S NEXT STEPS:**

1. Return to conservancy after 2 months to make sure there are no problems, people are still filling in the Event Books correctly, and they have managed to do the blue level analysis and mapping.
2. For the next few months try to return to the conservancy every month or two and then reduce the support visits to once every 3 or 4 months.
3. At the end of the first year, introduce the use of reporting maps.
4. At the beginning of Year 3, conduct training in the annual data analysis (red level).



## TOPIC 4: Institutionalisation – the use of red charts and the Chairperson’s Control File

- 1 **ASK:** Participants to look at the flipchart sheet while you list the **objectives for this workshop** (Flipchart Sheet #7 if you have prepared it in advance).

### Objectives of this workshop:

1. To provide training in the use of the annual (red level) reporting charts.
2. To involve the Conservancy Committee in the system
3. To stimulate the CGGs (data collectors) to continue to collect information in their Event Books
4. To demonstrate the use of information
5. To provide the Conservancy Committee with information that they can use to make management decisions

- 2 **EXPLAIN:** To begin this workshop, we are going to look at our first subject: **the annual analysis of data.**

**ASK:** Participants to look at the example of a completed red level annual reporting (analysis) chart (S5) and the blue level monthly reporting charts that have been in use for the past 2 years at the conservancy. You should also give them some blank red level reporting charts that you have brought along and explain what they are.

- 3 **EXPLAIN:** For each module, the annual chart is the same as the monthly chart except for the fact that the x axis represents ‘years’ instead of ‘months’.

1. Show participants how to add up the data in the monthly charts for each year and to fill in the blocks in the annual chart in the same way.
2. Discuss how the annual charts can be used to show trends both in wildlife populations and also in poaching and human wildlife conflict etc.

- 4 **EXPLAIN:** We are going to continue this workshop by looking at our second subject, **the annual analyses for long-term trends.**

**ASK:** Participants to look at Handout #7, which shows how data flows through the EBMS processes.



**5** **DRAW:** On a flipchart sheet draw a diagram of the data flow for the conservancy (based on the flow chart on Handout #7). You may wish to prepare this in advance as Flipchart Sheet #8 to save time.

1. Explain how the information flows through the system.
2. Ask the senior CGG to present the blue monthly charts and maps.
3. Show the Conservancy Committee how to interpret the charts.
4. Explain to the Conservancy Committee that to make sure the CGGs continue to collect information, they should ask for the blue charts every month.
5. Go through one of the modules from yellow to red levels getting the participants to do the additions from blue to red charts.
6. Get the most senior participant (Chairperson) to fill in the appropriate blocks on the red chart.

**NOTE:** Assist with this in a subtle way to make sure the chairperson isn't embarrassed by making mistakes.

**6** **EXPLAIN:** We are going to continue this workshop by looking at our third subject, **data interpretation and use.**

1. Examine long-term trends and identify points of interest.
2. Discuss the implications of the data and whether there should be a response. Examples are:
  - If there appears to be an increase in problem animal incidents, suggest that the monthly blue reporting charts and the maps will show when and where these incidents are occurring to make it possible to plan increased protection measures accordingly.
  - If there is a decline in a wildlife population, discuss the implications for hunting and suggest that for that species the quota applied for should be reduced (if there has been a serious decline, report to MET).
  - If there is an increase in poaching, use the maps to show the areas of concern and the conservancy can increase the patrols to those sites (and conduct awareness campaigns).
3. Discuss the possibility that the information is insufficient and propose remedies (e.g., increased numbers of CGGs or reduction of the CGG workload in other area or, for next year, starting to monitor some of the other modules).



**NOTE:** Use this opportunity to involve the whole Conservancy Committee in this function and to show the process to new committee members.

7

**EXPLAIN:** Now we are going to look at our fourth subject, **the Chairperson's Control File**. This provides the Chairperson with forms for recording important conservancy activities including Wildlife Utilisation and Management Plans, and wildlife management activities.

1. Explain how the Chairperson's Control File, along with the monthly reporting charts, enables the Conservancy Committee to check on and control the activities of the CGGs.
2. Point out that having information about all aspects of conservancy management at the Committee and Chairperson's fingertips is invaluable when negotiating with investors and donors.
3. Go through the file step by step, explaining how each entry should be made, why the information is important, and how it can be used:
  - The first part of the file deals with requirements for developing management plans – this will be dealt with when training for management planning.
  - It is possible to start right away with Section 1, No 4 and answer the questions relating to the query "is a natural resource monitoring plan in place?".
  - Where the answer to any question is "yes", place a tick in the "yes" column and answer the other 2 questions, "when" and "by whom" – otherwise leave the row blank.
  - Miss the next few questions and go to the section entitled 'Annual Tracking Report' – all that has to be done in this one is to label the top row with the year and insert a tick if the answer is "yes".
  - The remaining pages of the file comprise the red long-term reporting charts which need to be completed as described above.

8

**SUMMARISE:** In this workshop we have looked at how to use the information from the monthly reporting charts for long-term monitoring of trends. We also used the Chairperson's Control File to summarise information and determine the status of monitoring in the conservancy. Let's check that we have covered all the objectives for this workshop (refer to the list of objectives for this workshop). Does anyone have any questions?



## TOPIC 5: Archiving

- 1 **ASK:** Participants to look at the flipchart sheet while you list the **objective for this workshop.**

**Objective of this workshop: To store information safely for posterity**

- 2 **ASK:** Participants to look at the filing box and show the Supervisor and Conservancy Committee how the information should be filed in the appropriate yellow, blue and red files.

### **EXPLAIN** and **DEMONSTRATE:**

1. File all the Event Books and monthly reporting charts and maps from the previous year in the yellow and blue files.
2. If the annual long-term reporting charts are not being displayed, file these in the red archive file.
3. Additionally, file the Supervisor's Event Book, the Chairperson's Control File, and trophy records in the filing box.
4. Distribute new materials for the current year.

- 3 **SUMMARISE:** In this session we have looked at how to store all the information from the Event Book system in order to keep it safe for possible later use. Does anyone have any questions?

### **TRAINER'S NEXT STEPS:**

1. Conduct annual audits.



## TOPIC 6: Annual auditing

- 1 **ASK:** Participants to look at the flipchart sheet while you list the **objectives for this workshop**. (You may prefer to prepare this in advance as Flipchart Sheet #9.)

### Objectives of this workshop:

1. To go through the EBMS materials and identify where there might be problems and to plan refresher training if necessary
2. To check that data have been transferred correctly from yellow level data collection to monthly and annual reporting charts
3. To capture the data from the monthly reporting charts for use in ConInfo
4. To demonstrate the use of EBMS information and long-term trend data

- 2 **ASK:** Participants to take a look at the audit (U3) and performance (U4) questionnaires and make sure all the EBMS materials are available – Event Books, Office Registers, Supervisor's Event Book and Chairperson's Control File.

**NOTE:** Focus on the questions in the audit questionnaire. If the answer is 'yes' (i.e., they did monitor that theme) then the data need to be captured.

1. Introduce the two audit questionnaires. Explain that:
  - The first collects summary data that goes into ConInfo and constitutes the 'Annual Report'.
  - The second is the performance evaluation (the NRM performance), which asks whether each management activity has been conducted.
2. Get everyone to help the 'auditor' to write the information from those activities that have been carried out into the audit book.
3. Cross check the audit questionnaire with the 'Annual Tracking Report' in the Chairperson's Control File.
4. Demonstrate that the data have been copied without the EBMS materials leaving the conservancy and point out how the archived materials will be available later if there are any queries about the audit.
5. Inform the participants what feedback will be forthcoming (i.e., how many reports or posters will become available).
6. Establish who will be chosen to report the information from the EBMS to the AGM.
7. Now complete the NRM performance evaluation.





3

**NOTE:** Ask leading questions to ascertain how the conservancy has performed according to the criteria guidelines in the performance review questionnaire. For example:

- *Commitment to Natural Resource Management.* Ask how many staff are employed by the conservancy for protecting natural resources and then ask if they are full-time or part time.
- *Planning* – ask to see the management and zonation plans; ask how many NGOs are involved in making decisions regarding management activities.
- *Monitoring* – you can assess this yourself from what is available and by asking to see the various outputs.
- *Management* – ask simple questions like “how many illegal incidents were there this year?”.
- *Resource Utilisation* – this is obvious: ask if there was income from natural resources and find out where it came from.
- *Resource Sustainability* – ask if the members or CCGs feel there are declines; if there are blue and red charts use these to determine whether there are declines, stability or increases.

4

**SUMMARISE:** In this session we have conducted a full audit and reviewed the natural resource management of the Conservancy. Let's check that we have covered all the objectives for this workshop (refer to the list of objectives for this workshop). Does anyone have any questions?



## TOPIC 7: Technical assistance and fixed route patrols

**NOTE:** Although this topic is placed at the end of the main training topics, follow-ups should take place within a month or two of the initial yellow level training, and on frequent successive occasions. Fixed route patrols should also be introduced fairly early in the training (say after 3 months) but not at the same time as other yellow level training as there are different rules which may cause confusion.

- 1 **ASK:** Participants to look at the flipchart sheet while you list the **objectives for this workshop**. (You may prefer to prepare this in advance as Flipchart Sheet #10.)

### Objectives of this workshop:

1. To provide support to Event Book users
2. To identify and rectify problems
3. To provide training in the use of the fixed route patrol book

- 2 **EXPLAIN:** To begin this workshop, we are going to look at our first subject: **technical assistance**.



*Make sure participants have their materials with them (if they haven't, remind them of 'Eight Commandment' Rules 1 and 2).*

- 3 **EXPLAIN:** We are going to check the Event Books and Office Registers for compliance with the rules, especially:

- Records of a single incident duplicated in more than one book or in the Office Register (Rule No. 3).
- Pages removed and tidiness (Rules 6 and 7).
- Information transfer to the Office Register (where one is in use).

- 4 **EXPLAIN:** We are going to check Event Books and Office Registers for:

- Correct duplication of records such as predators and problem animals; mortalities and poaching; mortalities and predators.
- Correct transfer of data from Event Books to the Office Register (where applicable).



- 5 Check that the blue monthly reporting charts have been completed correctly.

**ASK:** Participants if they have had problems with – or don't understand – any of the data sheets. Where there have been problems, go through the data sheet/s in question step by step to clarify how it is meant to work.

- 6 **EXPLAIN:** To end this workshop, we are going to look at a final subject: **fixed route patrols.**

**NOTE:** By using imaginary data, you will demonstrate how differences in effort can make apparent trends meaningless.

1. Explain why it is important to get information about wildlife population trends (for setting quotas, monitoring sustainability, and picking up problems with population health).
2. Explain how it is difficult to compare information from patrols that have taken different routes and different distances over time.
3. Show participants how to enter information in each part of the fixed route patrol data sheets.
4. Get the trainees to choose a route for their fixed route patrols. This should be a reasonable length (e.g., 10 – 20 km if on foot), covering important wildlife areas, and not crossing itself anywhere.
5. Draw the route on a map.
6. Point out that these patrols are only done, say, once a month, so Rule No. 2 doesn't apply.



Remember to check with participants that their meetings module is completed at the end of the session!

- 7 **SUMMARISE:** In this session we have shown how to get information on trends and population health, and looked at how to conduct fixed route patrols. Let's check that we have covered all the objectives for this workshop (refer to the list of objectives for this workshop). Does anyone have any questions?



## List of Handouts that you should make available for this Module

MODULE 3.1, HANDOUT #1: Diagrammatic explanation of adaptive management

MODULE 3.1, HANDOUT #2: Event Book basics

MODULE 3.1, HANDOUT #3: Event Book basic training (5 pages in total)

MODULE 3.1, HANDOUT #4: Mind Map examples (4 pages in total)

MODULE 3.1, HANDOUT #5: EBMS Rules

MODULE 3.1, HANDOUT #6: Example of a blue level reporting map

MODULE 3.1, HANDOUT #7: Data flow chart

Also make sure to bring (at the appropriate stage of the module training):

- Enough blank yellow level Event Book data sheets (all modules) for each participant
- Enough blank blue level (monthly) reporting charts for each conservancy
- Enough blank blue level (monthly) reporting maps for each conservancy
- Enough blank red level (annual) reporting charts for each conservancy

All Handouts are one page only, unless otherwise specified. Please make sure that you make enough copies for each trainee.



# NOTES



