

**Strategies for
Integrated Development Concepts
on Sustainable Tourism
GUIDELINES and TEMPLATE**

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Univ.Prof. Dipl.-Ing. Dr. Ulrike Pröbstl-Haider
Institute of Landscape development, Recreation and Conservation planning
BOKU - University of Natural Resources and Life Sciences, Vienna

Michael Meyer
CEEweb for Biodiversity
Ecological Tourism in Europe

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1. Introduction and Theoretical Background

Attempts to planning and strategy building can be initiated from different perspectives. One can start from analysing problems and needs or focus on strengths and opportunities. Looking into the related literature it is better to focus on the latter.

The so-called strengths-based approach has its origins in community psychology (McCammon, 2012) and focuses on capacity building and competence enhancement with local people, encouraging communities or partners to valorise, identify and mobilise existing but often unrecognised assets (Mathie & Cunningham, 2003). Contrary to the rather negation-oriented need-based view, a strengths or asset-based strategy encourages communities to build an inventory of their assets and see value in resources that would otherwise have been ignored, unrealised or dismissed (Rönkkö & Aarrevaara, 2017).

The literature review revealed that setting focus only on the deficiencies and problems easily inflicts a 'surrender mentality', is demotivating and tends to create a narrative that the involved partners start to accept as a given situation. Mathie & Cunningham (2003) argue that focussing on strengths and assets is more likely to inspire positive action for change than analysing needs and problems only.

Introducing the strengths-based view to the sphere of sustainable tourism planning similarly contains the basic premise that it enhances the feeling of the people involved that they can drive the development process themselves by identifying and mobilising existing but often unrecognised assets.

However, focussing on advantages and strengths may also contain risks (Rönkkö & Aarrevaara, 2017). If the strengths-based approach is misunderstood as deliberate manipulation or colonisation of the material and cultural resources, it might ultimately lead to commercial overexploitation, not just regarding natural resources but also of the local culture and heritage.

2. Strengths based Strategy Building

As mentioned before, the strategy should be based on the strengths and opportunities. Within the INSIGHTS project several tools have been provided to analyse the respective strengths and weaknesses: First by applying the self-assessment tool explained in the “Self-assessment manual” and filling in the provided templates, and second within the workshops and partner meetings. The elaborated “Methodology of INSIGHTS workshops” was especially designed to insure the valuable exchange with other partners to recognise main assets and get ideas for strategic development.

When preparing a meeting on strategy building it is strongly suggested to start with looking at the strengths and opportunities again and summarise the findings from the previous meetings.

Figure 1 shows the overall development of tools and outcomes. The overall goal is the development of new products to strengthen the sustainable tourism offer in the respective partner regions.



Figure 1: Tourism planning steps within the INSIGHTS project

2.1 Recall the Results of Strengths and Opportunities

At the beginning of the strategy development the main findings on strengths and opportunities need to be compiled and presented to the stakeholder involved.

The basis for a successful strategy and its implementation is an early stakeholder involvement. Within the INSIGHTS project helpful information on stakeholder involvement has already been provided with the “Practical manual on how to set up and operate the regional stakeholder groups”.

Stakeholders in sustainable tourism management planning are all the individuals who are interested in and/or affected by tourism development and biodiversity conservation. They should participate in the planning process from the early stage.

Sustainable tourism development emphasises in particular the importance of considering and respecting the wishes and needs of the local population of the tourism destination. The goals of sustainable tourism development can only be achieved if the people involved in tourism in the area commit themselves to the vision of sustainable tourism development.

When discussing your previous findings, the following aspects are important:

Strengths

- “Which are the region's features that can foster tourism development?”

Opportunities

- “What are the opportunities for sustainable tourism development?”
- “What are the current and possible positive impacts of tourism development and tourism activities?”

Furthermore, the outcome of the visioning process should be added and discussed in this context. The following questions might be helpful:

- “Does – in the context of strengths and weaknesses – the realisation of the vision require a significant change or a continuation of the existing path?”
- “Does the vision belong to those aspects where strengths have been discovered or does the vision touch a different field (e.g. strengths in conservation, vision on economic benefits)?”
- “Is the vision matching the perceived areas with strengths and opportunities (is it broadly defined or narrowed down)?”
- “Do all members of the stakeholder meeting have mainly the same understanding about the vision and the strengths for future tourism development?”

Self-assessment leads to ...



... common visions and ideas for objectives.

Figure 2: The development of visions and objectives needs to be based on a self-assessment

A common vision adopted by all stakeholders and the local public is the best way to guarantee the successful implementation of the tourism management plan.

This discussion not only leads to the adoption of a common vision, but should also identify priorities and major concerns which should be integrated into the tourism planning. They can also provide ideas for the strategy which will derive from the vision and for their implementation.

These ideas can then be used in the next steps of the planning process.

2.2 From Vision to Strategic Goals

Once a common vision is created, the next step is to break down this vision into different goals which, when accomplished, will make the vision come true. The main questions to be asked during this process are:

- "How can we accomplish our vision?"
- "What are the requirements for a successful implementation?"
- "What are the desired and expected effects for current and future tourism development?"

If, for example, the vision might focus on the *"Tourism development which enhances the economic benefits based on nature experiences, related activities and exploring the region's historical treasure"*, the goals for working towards this vision may be:

- Supporting the region's tourism sector in focusing on infrastructure allowing the access and experience of nature such as hiking trails, canoeing options or biking trails, nature experience trails or new initiatives using geocaching as a tool to get tourists into nature,
- Enhancing the offers to explore historic sites by new web-based tour descriptions, and a new blog in cooperation with a regional newspaper,
- Establishing consultancy and support for existing opportunities for overnight stays to make the stay more attractive and to achieve a prolongation of the stay.

These overall three main strategic goals should on the one hand reflect the vision and be precise enough to be achievable in a realistic period of time (up to five years) on the other. It is crucial that these goals are not contrary to the overall aim of sustainable tourism development. This can be avoided by referring to the vision which is based on this aim. Based on these three overarching goals nine objectives and concrete projects for the work program might be developed (see next section).

3. Strategic Goals and Objectives for Implementation

3.1 Specifying Strategic Goals

To achieve the strategic goals, each goal needs to be specified and broken down into one or more objectives. As the previous example shows one can think about several opportunities to fulfil the goals and the overall vision. Therefore, the planning team should discuss and consider different objectives that might be suitable to achieve the respective strategic goal.

In a first step the whole range of possible objectives should be collected and summarised in cooperation with local stakeholders (see Figure 3).

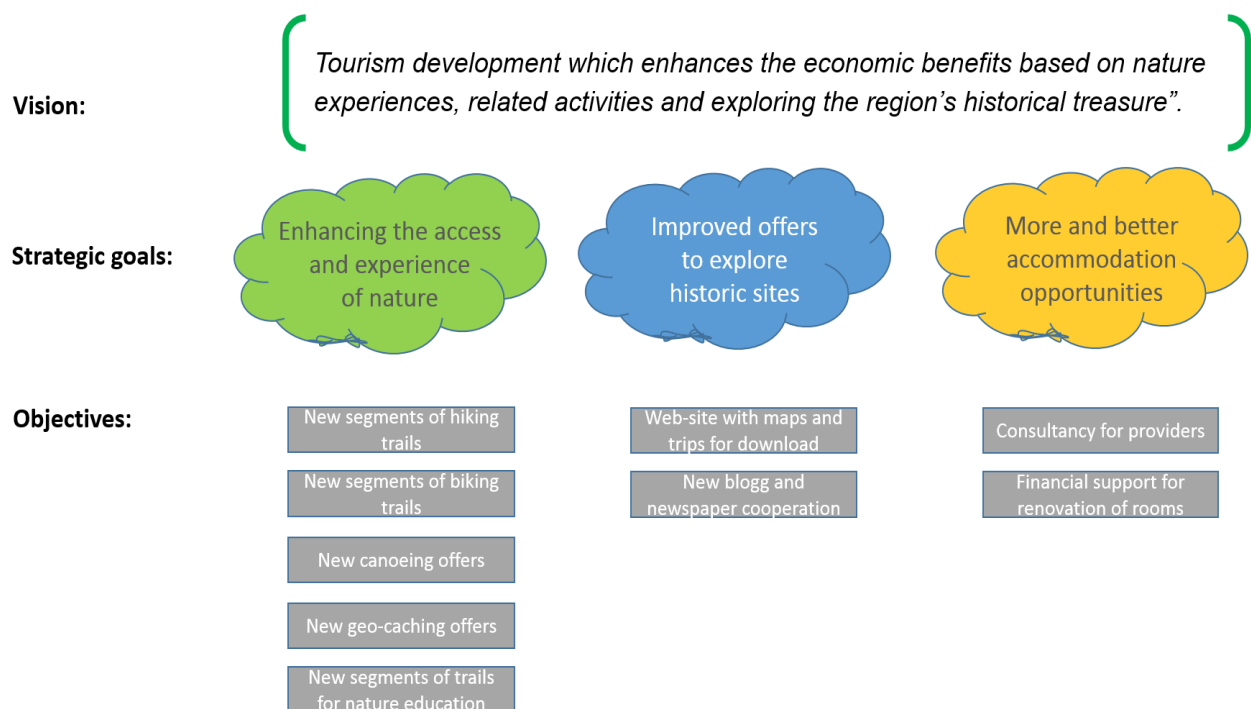


Figure 3: Specification of the strategic goals by defining related objectives

As Figure 3 shows, each strategic goal might be achieved by several different objectives. Furthermore, the different objectives require a different precondition such as amount of time, money, cooperation partners and efforts to be implemented. Therefore, the objectives defined need to be prioritised and classified accordingly.

The following questions might be used to support the ranking and prioritising process:

- “To what extent does this objective support the strategic goal and the overall vision?”
- “For which projects are funding opportunities available? Which projects can be implemented without funding?”
- “Which projects are of high, medium or low priority to achieve the strategic goals?”
- “Which objectives are easy and fast to achieve?”
- “Which outputs do we expect from the respective objective?”
- “Where is the ideal location for the respective objectives?”
- “What additional requirements need to be considered when implementing the respective objective such as political, legal, organisational, informative, economical, aspects and resources?”
- “Which partners, persons or institutions should or must be involved?”

The following Figure 4 shows an example for the ranking of the already defined strategic goals taking these questions into account.

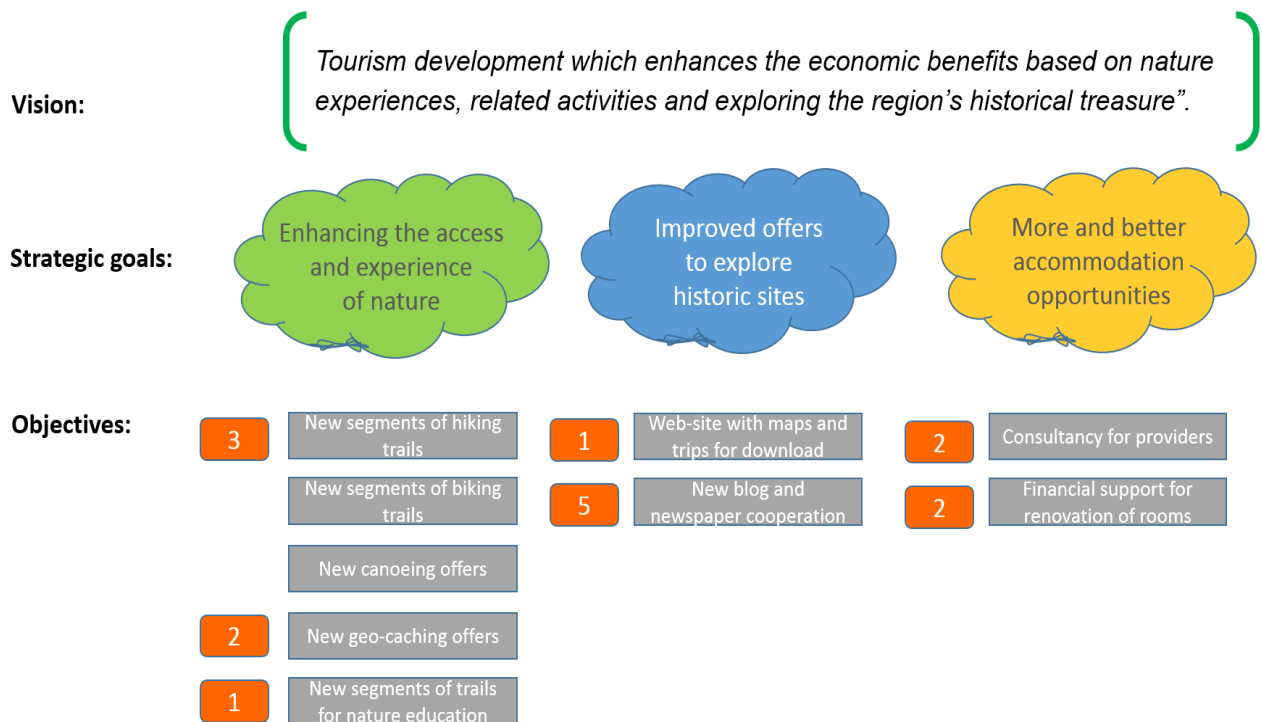


Figure 4: Example of ranking the compiled objectives from 1 (very important) to 5 (less important)

Finally, the proposed objectives can be grouped into programs and main activities. The agreed objectives will be integrated into the overall work and action plan of the tourism management concept. At this stage of planning, it is important that proposed programs and activities are realistic and not idealistic.

It is of vital importance that priorities, the timescale, responsibilities and finances for each of the objectives are clearly defined.

To agree on the strategic goals and objectives, stakeholder meetings and workgroup discussions are suitable means. The further the planning process advances, the more discussions and decisions will be prepared in smaller stakeholder groups and then finally decided within the multi-stakeholder group. Not every detail of the plan needs to be discussed and decided on by the general public. It is, nevertheless, important to inform all stakeholders and the public about discussions and the decision-making process should be transparent.

3.2 The Work and Action Plan

To implement the objectives, a detailed work and action plan has to be created. It should describe the goals, objectives and each single task necessary to achieve them. The single tasks for the objective "creation or improvement of an attractive trail system with different hiking and educational trails", for example, might include:

- Compilation of information about the existing trails and their evaluation,
- Understanding the demand of existing or new target groups,
- Understanding of the current use level and the expected one,
- Allocation of a contract to an expert (team) to develop proposals for a new trail system,
- Publishing proposals based on stakeholder involvement,
- Adoption of a proposal,
- Implementation of the proposal: construction work of the trail and the information system (e.g. signposts), design and printing of maps and promotion material,
- Maintenance of trails and information system,
- Planning and organising of the opening event.

For the management, work and action plans are helpful tools. The difference between the two are described in the following¹: A work plan template is designed to break down a large project goals into smaller, actionable steps. This kind of template outlines what needs to be done, by whom, and when. It also includes a timeline to help set expectations and improve

¹ See <https://www.smartsheet.com/why-smartsheet>

Action	Responsible	Priority	Status	Start Date	End Date	Notes
Goal #1: Select Venue						
Identify venue options	Sally J.	High	Complete	9/30	10/2	
Visit venues	Sally J.	High	Complete	10/5	10/9	Must send contracts by 10/10
Sign contract	Maria S.	High	Complete	10/12	10/12	
Goal #2: Secure Speakers						
Recruit speakers	Sally J.	High	In progress	10/7	10/12	
Speaker bios	Sally J.	Medium	Not started	10/12	10/14	
Create and send speaker packets	Maria S.	Medium	Not started	10/13	10/16	Send to stakeholders
Confirm speakers	Sally J.	High	Not started	10/17	10/18	
Goal #3: Recruit Sponsors						
Identify sponsors	John S.	High	In progress	10/13	10/19	
Write up sponsor agreement	Maria S.	Medium	Not started	10/15	10/16	
Send emails	John S.	High	In progress	10/19	10/21	
Make cold calls	John S.	Medium	Not started	10/21	10/23	From sales team
Goal #4: Promote event						
Create banners	Morgan K.	Low	Not started	10/26	10/28	
Order swag	Morgan K.	Low	Not started	10/28	10/28	Coffee mugs, totes, pencils
Create social media strategy	Corrine J.	Low	In progress	10/13	10/26	
Make marketing materials	Karen Z.	High	Not started	10/26	10/30	

Figure 6: Example of an action plan (for a local event² focusing on responsibilities, planning status and time planning. Further aspects might be included such as costs and reporting and monitoring duties.)
(© smartsheet)

To develop work and action plans, the following aspects should be considered:

Time Schedule

Exact start and finishing date of the activity, these are set by calculating the duration which is needed to implement or accomplish the desired objective, considering

- the circumstances in which the activity takes place (e.g. seasonal aspects, dependency from other factors, objectives which need to be finished previously, etc.),
- the capacity of those implementing the objective.

Even if the exact deadlines and the overall timetable is difficult to be determined and foreseen it should be estimated and a deadline should be set by which the activity should be finished the latest.

Costs

Exact expenses to accomplish and maintain the activity, including

- salaries,
- costs for material resources,
- travel expenditures,
- etc.

² See e.g. <https://www.smartsheet.com/top-excel-project-plan-templates>

Cost calculation must consider in detail all costs from each part of the activity such as preparation, inventory, transaction (negotiations, contracts), notification, implementation and reporting.

Resources

Identification of financial resources:

- Amount of existing internal resources: financial resources that are provided by the organisation implementing the activity (e.g. the tourism association),
- Amount of external resources: financial resources that are allocated from elsewhere (regional or national administration, regional, national or international funding programs, donations, etc.).

Identification of other resources (e.g. sponsoring opportunities, real estate, material):

- Amount of the implementing organisation's in-kind contribution,
- Amount of other resources provided from external parties such as for the elaboration of detailed tasks for an objective.

The resulting resource plan should state clearly which resources are already available and which still need to be obtained and how they will be obtained.

Responsibility

Those who are responsible for the implementation of the work and action plan, the resource management and the related marketing action should be identified and listed. The clear identification of the organisation and/or the individuals that are responsible for the implementation of the activity should contain

- an exact description of the respective tasks,
- the contract or other form of commitment (e.g. protocols, letter of intention),
- the requirement and responsibility for a supervision or final approval,
- marketing activities,
- monitoring and reporting duties.

Reporting and Monitoring

A tourism management plan or strategy is only as good as its implementation. Constant monitoring, which is clearly defined in the plan and follows standardised procedures, is the only way to control whether the intended outcomes of the plan are achieved and whether the tourism management is successful. Funding also often requires reporting and documentation of the implementation and various phases. The planning concept should therefore include any forms and deadlines for reporting and documentation as well as for monitoring and evaluation procedures. The tourism strategy should also include an approval system for reporting measures.

For the internal monitoring, which is helpful to measure the success of new products, concepts and management actions, we propose to use the self-assessment tool and compare the result of the first assessment with the current status. It is important for the learning experience to see in which segments (e.g. environmental improvements, visitor experience, economic benefits) were achieved and to discuss against this background the next steps.

4. Defining New or Diversified Tourism Products

The objectives are the basis to develop new offers and products for the visitors to the destination. The new objectives and the existing infrastructure such as accommodation, restaurants, shops, museums etc. should be combined to

- diversify and enhance existing tourism products,
- create new products.

Figure 7 summarises the expected effects on existing markets, clients and target groups on the one hand and possible new markets, client and target groups on the other.

Offers	Existing markets existing clients / target groups	New markets / clients / target groups
Existing products	Market Penetration Modification of existing products for an existing market	Market development New positioning of an existing product in order to attract a new market / new target audience
New products	New Development Introduction of new products for an existing market	Diversifikation Introduction of a new product for a new market and a new target group

Figure 7: Possible achievements by product development (after Komppula, 2001: 9)

In the final phase this integrated view is required and should be discussed analysing the previous experiences and the desired and/or expected effects of new objectives. Figure 7 is also useful for the monitoring process and the analyses whether the objectives have been successful to attract more visitors and/or additional target groups.

5. Checklist

For the series of workshops the project team needs to organise, the following checklist might be helpful:

1. Recall all results on strengths and opportunities based on the self-assessment and the walk-shops.
2. Present the vision in the context of strengths and opportunities and develop strategic goals.
3. Specify the strategic goals by a list of possible objectives.
4. Analyse the objectives against different criteria such as time, costs, location, partners needed etc.
5. Prioritise the most important objectives.
6. Develop a work and action plan defining who is doing what, when and where including time constraints, costs, resources, responsibilities, reporting and monitoring duties.
7. Combine the objectives with existing offers and infrastructure to create new or diversified tourism products.

6. Annex

Template for Strategic Goals and Work Planning

1. Purpose of the Document

Maximum ½ page

2. Description of the Regional Vision, its Strengths and Opportunities

Maximum 1 page

Can be adapted from your status quo reports and the visioning process.

3. Description of the Stakeholders and the Way of their Involvement

Maximum 1 page

Composition of the stakeholder groups in the region (clusters)

4. Steps/Procedure Towards the Definition of Strategic Goals

Maximum 1,5 pages

How many/how long/which kind of workshops were necessary?

Preselection of the most preferred goals.

Explanation of the final version.

5. Presentation of the Strategic Goals and the Related Objectives

2-5 pages

Documentation of the list of potential objectives, the prioritisation process and result with explanation of pros and cons.

6. Work and Action Plans for the Main Objectives

5-10 pages with short description and detailed information about responsibilities, time planning and deadlines, costs, resources, reporting and monitoring duties.

Annexes

List of stakeholders: List of stakeholders who actively participated in the strategic process

Agenda(s) of the meeting(s): Agenda(s) of the workshop(s) in which the strategic goals were developed together with the stakeholders, and in which the objectives have been defined and in which the work and action plans have been finalised.

7. Literature

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