grassroots
young entrepreneurs in eco-health tourism

www.**ecohealthforyouth**.com

The Collaborative Guide
Modules
The theoretical background
of the Co-creation Guide

CONTENTS

01 | Context Analysis

1.1

Who are stakeholders?

Stakeholders are individuals, groups, organizations that may, either directly or indirectly **affect**, be affected by ; **influence** or be influenced by a **decision**, **activity**, **outcome** or **performance** of your project, either positively or negatively.[1]
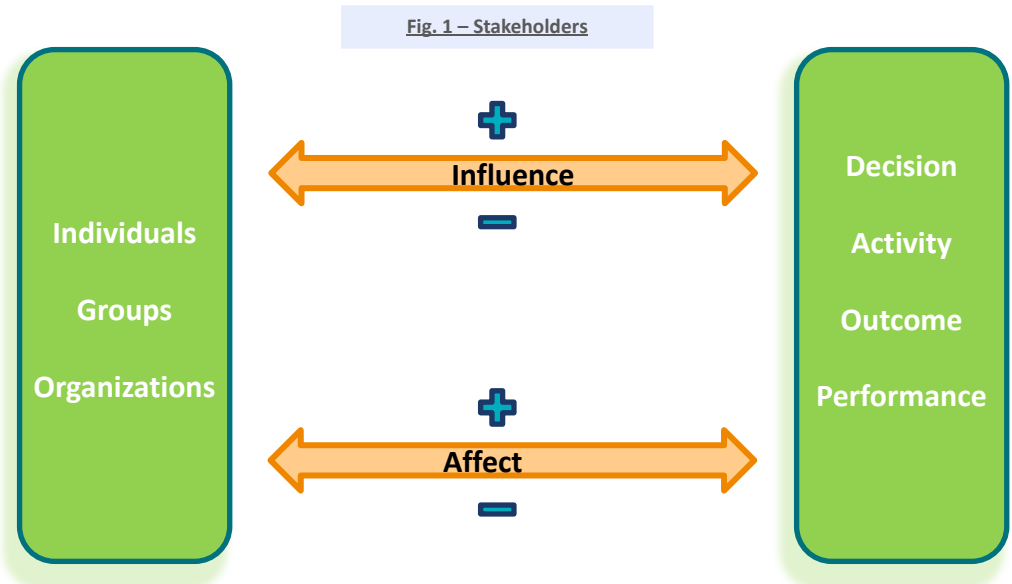
Fig. 1 – Stakeholders

Individuals	Influence	Decision
Groups		Activity
		Outcome
Organizations	Affect	Performance

[1] Project Management Institute, *The Standard for Project Management – Seventh Edition, 2021*, p.31

1.1

Who are stakeholders?

Projects are performed
by people and for people.

A **project** can have a small group of **stakeholders** or a big one. They can be different in each phase of the projects and their influence, power or interests may change.[2]

Working with stakeholders to maintain alignment and engaging with them to foster **positive relationships** and **satisfaction** is one of the performance domains.

Throughout the **different phases** of the project, the **level of engagement** from the stakeholders are therefore crucial to deliver value and guarantee the results you are looking for.

To **engage effectively** is one of the main principles of project management. Engaging stakeholders proactively and to the degree needed **contribute to project success and customer satisfaction**.[3]

[2] Project Management Institute, *The Standard for Project Management – Seventh Edition, 2021*, p.31.
[3] Project Management Institute, *op.cit.,* p.31.

1.1

Who are stakeholders?

How to engage stakeholders effectively?

Fig. 2 – Stakeholder engagement model [4]

Team members
Sponsors
Targets
Beneficiaries
Local communities
etc

Power
Impact
Influence
Expectations
Interests
Proximity
etc

Identify

Analyze

Monitor

Engage

Prioritize

Degree of satisfaction?
Need to change engagement strategy?

Working collaboratively
Elicit requirements
Manage expectations
Resolve issues
Negotiate
Decision making

Common to focus on the stakeholders with the most power and interest

1.2

Stakeholders analysis tools
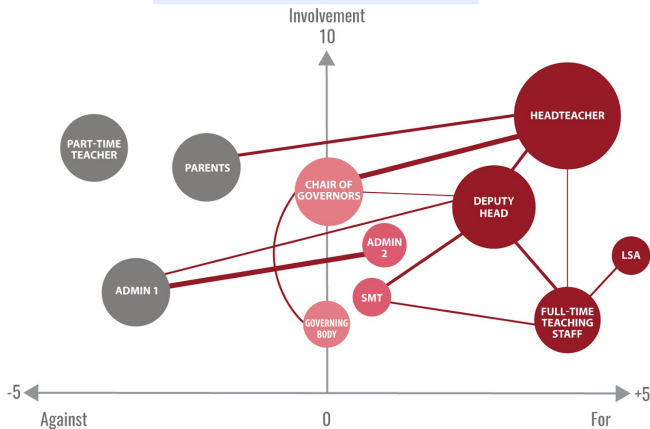
Stakeholder analysis is a **method** of gathering and **analysing quantitative and qualitative information** to determine whose interests should be taken into account throughout the project. [5]

What place left for nature and local ecosystems in your analysis ?

Stakeholder mapping is a **collaborative research of process,** debate and discussion that draws from multiple perspectives to determine a key list of stakeholders to prioritize.

Step-by step guide here

It is a **visual outpu**t that can help you to <u>Assess</u> the situation
<u>Prioritize</u> some stakeholders
<u>Keep</u> them engaged

Different **models**, **methods** and **digital tools** (e.g: miro, mindtools, mural, …) are there to **help** you. It's up to you to find one tailored for your project !

Find out more here

Fig. 3 – Stakeholder mapping [5]

7

[5] https://www.henricodolfing.com/2018/03/a-step-by-step-stakeholder-mapping-guide.html

1.3

Project management

The application of **knowledge**, **skills**, **tools**, and **techniques** to project activities to meet project requirements.[6]

It refers to **guiding** the project work **to deliver** the intended outcomes.

Project teams can achieve the outcomes using a broad range of **approaches** (e.g predictive, hybrid, adaptative).

It means that as a **project manager**, it is essential to :

- **Clarify the roles** distributed among the different members of the team but also to design the project accordingly,
- **Plan** the different **phases** of the project and the tasks attributed to everyone,
- **Establish milestones** (outcomes) and **deliveries** (outputs) and monitor the whole through the project management software of your choice.

[6] Project Management Institute, *A Guide to the Project Management Body of Knowledge (PMBOK® Guide) – Seventh Edition*, 2021, p.4

1.3

Roles in project management

Manager

Oversees the entire project from start to finish. Defines project goals and creates plans. Allocates resources and ensures the team stays on track. Manages budget, risks, and timelines.

Team members

Carry out day-to-day tasks to complete the project, collaborate and report progress. Contribute expertise to ensure project success.

How is project team development managed? Organizational tools to manage team development? Special training needed for the team?

Stakeholders

Have a vested interest in the project's outcome. May include customers, suppliers, regulatory bodies, etc. Defines project objectives and requirements. Approves the final product or service.

Customers

Defines project objectives and requirements, approve the final product or service.

Project Management Office (PMO)

Develops standards and policies for project management. Supports project managers and archives project data.

Steering Committee

Provides governance and oversight. Ensures projects align with organizational goals

Sponsor

Provides financial and organizational support for the project. Makes critical decisions on resources and budget. Communicates project progress to stakeholders.

Manager

Oversees the entire project from start to finish. Defines project goals and creates plans. Allocates resources and ensures the team stays on track. Manages budget, risks, and timelines.

1.3
Project management

The different **phases of the lifecycle** are flexible and highly dependent on your project and the **development approach** you selected.

*A **method** used to create and evolve the product, service, or result during the project life cycle, such as a predictive, iterative, incremental, adaptive, or hybrid method.* [7]

[7] PMI, *A Guide* (…) , p.33
[8] https://projectmanagement.ie/blog/project-management-methodologies/

Fig. 4 – Development approach [8]

Waterfall
A linear sequential design process, originating in software development process.

- Able to define detailed requirements for the future
- No or minimal change
- Need robust documentation
- Know design constraints & dependencies (before defined)

Analyse → Design → Develop → Test → Deploy → Operate

Agile
A project methodology and approach that is derived using Lean thinking.

- Define vision
- Start in broad direction
- Learn and adapt
- Evolve towards target

Scrum
A lightweight framework that helps people, teams and organisations generate value through adaptive solutions for complex problems.

Kanban
A project management system that utilises visual cues to help workers stay on track and complete tasks.

Extreme Programming (XP)
XP is a lightweight methodology **for small to medium sized teams developing software** in the face of vague or rapidly changing requirements.

Lean
Lean project management is the application of lean manufacturing principles and practices to the software development domain.

Five Lean Principles

Further info and discussions on the different approaches and their sub-categories

1.3
Project management

When designing a project you have to agree upon a **development approach**, establish the **phases** of your project, their **milestones** and **deliverables** and establish a clear **schedule**.

Let's use an example with the **Waterfall** design, a **predictive** and **linear** approach :

Fig. 5 – Waterfall approach [9]

Waterfall

A linear sequential design process, originating in software development process.

- Able to define detailed requirements for the future
- No or minimal change
- Need robust documentation
- Know design constraints & dependencies (before defined)

Analyse → Design → Develop → Test → Deploy → Operate

This project is composed of **6 consecutives phases**. With at least one milestone and one deliverable for each. They help **tracking progress** and ensure project completion.

Milestone act as **checkpoints** (event, completion of a phase, deliverable accomplished) that indicate when significant phases or tasks have been completed, helping to manage timelines and expectations.[10]

Deliverable is any unique and verifiable **product, result, or capability** to perform a service required to complete a process, phase, or project. It is an **output** produced during the project

*How can we take **sustainability** into account for each phase ?*

[9] https://projectmanagement.ie/blog/project-management-methodologies/

[10] PMI, *A Guide* (…) , p.33

1.3

Project management

When designing and planning, it is crucial to establish a **schedule**.

A **schedule** is a **model** for executing the project's activities, including durations, dependencies and other planning information. Schedule planning can use **predictive** or **adaptive** approaches.[11]

Predictive approaches follow a stepwise **process** as follows:

1. *Decompose* the **project scope** into specific **activities**.
2. *Sequence* related activities.
3. *Estimate* **effort**, **duration**, **people**, and **physical resources** required to complete activities.
4. *Allocate* people and resources to the activities based on availability.
5. *Adjust* the **sequence**, **estimates**, and **resources** until an agreed-upon schedule is achieved.

Which tools to help you design, track progress and monitor your project ?

[11] Project Management Institute, *A Guide (…)*, p.58

1.3

Project management

Project Management **softwares** are powerful allies in your tasks and a lot of them use GANTT charts.

They are numerous, it's up to you to find the one matching with your needs and budget !

List (non exclusive) and comparaison

GANTT chart

Step-by-step guide

A Gantt chart is a **visual project management tool** that represents a project schedule. It typically consists of **two sections**: a **vertical axis** listing tasks or activities and a **horizontal timeline** showing the duration of these tasks.

It gives you a **clear overview** of the project,allow you to **split tasks** between members of your team, makes it easy to **track progress** and therefore to **monitor** the project.

Fig. 6 – GANTT Chart

Task Name	Q1 2019			Q2 2019		Q3 2019
	Jan 19	Feb 19	Mar 19	Apr 19	Jun 19	Jul 19
Planning						
Research						
Design						
Implementation						
Follow up						

1.4

Mission & vision

Establishing both a clear **mission** and **vision** is vital for successful project management. They help ensure that all team members understand their **role**, **responsibilities**, and **how** their work contributes to larger objectives.

Understanding the **differences** between them is crucial for **guiding** project teams and **aligning efforts** toward common goals.

Examples of mission and vision statements.

Fig. 7 – Mission and vision

Mission	Vision
Focus on today and what you do to achieve it What is the project, who it serves, how to achieve objectives?	Focus on tomorrow and what you want to become Why does the project exists? What ultimate impact it seeks to create?
Specific and actionable Defines the scope and objectives of the project Provides clarity on the project's benefits and value	Inspirational and broad in scope. Motivates team members with a sense of direction. Envisions long-term goals and aspirations.
"To develop a community park that promotes health and wellness by providing recreational facilities for local residents."	"To create a vibrant community where all residents have access to green spaces that enhance their quality of life."

02 | Values & Objectives

2.1

Target or… Beneficiary?

Classic established categories make distinction between **targets** and **beneficiaries**, two **essential components** of project management, serving **different roles**.

A **clear distinction** between these two categories is useful to **address needs** and **measure impact** accurately.

Targets focus on those who **implement** or **influence change**, target groups being those engaged in activities aimed at achieving project goals.

Beneficiaries are those who directly **gain** from the **project's outcomes**, those who experience the benefits.

However, with an eco-health project, you should take into consideration the **potential overlap** for some of them.

This overlap is **common** in **community-focused** projects where individuals or **groups targeted** for specific actions also stand to **benefit from the outcomes** of those actions.

Understanding these **dynamics** is crucial for effective project design and evaluation in sustainable tourism initiatives. This project **Grassroots** is also an invitation to **reconsider** the **role of your beneficiaries.**

Is your experience designed for customers only ?
Could they play a more active role in your project ?
What about nature? What its place?
Local environment/ecosystem as a beneficiary?

2.2

What is an empathy map?

One of your main beneficiaries is the **customer** who is also the **end-user** of your project, the experience you will design for them**.**

The **empathy map** is mainly used in UX (user experience) design. It was created by Dave Gray and popularized in the book *Gamestorming* (2010)

This **collaborative visualization tool** can help you in the **design** of a touristic and cultural experience, starting from the **customer** and its **behavior**, **feelings** and **needs**.

It helps teams understand and **empathize** with users by organizing insights about their **thoughts**, **feelings**, **needs** and **behaviors**.

Guiding decision-making processes and ensuring that projects **align** with the true **needs of users**.

By integrating empathy mapping, you can create more **effective** and **impactful** solutions. It is also useful when thinking about the **touchpoints of an experience** as we will see later.

2.2

What is an empathy map?

This tool is widely used to create a **comprehensive view** of the **user's experience.**

Holistic approach helps team understand users on **multiple levels**, facilitating better **design decisions** that resonate with user needs.

Feels

Highlights the **emotions** users experience in relation to the product or service. Understanding these feelings helps teams **address pain points** effectively.

Does

Outlines the **actions** users take in their interactions with the product or service, including **behaviors** and **habits** that influence their experiences.

Says

Captures direct **quotes** and **statements** from users during interviews or surveys. It reflects what users explicitly express about their **needs**, **preferences**, and **challenges**.

Thinks

Represent the user's **thoughts** and **beliefs** that may not be directly articulated but are inferred from their behavior or context. It provides insight into their **motivations** and **concerns**.

Fig. 8 – Empathy and map

2.2

What is an empathy map?

Step-by-step guide and misuses
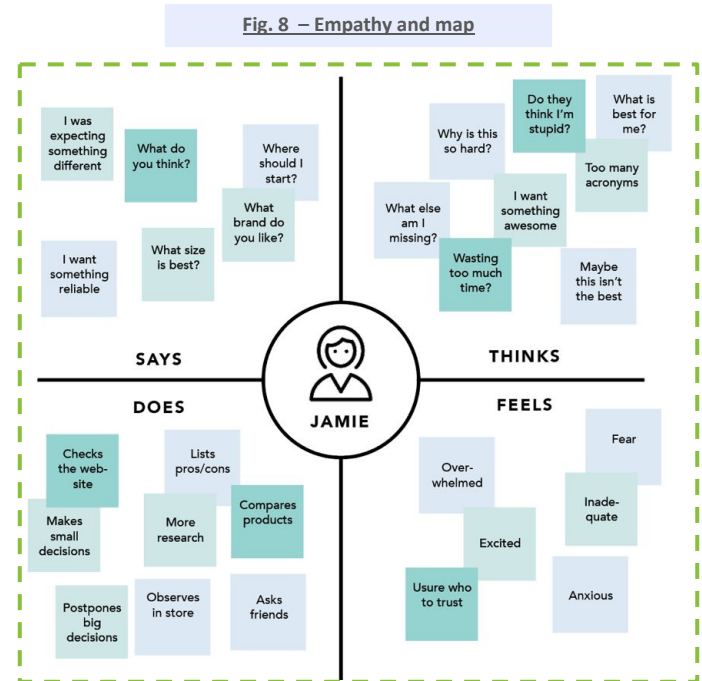
Another approach is used in marketing or community management where **external influences** are considered to be critical.

Auditory and **visual elements** provide a broader context for understanding behavior, making it particularly useful for analyzing how external factors shape user experiences.

Aspect	Traditional approach	Alternative approach
Focus	Thoughts and emotions	External influences (hearing/seeing)
Quadrant Structure	Says Does Thinks Feels	Say & Do Think & Feel Hear See
Application	Primarily in UX design	Marketing, Community engagement
Insight Depth	Deep emotional understanding	Contextual understanding of influences

2.3

S.M.A.R.T. Objectives

S
Specific
Concrete and tangible
Why ? Who ? Where ? Resources required ?

M
Measurable
Criteria for measuring progress and success
Quantifiable target to know when the goal is achieved

A
Achievable
Challenging but attainable
Given the people, technology and environment

R
Relevant
It matters to you/your organization
Align with broader goals and strategic objectives

T
Time-bound
Deadline and timeline of progress milestones

2.4

Strategic Value Proposition

The **value** created during a project can be of **different nature**. It could be a new product or service, a way to sustain benefits from previous projects, etc

A **strategic value proposition** is a clear statement that outlines the **unique value** a company offers to its customers, differentiating it from competitors and addressing specific customer needs.

It serves as a **guiding principle** for a company's strategy, aligning its operations, marketing, and product development with the expectations and desires of its target market.
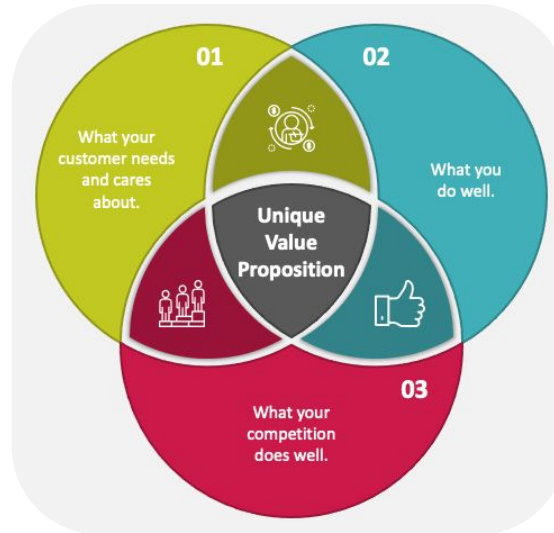

Fig. 9 – Value

How do you stand out ?

Comprehensive guide here

2.4

Strategic Value Proposition

01 - Target Audience

Identifies specific **customer segments** interested in eco-tourism (environmentally conscious travelers, adventure seekers, families looking for educational experiences, corporate groups seeking team-building activities in nature, ..)

Customer Needs

Defines the problems or desires that the company seeks to address for its customers. Designing the empathy map can help you clarify this part.

02 - Value Delivery

Explains how you will deliver this value to customers, including aspects like pricing, quality, and customer service.

- ♻ **Sustainable practices** such as renewable energy sources and minimizing waste
- ♻ **Partnership with local communities** to share the benefits of tourism and preserve cultural heritage
- ♻ **Educational** programs to (local) environment issues

03 - Unique offerings

Services distinct from competitors, emphasizing unique features. Highlights what set eco-health tourism appart form other options.

Competitive Advantage

Articulates why customers should choose your experience over others in the market.

- 🌳 Commitment to sustainable practices and certifications from NGOs
- 🌳 Strong community involvement
- 🌳 Unique experiences that conventional tourism can not provide

Fig. 9 – Value

2.4

Strategic Value Proposition

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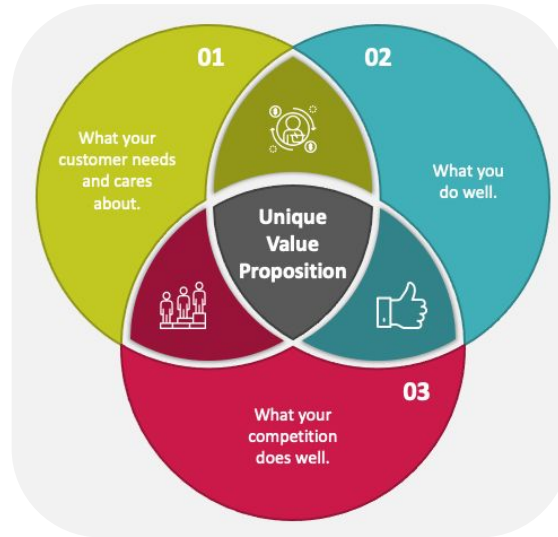

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2.4

Strategic Value Proposition

Guides Decision-Making

A clear value proposition helps **align all aspects** of the eco-tourism project—from marketing strategies to operational practices—ensuring they reflect the **commitment to sustainability** and **community engagement.**

Enhances Marketing Efforts

It serves as a **foundation for marketing messages** that resonate with environmentally conscious travelers, highlighting unique experiences and ethical practices.

Increases Customer Loyalty

By clearly articulating how the eco-tourism project meets customer needs while promoting environmental stewardship, it **fosters trust and loyalty** among visitors who share similar values.
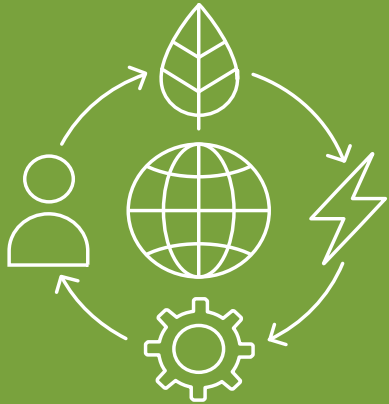
Supports Business Growth

A compelling value proposition c**an attract new customers** who are increasingly seeking responsible travel options while retaining those who appreciate the project's commitment to sustainability.

How is value measured?
Are there measures for financial value and nonfinancial value?

03 | Experience Design

3.1

Touchpoints of an experience

Touchpoints are critical interactions between a customer/user and a brand or a project during its journey.

Understanding touchpoints is crucial because they shape the overall **customer experience**. Each **interaction** can influence **satisfaction**, **loyalty**, and **advocacy**. Positive experiences at touchpoints can lead to repeat business and referrals.

When, **where how** and **why** do we meet exactly ?

Reflecting on these touchpoints helps us understand and design those moments, to guarantee the best experience possible. Once again, we need to **understand** your main **beneficiaries** and wear their shoes. To do so, we can split the experience into **three main phases** :

1. Pre-experience
2. During the experience
3. After the experience

As categories, it also helps to think in terms of :

Physical touchpoints
Digital touchpoints

Fig. 10 – Touchpoints of customer journey on leisure farm [10]

Periods	Touchpoint	
pre-service	word of mouth: others' recommendations	information on website
	telephone consultation with customer service staff	
in-service	pickup service	guiding signs for entrance
	activity advertising	tickets
	parking lots	sanitary facilities
	barrier-free facilities	accommodation
	bicycle renting	conference rooms
	photograph shooting area	recreational pavilions
	landscaping design	tourist service center
	mobile staff	tour guidance
	outdoor activity teaching	shows and performance
	entertaining area for children	getting close to animals
	farm picking activities	experiencing producing agricultural products
	DIY activities	outdoor picnic area
	BBQ area	camping
	outdoor selling area	theme restaurants
	gift stores	exits/parking lots
	online stores	online comments
post-service	word of mouth: recommending the farm to others	

[10] Bagul, A., Din, S., "Developing Success Indicators for Ecotourism Site", *World Applied Sciences Journal*, 34 (12) : 2016. Link

3.1

Touchpoints of an experience

Interactive
Guided tours
Community workshops

Creative
Photo scavenger hunt
Art in nature installations

Accessible
Multilingual toolset
Adaptive equipment

Playful
Nature-themed games
Interactive storytelling sessions

Empathic
Cultural exchanges programs
Feedback loops, ..

Educational
Workshop on local conservation efforts
Interactive learning stations, ..

Transformative
Reflection spaces,
Post-experience follows-up

Regenerative
Tree planting initiatives
Sustainable practives workshops

Typical Customer Journey Map and Points of Engagement

3.1
Touchpoints of an experience

Feedbacks loops and **actionable insights** for improvement.

Ultimately, **connecting** touchpoints with motivations helps improve the **quality** of your project, its **services** and your **deliveries**.

Once again, **understanding** the motivations, desires and needs that drive your potential **customers is key**.

Fig. 11 – Touchpoints, needs and opportunity on leisure farm (11)

	Touchpoints	Visiting Motivations	Tourists' Needs and Expectations	Goals of Touchpoints	Innovative Design of Opportunity Points
pre-service	word of mouth: others' recommendations information on website telephone consultation with customer service staff	word of mouth and others' recommendations	to find a suitable leisure farm quickly	to let tourists decide to visit the farm with expectations	a. developing online applications b. encouraging people to share visiting experience with others on social media c. develop media for sharing experience d. complete farm map and information of tour planning
in-service	pickup service guiding signs for entrance activity advertising tickets	tourism facilities	to reach the farm easily and know the activities on the farm	to let tourists participate in more interactive activities so that they can share their experience with others, to stimulate consumption on the farm and farm product sales, and to collect tourists' information for future contact	a. guiding signs b. advertising strategy c. ticket booking d. recommended visiting routes
	parking lots sanitary facilities barrier-free facilities accommodation bicycle renting conference rooms		convenient and perfect public facilities	public facilities should meet tourists' demands and provide them with a good visiting experience	a. stylized parking lots b. personalized sanitary facilities c. differentiated accommodation space
	photograph shooting area recreational pavilions landscaping design	relaxation and to enjoy countryside scenery	to relieve themselves, get relaxed, and have unforgettable memories	to let tourists write comments on social media to increase the farm's popularity	a. more space for relaxation b. facilities for interactive activities c. subtly implanting the farm brand on social media to increase the popularity of the farm
	tourist service center mobile staff	customer service/cultur	to solve problems in time, be familiar	to solve problems for tourists during	different routes to the farm, information about the farm

3.3

Reflexion on a experience

In order to **maximize value** for your customer and **social** and **ecological impact**, it can also be useful to think about what your experience brings to customers but also what they could bring or have brought to your experience, be it **positive** or **negative**, **tangible** or **intangible**.

It can allow you to take some precautions, think about **potential synergies** between different stakeholders and categories of customers and maybe integrate some of those information in your **key performance indicators**.

Here a list of **examples** :

	What do they bring home ?	
	Positive	**Negative**
Tangible	Souvenirs or local crafts ➡ *Support local artisans and economies*	Stolen objects or plants ➡ *Environmental degradation of the area*
Intangible	Memories of unique experiences ➡ *Satisfaction and likelihood of repeated visits* New knowledge about local culture and/or ecology ➡ *Increased environmental awareness and good practices*	Negative experiences, shared through word of mouth *Bad reputation and no future interest* Misconceptions about local customs or practices ➡ *Potential cultural insensitivity or disrespect*

3.3

Reflexion on a experience

	Positive	Negative
What do they leave behind ?		
Tangible	Donations to local conservation efforts ➡ *Direct support for environmental initiatives* Art, tools, techniques ➡ *Collab w/ artists, artisans, for virtuous dynamic*	Waste, litter and pollution (house, pathways, forest,) ➡ *Harm to local ecosystems and wildlife*
Intangible	Positive feedback and testimonials ➡ *Enhanced credibility and attraction for future visitors* Cultural exchange, sharing thoughts and ideas ➡ *Enrichment of local culture, ties and opportunities.*	Negatives attitudes or behavior (entitlement,..) ➡ *Deterioration of community relations* Cultural appropriation or exploitation ➡ *Erosion of cultural integrity and trust*

04 | Digital Dimension

4.1

Digital touchpoints of an experience

How to make the best out of digital tools ?

Sticking to our three phases, some examples

Before the Experience

Websites & Apps - Provide detailed information about the eco-tourism offerings.
Social Media Campaigns - Engage potential visitors with content (photos, videos).
Email Marketing - Send personalized offers and information to interested travelers.

Build anticipation and excitement.
Educate potential visitors about sustainability practices.

During the Experience

Mobile Apps - Offer interactive maps, guides, and real-time information.
Augmented Reality (AR) - Enhance learning about local flora/fauna through AR experiences.
Feedback Tools - Allow visitors to provide instant feedback via apps or kiosks.

Enhance visitor engagement and education.
Foster a deeper connection with nature.

After the Experience

Follow-Up Surveys - Gather feedback through to improve future experiences.
Social Media Sharing Options - Encourage visitors to share their experiences online.
Newsletters/Blogs - Share stories and updates about conservation efforts post-visit.

Maintain engagement with visitors.
Promote repeat visits and referrals.

4.2
Types of contents

Here we will focus on **three** types of content

Informative
Selling
User-generated

But you can also consider different channels of communication according the type of content (promotional, selling, dissemination/education)

Informative

Before	During	After
Blog Posts travel tips, local wildlife, conservation efforts **Videos/Webinars** eco-tourism, local culture, environmental issues	**Mobile Apps** real-time information, local flora and fauna **Interactive Maps**	**Follow-Up Emails** **Blog Recaps** stories on experience and impact on local efforts

Selling

Before	During	After
Promotional Emails special offers **Landing Pages** pages for experiences with clear calls to action.	**In-App Purchases** services or products **Limited-Time Offers** deals or upgrades	**Loyalty Programs** rewards for returning visitors **Referral Discounts**

User generated

Before	During	After
Social Media Campaigns share excitement using a specific hashtag **Photo Contests** of user's past eco-tourism experiences	**Live Social Media Feedback Tools** reviews or share their experiences immediately	**Testimonial Features** reviews, stories on your website/social media **Photo Sharing Campaigns** Guests post moments using a specific hashtag

4.4
Metrics

A **metric** is something you want to measure, what you measure it with and its visual representation (graphs, charts,..)

You could **measure** a lot of **different things** on different aspect, including :

Deliverables   Team-work   Stakeholders   Value   Impact

for **multiple reasons**, including :

Evaluating performance compared to plan;
Demonstrating accountability
Assessing if deliverables will deliver planned benefits
Tracking use of resources, work completed, budget expended, etc.;
Providing information to stakeholders;
Ensuring deliverables will meet customer acceptance criteria

Keep in mind that for each one of this measurement you need :

A **method** and a **tool** tailored to this aspect (i.e design the metric)
A **set of data** to gather, keep up to date, process
Time and resources to **interpret** and **analyze** the results

During the **planning** phase, **metrics**, **baseline** and **thresholds for performance** are established in order to check that everything is on track and to help achieve your goals.

4.4

Metrics

Only measures what matters
Metrics are simply measures that have no real use unless and until they are used.

Keep it to the essential.
A balanced set of metrics for an holisitic view of the project without overflowing people with information.

 Step by step guide KPI

Key Performance Indicators (KPIs)

In project management we focus on a specific set of metrics called **K**ey **P**erformance **I**ndicators (**KPIs**).

Definition: Quantifiable measures used to evaluate the achievement of key objectives.

Criteria: To be a KPI of your project, a metric has to be ..

Specific
Tied directly to the organization's strategic goals and objectives.
Measurable (+ consistent measurement)
With clear data behind it
Achievable
Targets realistic and attainable within available resources.
Actionable
Provide insights that can lead to actionable decisions.
Relevant
Impact desired business outcomes and be significant to the organization.
Time-bound
Defined time frame for measurement to track progress over specific interval of time

4.4
Metrics

A good set of KPIs to help you with

> **Decision making**
> **Quick reaction**
> **Strategic orientation**

Two types of KPIs

> **Leading indicators**
> **Lagging indicators**

Two Types of KPIs

Leading indicator	Lagging indicator
Proactive measure	*Reactive* measure
Predict changes/trends	*Reflect* past performance or conditions
Provide early warning	Validate/confirm (or not) leading indicator
To *predict* future performance	To *identify* a *root* cause
Helps to take proactive action	*Evaluate* effectiveness after the fact

A **balanced** mix between **leading** and **lagging** indicators is ideal for a **comprehensive approach** of past and future performance.

It will allow you to address **short-term challenges**, stay aligned with your **long-term objectives** and seek **continuous improvement**.

*Which KPIs for **your** project ?*

4.4

Metrics

Example of a lagging KPI :

Measuring reductions in carbon emissions is a **retrospective evaluation** of the effectiveness of sustainability initiatives implemented in previous tours.

Objective: Guarantee a **sustainable** and eco-friendly **experience** to customers

S.M.A.R.T Objective: Carbon Footprint Reduction (CFR) per participant of 10% each year.

Criteria for your Key Performance Indicator :

S Aligns with sustainability goals and environmental responsibility objectives.

M(+) Measured in carbon emissions (e.g., kg CO_2) associated with tours and activities **+** Ongoing tracking allows for adjustments in practices to meet targets.

A Insights can inform operational changes to reduce emissions further.

A Targets can be based on historical emissions data and sustainability goals.

R Crucial for assessing the environmental impact of operations, a key aspect of ecotourism.

T Measured annually or after specific tour seasons to assess progress toward reduction targets.

4.4

Metrics

Example of a lagging KPI :
Measuring reductions in carbon emissions is a **retrospective evaluation** of the effectiveness of sustainability initiatives implemented in previous tours.

Method
Use an ecological footprint calculator (MEET Network, ETIS, GSTC) that assesses carbon emissions based on transportation, accommodation, food, and activities included in the tour package.

MEET provides an online ecological footprint calculator. Try it here

Calculation
Calculate total emissions per tour and set reduction targets (e.g., aim for a 10% reduction year-over-year).

Frequency
Measure carbon footprint after each tour season or annually.

Data Analysis
Compare emissions data over time to assess progress toward sustainability goals.

4.4
Metrics

Each of your digital touchpoint will gather digital data. It can be valuable for monitoring performance in some areas.

How to **leverage** these data sources effectively ?

Social Networks

Engagement rates Measures interactions (like, share, comments).
Follower Growth Tracks the increase in followers over time (popularity and reach).
Click Through Rate (CTR) % who clicks on links in posts, showing interest.

🔍 Details and other examples

Website (including blogs)

Traffic Sources Understanding where visitors come from
Bounce Rate % leaving after viewing only one page. Landing pages may not be engaging enough.
Time on Page Measures how long visitors stay on specific pages, providing insights into content relevance and engagement.
SEO Performance Metrics Rankings for target keywords and organic traffic levels, crucial for assessing online visibility.

E-commerce

Sales Conversion Rate % making a purchase, indicating the effectiveness of the sales funnel.
Average Order Value (AOV) The average amount spent per transaction, useful for assessing customer spending habits.
Customer Lifetime Value (CLV) Estimates the total revenue a business can expect from a single customer account over time, helping to gauge long-term profitability.

🔍 Details and other examples

05 | Financial Sustainability

5.1

Costs and revenues

The **four criteria of an estimate**

Keep it in mind for your KPIs !

For the well-being of your project and its future development you need to make some profit out of it somehow.

Unsurprisingly, your **revenues** need to exceed your **costs.**

To stay on track you will need a **balanced budget**. Here again, prevision and estimation are central.

Range

Between -25% to +75% ☐ between −5% to +10%

Accuracy

The correctness of an estimate.

Precision
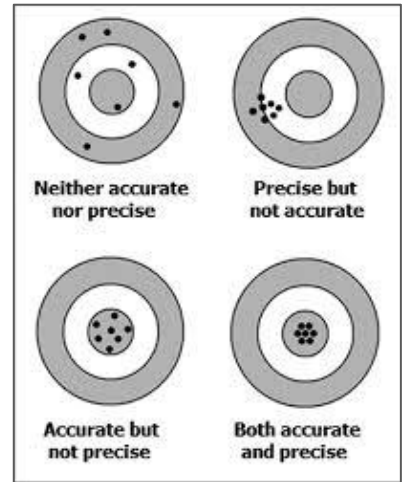
The degree of exactness associated with the estimate.

Confidence

Only increase with experience

Fig. 12 – Accuracy vs. Precision

5.1

Costs and revenues

Composition of a project budget

Work Cost Estimates

Estimation of work effort, duration, costs (fixed/variable), people.

Cost Baseline + Contigency reserve

Aggregation of cost to develop cost baseline and the allocation through the project cycle. The contingency reserve funds to allow for uncertainty and implement a risk response.

Project Budget + Management Reserve

Management reserve are set aside for unexpected activities related to work.

Considering social and economical cost in your budget ? How so ?

Fig. 13 – Budget build-up table [12]
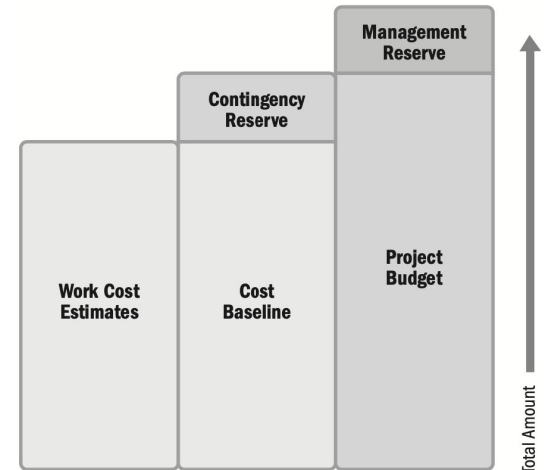
[12] Project Management Institute, *A Guide (…)*, p.63

5.1

Costs and revenues

When developing a **new service or a product**, you need to assess the **financial viability** of your idea. The **break-even point** can help you with that.

The break-even point (BEP) refers to the level of sales at which total revenue equals total costs, resulting in neither profit nor loss. It helps businesses determine the minimum sales volume needed to avoid losses and informs pricing, cost management, and sales strategies.

$$\text{BEP in Units} = \frac{\text{Total Fixed Costs}}{\text{Contribution Margin}}$$

$$\text{BEP in Revenue} = \frac{\text{Total Fixed Costs}}{\text{Contribution Margin Ratio}}$$

Key concepts

Fixed Costs do not change with the level of production or sales. They remain constant regardless of how many services you provide (rent for accommodation, salaries of staff, insurance, marketing expenses).

Variable Costs fluctuate based on the level of services provided. The more activities or tours you conduct, the higher these costs will be (supplies for guided tours, food and beverages for guests, maintenance of facilities, transportation costs).

Selling Price per Unit is the price at which you plan to sell your services or products. This could be the price per night for accommodation or per person for a guided tour.

5.1

Costs and revenues

Calculating the **BEP** : an example

🔍 For an online calculator

🔍 For case studies in real life

Contribution Margin is calculated as the selling price per unit minus the variable cost per unit. It represents how much each unit sold contributes to covering fixed costs after accounting for variable costs.

Contribution Margin   =   Selling Price - Variable Cost

$$\text{Contribution Margin Ratio} = \frac{\text{Contribution Margin}}{\text{Selling Price}}$$

Example

You are planning to offer eco-lodging and guided nature tours as part of your project :

Fixed costs	Variable Costs (per guest)	Selling Price per Unit
Rent for accommodation 10 000€ / year	Supplies (food, toiletries) 20€	Price for lodging per guest/ night 100€
Salaries for staff 15 000€ / year	Guided tour expenses 15€	Price for guided tour per guest 50€
Marketing expenses 5 000€ / year		
Total fixed costs = 30 000€	**Total Variable Costs = 35€**	**Total Selling Price = 150€**

5.1

Costs and revenues

Calculating the **BEP** : an example

In order to **determine the number of guests** (staying one night) you need to cover all the costs associated with your service, you decide to calculate the BEP:

1. Calculate the Contribution Margin & Ratio

    Contribution Margin = 150 - 35 = 115
    $$\text{Contribution Margin Ratio} = \frac{115}{150} = 0.76$$

2. Calculate Break-Even Points in Units

    $$\text{BEP Units} = \frac{30\,000}{115} \approx 261 \text{ guests (staying one night)}$$

3. Calculate the Break-Even Point in Revenue

    $$\text{BEP Revenue} = \frac{30\,000}{0.76} \approx 40\,000€$$

With these numbers, you will need at least 261 guests a year.
In terms of revenue, you will need at least 40k€

5.1

Costs and revenues

Revenue streams, financial planning and adaptation

Revenue Streams

Multiple revenue streams and their diversity (accommodation, guided tours, merchandise sales, etc) can complicate break-even calculation as each stream may have different pricing strategies and contribution margins.

When considering a new revenue stream you should conduct thorough financial planning based on precise and accurate estimation of the revenue, fixed and variable costs associated. Other factors such as seasonal variability can also influence your costs and revenues.

Another question is about partnership with local communities or organizations. They can helps share cost, bring their expertise and enhance value on short-term.

Sensitivity Analysis

Testing different scenario can also help you in decision-making. Use a table or chart to visualize how changes in multiple factors affect the break-even point.
If your BEP is 200, what happens if you increase your fixed costs by 30% ?

⇒ BEP + 43%

And if you increase your price by 30% ? ⇒ BEP - 23%

Factor	-30%	-20%	-10%	Base	+10%	+20%	+30%
Fixed costs	143	154	167	200	222	250	286
Selling price	333	250	222	200	182	167	154
Variable cost	143	167	182	200	222	250	286

5.2

Fundrasing

To raise funds for your grassroots tourism initiative, there are many options available.

Equity

- **Community Shares:** The enterprise could offer shares to community members and supporters, giving them a stake in the business and a say in its development. This is a great way to build local ownership and support.
- **Angel Investors:** Seek out individuals with a passion for sustainable tourism and community development who are willing to invest in the enterprise in exchange for equity.
- **Impact Investors:** Target investors specifically looking to support businesses with a social and environmental mission, aligning with the grassroots nature of the enterprise.

Public Grants

- **Tourism Development Grants:** Many governments offer grants to support tourism development, especially in rural areas or those focusing on sustainable practices.
- **Rural Development Programs:** Explore grants specifically aimed at revitalizing rural communities through initiatives like agritourism or cultural heritage tourism.
- **Environmental Grants:** If the enterprise has a strong environmental focus, grants from environmental agencies or ministries could be a source of funding.

Private Grants

- **Foundations:** Many foundations support community development and sustainable tourism projects. Research foundations that align with the enterprise's mission and apply for grants.
- **Corporate Social Responsibility Programs:** Large companies often have CSR initiatives that fund projects related to community development or environmental sustainability.

5.2

Fundrasing

Take some time to consider which option(s) fits best. You can try knocking at different doors, although we suggest that you make some important considerations:

- **Clear Value Proposition**: clearly articulate the social, environmental, and economic benefits of the grassroots tourism enterprise to attract investors and donors.
- **Strong Business Plan**: develop a comprehensive business plan that outlines the enterprise's goals, strategies, and financial projections.
- **Community Engagement**: actively involve the local community in the fundraising process to foster ownership and support.

Investors

- **Venture Capital:** While less common for grassroots initiatives, if the enterprise has high growth potential and a solid business plan, it could attract venture capital funding.
- **Social Enterprises:** Partner with existing social enterprises or impact investment funds that are aligned with the values of the grassroots tourism enterprise.

Sponsors

- **Local Businesses:** Partner with local businesses to sponsor events, provide in-kind donations (like accommodation or food), or offer discounts to tourists.
- **Tourism Boards:** Collaborate with regional or national tourism boards to gain exposure and potential sponsorship opportunities.
- **Sustainable Tourism Organizations:** Seek sponsorships from organizations dedicated to promoting sustainable and responsible tourism.

Donations

- **Online Fundraising:** Utilize platforms like GoFundMe or Patreon to allow individuals to make donations to support the enterprise.
- **Community Events:** Organize fundraising events like dinners, auctions, or cultural performances to engage the community and encourage donations.
- **Volunteer Programs:** Offer volunteer opportunities in exchange for donations, allowing supporters to actively contribute to the enterprise's success.

Crowdfunding

- **Reward-Based Crowdfunding:** Offer unique rewards to donors, such as exclusive experiences, local crafts, or early access to bookings, in exchange for their contributions.
- **Equity Crowdfunding:** Use platforms that allow individuals to invest small amounts of money in exchange for equity in the enterprise.
- **Debt Crowdfunding:** Secure loans from a large number of individuals through platforms that facilitate peer-to-peer lending.

5.3

Long term costs and benefits

It is important to have a clear idea of your **long terms costs** and **benefits**, also to help you define the **price of your experience** and consider some **discounts**.

More about Cost-Benefit Analysis (CBA):

🔍 General approach

🔍 Discussing elements and sources for further readings

Why ?

Informed Decision-Making

Understanding long-term costs and benefits helps individuals and organizations make informed choices about investments or projects.

Budgeting for the Future

It encourages thinking about how decisions today will impact finances in the future.

Evaluating Alternatives

This process allows for comparing different options to see which offers the best value.

Let's use a simplified example

You want to consider solar panels for your lodges. It costs 10000€ and has maintenance costs of 200€ a year. On another hand, it allows you to save 1200€ on electricity each year. Your lodges also gain value over time with the panels, up to 3000€ after ten years. To understand the total long-term costs, add up all the expenses and benefits over the project's lifespan (in this case, let's say ten years).

Costs : 10 000€ + (200€ . 10) = 12 000€
Benefits : (1200€ . 10) + 3 000€ = 15 000€

⇒ Your investment is financially sound

Net Present Value

We now that money today is worth more than the same amount in the future due to inflation. For a more accurate estimation, future benefits should be adjusted to reflect their present value (using a discount rate).

🔍 If you want to know more about this and how to calculate it

5.4

Final price of the experience

To open up the perspective about this section dedicated to the financial sustainability of your (future) project, let's talk now about the **Triple Bottom-Line framework**. It can be useful once again to estimate the **price of your experience**, this time also taking into account your **local environment**.

🔍 <u>Further reading here</u>

The Triple bottom line (TBL) is an accounting framework that expands the traditional focus on profit to include social and environmental considerations. Coined by John Elkington in 1994, this framework is often summarized by the three P's: **People**, **Planet**, and **Profit**. It provides a more holistic view.

People (Social Impact) dimension measures an organization's social responsibility and its impact on all stakeholders.
Metrics may include: employee satisfaction and retention rates, diversity and inclusion initiatives, community engagement activities, fair labor practices and working conditions, contributions to local charities or social causes

Planet (Environmental Impact) dimension evaluates an organization's ecological footprint and its efforts to minimize harm to the environment.
Metrics may include: carbon emissions and energy consumption, waste management practices, water usage and conservation efforts, sustainable sourcing of materials, biodiversity impacts and conservation initiatives

Profit (Economic Performance) dimension is more broad in TBL framework to include ethical business practices and the economic value created for all stakeholders.
Metrics may include: revenue growth and profitability, economic contributions to local communities, ethical treatment of customers and suppliers, long-term financial sustainability.

5.4

Final price of the experience

To open up the perspective about this section dedicated to the financial sustainability of your (future) project, let's talk now about the **Triple Bottom-Line framework**. It can be useful once again to estimate the **price of your experience**, this time also taking into account your **local environment**.

🔍 <u>Further reading here</u>

To gain a comprehensive understanding of the project's value beyond just financial metrics, let's apply the TBL framework to our previous example.

<u>Profit</u>

Social Analysis (People)
Community Impact
Job creation with local jobs for installers and maintenance workers.
Community awareness about renewable energy and its benefits among neighbors and friends.
Health Benefits by using solar energy. The household contributes to reducing air pollution from fossil fuels, which can lead to better health outcomes for the community. Estimated reduction in respiratory illnesses due to improved air quality could save local healthcare costs.

Environmental Analysis (Planet)
Reduction in Carbon Footprint if solar panels can reduce carbon emissions by approximately 1 ton per year, this amounts to a total reduction of 10 ton after ten years.
Sustainable energy uses like solar reduces reliance on fossil fuels, contributing to long-term sustainability and environmental health.

06 | Prototype Heritage Experience

6.1

Prototyping: why so important?

A prototype is an early version of the final experience, which does not contain all the features it will contain, but just the essential ones. Even if you think you can't **draw**, don't worry! Just try. This encourages you to be creative and to really wear the shoes of the beneficiary.

Remember: everything in this building block is aimed at **realizing this prototype for real**.

- Are you designing a new museum exhibition? You can draw the props that you will use to mock up the stands or other types of physical elements that will be used for the exhibition. A prop is a fake version in much cheaper material, e.g. recycled cardboard box.
- Are you planning a team-building tourism experience involving cultural heritage? Then a roleplay faking the experience could be a useful prototype.
- Are you inventing a new excursion? A shorter and simpler version of it can be a solution to explore the place and see if it works.

Once you have decided, plan your *beta* **test** by deciding where and when to do it, who will be the lucky tester and how you will gather feedback, which you will write down once you get it from both internal (your team) and external stakeholders (the beta testers, the local community, etc.). Remember to have fun!

6.2

Feedback

Gathering feedback is essential for **continuous improvement** and sustainability.

You can do it in **multiple ways** and it is relevant to **think** about the **type** of information you need for each one.

Which **methodology** and which **tool** are more adapted to your needs ?

In-person or online surveys.
Include questions about overall satisfaction, specific activities, and suggestions for improvement

Interviews and Focus Groups
To engage with tourists and gather in-depth insights about their experiences. This qualitative data can reveal nuances that surveys might miss. You can also organize group discussions with selected participants to explore their experiences and perceptions collaboratively.

Social Media Engagement
Monitor comments, messages, and reviews on social media platforms where your project is promoted. Encourage tourists to share their experiences online. Create specific hashtags for your project to facilitate tracking of user-generated content.

Feedback Forms
Provide feedback forms at the end of each activity or tour. Ensure they are easy to fill out and include both quantitative ratings (e.g., Likert scale) and open-ended questions.

Observation
Observe tourist interactions during activities. Take notes on engagement levels, reactions, and any issues that arise, which can provide additional context for feedback.

07 | Impact & monitoring

7.1
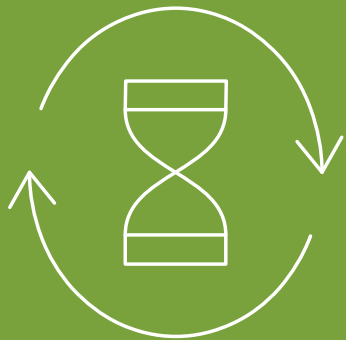
Measuring impact

What ?

Impact is a complex concept. In project management it refers to the **significant effects** that a project has on its intended beneficiaries, stakeholders, and the broader community.

The complexity to assess impact

Impact is the starting and ending point for anyone implementing or funding a project. It is what defines in the broadest terms the actual success of the project.

> What was, is and will be the impact of a project ?
> Did it produced the change it set out to do when it was drafted ?

Social impact can be characterized by the significant and meaningful changes that result from your project activities. It encompasses effects on individuals and communities, often focusing on improving quality of life. It can include efforts in education, employment, community development, etc. For example, what is the impact on

> Local economy (employment opportunities for guides, transportation, artisans, ..)
> Workers (well-being, salary, inclusivity, ..)
> Young people (training, mentoring, opportunities, ..)

Ecological impact concerns the effects that human activities have on the natural environment. It can include changes to ecosystems, fauna and flora, pollution, regeneration of a space, etc.

> Food (local, organic, ..)
> Transportation (public transportation, bike, accessibility, ..)
> Local ecosystem (regeneration, water use, respect of natural/protected areas, ..)

7.1

Measuring impact

How ?

Measuring and assessing impact to check whether your project has achieved its objectives and how it has **influenced** your local communities and the environment.

Different conceptions involve **different methodologies**.

Impact as stories

You could address impact as stories with an inductive approach, by conducting interviews or focus group. This qualitative approach allow you to better understand the influence your project have on people, its successes and weaknesses. Stories can be valuable for dissemination and communication materials too.

Impact as a change in trend

With a deductive and quantitative approach, you can determine if your objectives have been reached by setting a baseline and threshold of success. For example, our CO^2 footprint reduction KPI may be relevant for your ecological impact.

What indicators for the regeneration of an area ?

Qualitative vs. Quantitative   Further explanation

Both qualitative and quantitative indicators are essential for a comprehensive understanding of your impact. Balancing both types offer a holistic view.

Aspects	Qualitative KPIs	Quantitative KPIs
Measurement	Non-numerical (descriptive characteristics)	Numerical (expressed in figures)
Data Type	Based on qualitative data (feedback/surveys)	Based on quantitative data (sales figures, etc.)
Perspective	Subjective view of performance	Objective, data-based view of performance
Examples	Customer satisfaction, employee engagement	Sales revenue, conversion rates

Social impact measurement and analysis tools

7.1

Measuring impact

Critical issues arising during a project may be **unforeseen**, but may also arise from **risks** discovered during the **project planning** phase.

It is important to understand **what** happened and **how** it impact your project in order to react.

To **maximize ecological and social impact** of your project it has to be financially stable, able to reach its objectives in time, respect the deadlines and deliver products or experience at the quality level expected by your customers.

Any event or condition having a **negative impact** on your project can affect in turn your project performances and impact on the local economy or environment. That is why **risks** and **criticalities** **management** are important.

Risk

An **uncertain** event or condition which, if it occurs, **affects** positively (opportunity) or negatively (threat) one or more goals of the project.

Risk management

The process of **identifying** potential risks to the success of the project and the process of implementing **strategies and procedures** that will **mitigate the impact** if such risks occur.

Identify, define, estimate

Several factors can have an influence on your goals (meteorological conditions, delays in construction, change in legislation, ..). Estimate for each the impact (on a scale of 1-10) and the likelihood of each occurring (in %) to rank them by their severity score.

Example : *Opposition from local communities regarding project activities*.

⇒ Severity score = Impact (8) x Probability (0.3) = 2.4

7.1

Measuring impact

Mitigate, reduce and (if possible) eliminate

The project manager must commit to putting in place a response strategy for any potential risk. The action plan will be the one in which your creativity and resourcefulness will come into play. You should also clarify the procedure with your team to ensure appropriate answer.

Example *: Opposition from local communities regarding project activities*

⇒ Conduct a new stakeholder analysis, establish clear communication channels, engage them early and often, build relationships and trust, develop conflict resolution strategies.

Criticality

An event that **has occurred** and affects the project. They can be **unforeseen** or come from **risks** identified beforehand.

Effective criticality management

A criticality cannot be tackled effectively if the potential outocmes are not realized beforehand. To minimize the impact that critical issues have on the project, it is necessary to quickly set up an action plan and solve the problem before it becomes serious.

By reviewing the criticality and how it has been resolved, you can obtain information relevant to future risk management strategies to avoid similar events in future projects

7.2

Disseminating impact

Disseminating and promoting positive impacts of an eco-health project requires a multifaceted approach. Your **strategy** could include :

Early stakeholders engagement: involving local communities, stakeholders, and policymakers from the beginning.

Multiple communication channels: social media campaigns, newsletters and blogs, distribution of flyers and brochures in community centers, schools and local businesses.

Organize local events: workshops and seminars about project's goals and outcome, health benefits from improved ecosystems or environmental practices. You can also organize events to celebrate achievements, such as the completion of a restoration project or improvements in community health metrics.

Leverage partnerships for broader reach: collaborate with NGOs and local organizations to enhance credibility and expand outreach efforts. You can even consider to participate in or co-host events with them to share knowledge and resources.

Create educational programs for schools that teach students about the importance of eco-health principles or training sessions for local leaders on how to promote eco-health practices
within their communities.

 Of course those are just ideas, several strategies can be designed and implemented !

Good luck with the design of your tourism experience!

These modules were kindly prepared by Loic Bierlaire from Materahub.