

Community-Based Tourism Facilitation

Manual



IMPRINT

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Established in 1964, the International Trade Centre (ITC) is the joint agency of the World Trade Organization and the United Nations. ITC is the only international development agency fully dedicated to supporting micro, small and medium-sized enterprises (MSMEs) to enable them to benefit from trade. Working with partners to strengthen MSME competitiveness, we help to build entrepreneurial and employment opportunities, particularly for women, youth and people in vulnerable situations. Our main clients are MSMEs, business support organizations (BSOs) and governments in developing countries and economies in transition.

Partners

The Community Based Tourism Manual is jointly developed by the International Trade Centre's Youth Empowerment Project in The Gambia, funded by the European Union, and the NTF III and NTF IV Inclusive Tourism Projects, funded by the Government of The Netherlands, in partnership with:

- Thailand Community Based Tourism Institute
- European Center for Eco and Agro Tourism (ECEAT)
- The Gambia Tourism Board
- The Institute of Travel and Tourism of The Gambia

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Foreword



Growing up in a popular tourist destination, known for its rich rainforests and mountains, beachfront resorts and of course Bob Marley, I know first-hand, the importance of tourism to job creation and overall national development. However, I am also aware of the harmful socio-cultural and environmental impacts that tourism related activities can have.

Yet, I am optimistic that the rebuilding efforts also provide an opportunity to 'right the wrongs' and build a more sustainable and inclusive tourism industry.

Because tourism can bear many hidden costs with unfavourable economic effects on the host communities, ITC supports community-based tourism (CBT) as a practice that is aligned with the World Tourism Organisation's (UNWTO) new guidelines and approach for the COVID-19 pandemic recovery. These guidelines urge the sector to create participatory governance structures with the private sector, local communities, as well as the international community to engage in open dialogue and solutions that contribute to inclusive, sustainable, and resilient development.

Over the past decade, we have been pioneers in the implementation of CBT. This manual realizes the ambition to compile knowledge and best practices, acquired from ITC's tourism development projects implemented in Myanmar and The Gambia, into a CBT methodology that can serve as an academic and practitioner's resource for tourism product development. We have witnessed extraordinary results and accumulated an immense wealth of knowledge and practical experience from this hands-on approach to sustainable tourism development.

I wish to thank the European Union, and the NTF III and NTF IV Inclusive Tourism Projects, funded by the Government of The Netherlands, in close collaboration with the Netherlands' Centre for the Promotion of Imports from Developing Countries (CBI), for funding these projects and without whom the publication of this CBT manual would not have been possible.

We are thrilled that the manual will continue guiding the product development and training in The Gambia through the cooperation with the Gambia Tourism Board, the Institute of Travel and Tourism of The Gambia (ITTOG) and the youth community leaders and practitioners of CBT.

At the same time, we make this manual available as a methodology for global public use, echoing our pledge to embed knowledge-sharing and the provision of technical resources in the footprint of our projects. I hope the manual will contribute to sustainable tourism development, led by destination management organizations, tourism educators and trainers, community leaders, tour operators and other key stakeholders.

ITC looks forward to the continued partnership with governments, the business community and civil society to promote the kind of tourism that delivers on the Sustainable Development Goals (SDGs) and boosts the well-being of local destinations, communities, and tourism actors.



Pamela Coke-Hamilton
Executive Director, International Trade Centre

Acknowledgements

This manual realises the ambition to compile knowledge and best practices acquired from tourism development projects implemented in Asia and Africa into a community-based tourism (CBT) methodology that can serve as resource for tourism product development in an academic setting and by practitioners.

The International Trade Centre (ITC) gives sincere thanks to the funders that have provided precious support to pilot the innovative approaches shared in this manual, namely through the Youth Empowerment Project in The Gambia, funded by the European Union, and the NTF III and NTF IV Inclusive Tourism Projects, funded by the Government of The Netherlands, in close collaboration with the Netherlands' Centre for the Promotion of Imports from Developing Countries (CBI). To bring these lessons together, committed local experts worked alongside regional and international experts as colleagues and friends towards a shared passion and vision.

From the NTF team in Myanmar, special thanks go to Jeanette Scherpenzeel, Program Manager, CBI, Netherlands Enterprise Agency and national staff and tourism experts: Winnie, Pascal Khoo Thwe, Christine, Su Thinzar Soe, Yee Htet and Thu Aung Khaing. Special mention also to tourism partners in the field, especially in Kayah State and Tanintharyi Region, for their continuous support to the project, to the CBT leaders in the villages and to young and motivated local trainers. Without them the project and this manual would not have been possible to realize.

From the YEP team in The Gambia, special thanks go to the Janjanbureh community leaders and youth representatives that supported the implementation of CBT in their region: Omar Jammeh, Isatou Foon, Jalamang Danso, Mohammed Kebbeh and Muhammed Jawneh. Appreciation goes to the Government and national partners in The Gambia who champion the implementation of CBT: the Ministry of Tourism and Culture, the Gambia Tourism Board, the National Centre for Arts and Culture, the Institute of Travel and Tourism of the Gambia and the Gambia Tourism and Hospitality Institute. The contributions of Lamin Bojang, Demba Baldeh and Fatoumatta Camara as CBT facilitators deserve a special mention.

Many ITC staff put energy into the implementation of CBT under these projects: Anders Aeroe, Giulia Macola, Fatou Mbenga Jallow, Raimund Moser, Ngoneh Panneh, Olivier Marty, Amelia Diaz and Marie Claude Frauenrath.

The training content was synthesised and written by Peter Richards, Potjana Suansri and Marlon Van Hee. The team owes a great debt of gratitude to Thailand Community Based Tourism Institute (CBT) and the European Center for Eco and Agro Tourism (ECEAT) which pioneered ongoing evolutions of these working processes for over twenty years.

Lisa Gordon-Davis compiled and re-packaged the content into the final set of resources and tools.

Warm thanks go to Frederic Thomas who worked on both NTF and YEP projects and drove the potential for synergies into action.

The work contained within these pages is born from a labour of love, spanning over 20 years of learning-by-doing on how to increase community participation and benefits in tourism. It is dedicated with love to peace, prosperity and collegueship. Enjoy these lessons.



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Acronyms

To be updated at the end

B2B	Business to Business
CBI	Centre for the Promotion of Imports from developing countries, Ministry of Foreign Affairs of the Netherlands
CBO	Community Based Organisations
CBT	Community Based Tourism
CBT-I	Thailand Community Based Tourism Institute
CSO	Civil Society Organisations
DMC	Destination Management Companies
FAM Trip	Familiarisation Trip
FOC	Free of Charge
ICRT	International Centre for Responsible Tourism
ITC	International Trade Centre
ITO	International Tour Operator
JV	Joint Venture
LCG	Local Community Guide
LGH	Local Ground Handler
LTG	Local Tour Guide
MOT	Ministry of Tourism
NGO	Non-Government Organisation
NTF	Netherlands Trust Fund
TO	Tour Operator
YEP	Youth Empowerment Project







Introduction to this CBT Facilitation Manual



Do you want to learn
how to develop and
market successful,
community-based
tourism?

The community-based tourism (CBT) process can create great products and experiences for tour operators and tourists; while creating significant benefits for local communities and the environment. Without good preparation, CBT initiatives can under-achieve, waste resources, and cause negative impacts. Success requires expertise in tourism and community development: through carefully selecting a destination, trust building, community capacity building, product development and marketing. ITC's internationally recognised and award-winning business to business (B2B) CBT development process is organised in 5 major steps:



1

CONSIDER:

focuses on how to select a CBT destination, build trust, and assess potentials.



2

CONCEIVE:

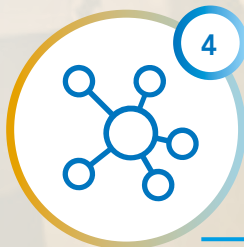
focuses on how to shortlist and design marketable CBT experiences and programmes.



3

CRAFT:

focuses on how to build local capacity to welcome tourists and offer tourism services.



4

CONNECT:

focuses on how to build trusting marketing partnerships and business linkages.



5

CONSERVE:

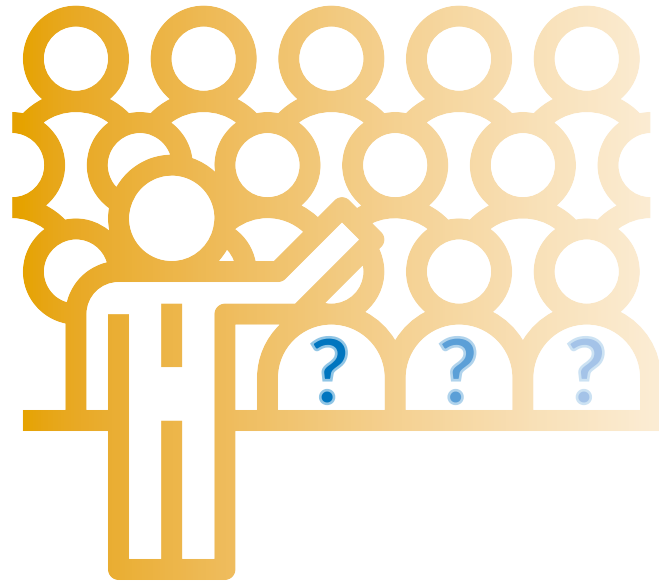
focuses on how to sustain and build on this work, for example after a donor funded project finishes.



CIV : Creative Industry Village **ไผ่** **นร:นครอุตสาหกรรม**



Who
is this manual for?



This **Community Based Tourism Facilitation Manual** will be useful for anyone who wants to learn how to facilitate the creation of fun, safe, inspiring, cultural tourism experiences; which benefit local people in and around tourism destinations. This guide is specifically aimed at tourism and community development professionals, who are responsible for developing and marketing Community Based Tourism (CBT) programmes, or similar responsible, local tours.

There are **four** key target groups:

The following **people** could attend this course:

- 1 Tourism Facilitators and trainers** such as Government, NGO, Academic, CSO and CBO staff, who are responsible for developing and marketing community based tourism.
- 2 Tour operators' Product, Operations, Sales and Marketing Staff** who are seeking new skills and tools to develop and market inspiring, fun, safe, responsible local tours.
- 3 Tourism educators in colleges and universities** who want to teach their students about local community participation in tourism, and how to develop successful CBT.
- 4 Community leaders** who wish to gain new skills and techniques to mobilize, develop, market, manage and operate CBT in their communities, and work with partners.



This manual is one element of a suite of materials that have been designed to develop the skills of CBT Facilitators. It provides the foundational body of knowledge for CBT practitioners, facilitators and trainers; and for academics who will teach the CBT materials to students.

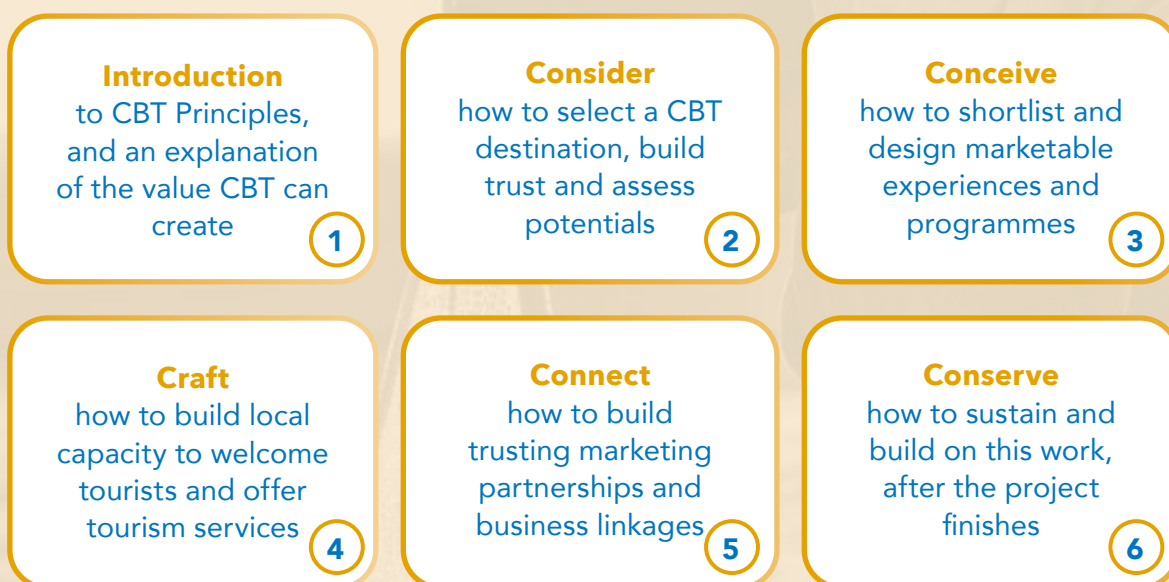
The full set of materials is as follows:

CBT Manual	PowerPoint Presentations	Trainer Guide
<ul style="list-style-type: none"> • This is the core body of content that is the 'textbook' and may be used by both trainers, facilitators and students to learn the theory and process. • This is also a manual for CBT practitioners to follow to implement CBT in the field. • Includes a range of practical tools and strategies for implementation. 	<ul style="list-style-type: none"> • The presentations make the content of the CBT Manual visual so that it can be presented in a training format. • The PPT includes slides with activities, videos, illustrative photos. • The PPT was tailored for use in The Gambia, Africa. However the PPT is designed to be easily adapted to other destinations as needed. 	<ul style="list-style-type: none"> • This document provides the instructions on how to deliver the CBT training and is referenced to the PPT slides. • It provides a programme, list of resources, suggested timings and other relevant information. • Includes supplementary resources e.g. videos, case studies, flashcards.



How is the manual designed?

This manual shares steps and tools for developing a CBT project, building local capacity, and facilitating partnerships so that CBT programmes can reach markets. Following the design of the CBT Facilitator TOT course, the guide is divided into **six sections**:



Each section is divided into four subsections describing specific actions taken during the CBT facilitation process. Each sub-section is organised under up to four further headings:

- 1 What's the issue:** A brief explanation of why this step is important
- 2 In the field:** tools and processes which our team used during the project
- 3 Be prepared:** insights into potential challenges or obstacles
- 4 Tools:** templates, methods, agendas, etc that can be used by CBT Facilitators when developing CBT.

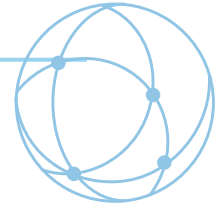
A note on overall course design

The Community Based Tourism Facilitator course has been designed to 'drip' content. This means that some elements of content are introduced early in the course, in a simple format. Later in the course, these same elements are re-visited in more detail. For this reason, please expect some repetition in the course materials, as key issues are presented and then revisited.

An overview of the flow and contents of the guide

Developing successful CBT relies on two key professional skill sets: **tourism and community development**. This manual presents a roadmap of processes and tools which integrate these two pillars. However, working with people is not only a technical exercise. Therefore, the manual is designed to illustrate that successful CBT also requires empathy and social skills.

The manual presents the following process flow:



Initiation: Key steps to initiate a CBT programme:

1. Prepare yourself and your team
2. Survey and identify a suitable destination
3. Build trust with the community
4. Raise community awareness and understanding
5. Organise a study tour



Q: Does the community want to continue?

If yes, then proceed to:

6. Conduct a community study
7. Brainstorm and survey potential activities
8. Shortlist high-potential, marketable products
9. Facilitate a Community Agreement
10. Facilitate a CBT vision and objectives



Q: Firm commitment to move forward?

If yes, then proceed to:

11. Design an attractive CBT programme
12. Build capacity and systems to manage CBT
13. Train local community guides
14. Train local hospitality providers
15. Develop activities and souvenirs
16. Calculate and agree on prices
17. Engage and support local ground handlers
18. Train licensed tour guides
19. Promote CBT to DMC's with a 'whole destination approach'
20. Engage and support national level DMC's



Foundations of sustainability:

ensure that the supply and demand continue to function and create sustainability for the CBT initiative:

21. Build a team of local volunteers
22. Promotion in the closest hub destinations
23. Backstop CBT Coordinators
24. Collect data, monitor and communicate results
25. Work effectively with government and CSO's




Your mission as a 'CBT Facilitator': from pilot destinations to field learning centres

The deep value of a successful CBT initiative lies in its potential for replication and for motivating positive change at national and international levels.

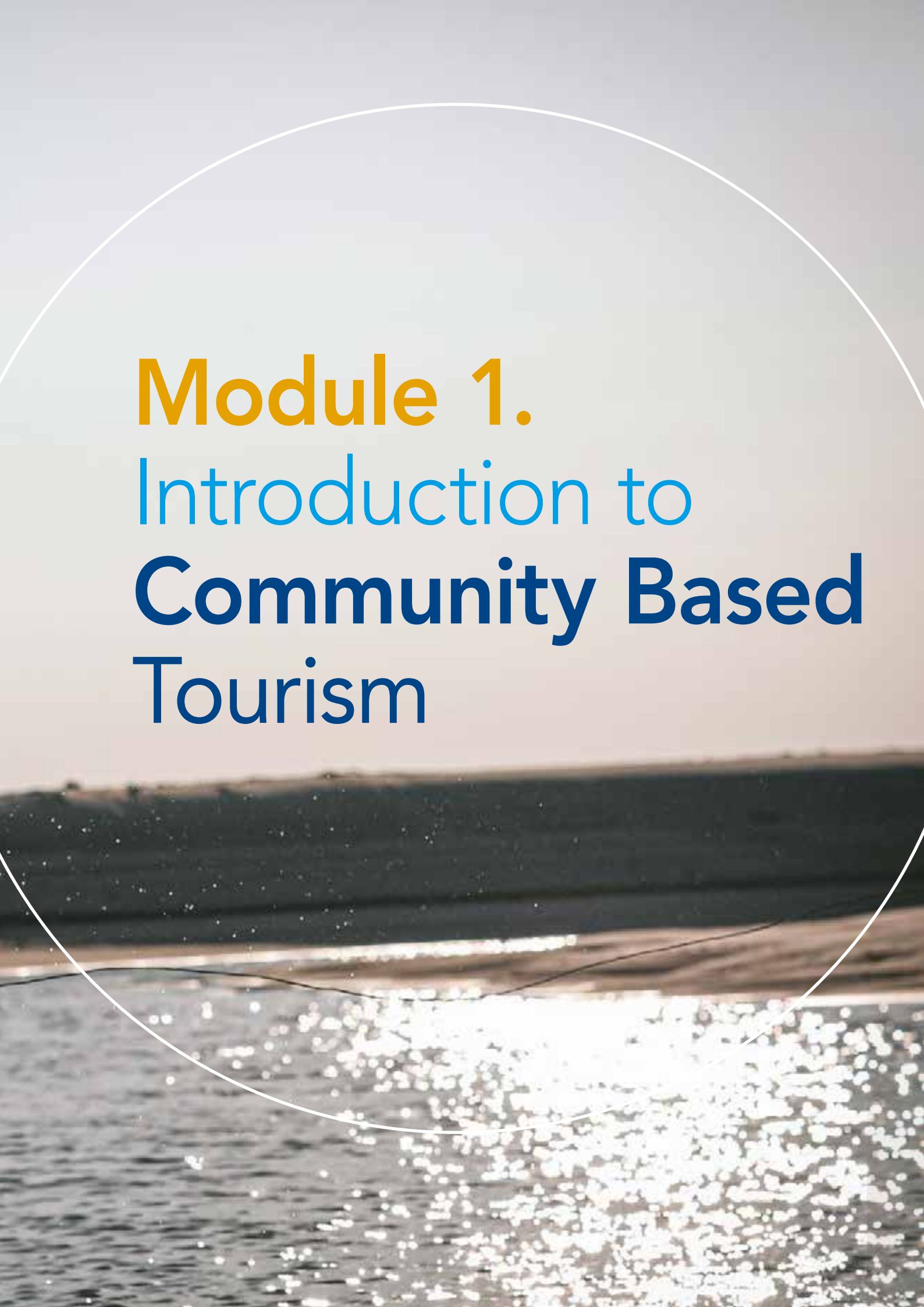
Experience shows that investments in community-based tourism projects are optimised when these local destinations become recognised, productive field learning centres.

When concrete examples of best practice exist, CBT development processes can be replicated by local teams, on local salaries, without large development funds. Our job as CBT Facilitators is to use the tools in this manual to bring these best practice examples to life in our countries.









Module 1.

Introduction to Community Based Tourism



Topic 1: Introduction to CBT

Community based tourism (CBT) programs are based on special aspects of local life that community members feel proud and comfortable to share with visitors; and that tour operators (or other business partners) feel confident to offer their clients. Local people are trained to develop these potentials into enjoyable, well organised services and experiences.

At the heart of successful CBT are welcoming, safe, enjoyable, cross-cultural experiences. This means that creating successful CBT requires understanding what tourists are looking for in a local experience, and exploring and building on what local people feel confident to offer.

Developing CBT requires rigorous, step-by-step training for community members and partners. CBT is not a quick process. It begins with building community members' awareness of tourists and tourism; followed by systematic training to build local peoples' skills to welcome visitors and offer tourism services. This could include training in food hygiene and menu development, serving as a tour guide, taking bookings, keeping records and accounts.

With sufficient training, coaching, and on-the-job experience, local community members can manage tourism in their own villages – even in remote areas. However, community members will need to be able to communicate with the outside world, and can greatly benefit from working with outside business partners to help promote and sell their CBT products.

Training also needs to be delivered to business partners, such as licensed tour guides, and the sales teams of partner tour operators, to understand CBT and play their roles effectively.



THE CBT OPPORTUNITY: DEMAND FOR UNIQUE, AUTHENTIC, LOCAL EXPERIENCES

During the past two decades, what tourists hope to experience while on holiday has changed and expanded immensely. **More and more travellers are looking for a local experience.**

In addition to great local experiences, tourists are also more interested in the impacts of their travels and would like to support tourism which benefits local people and the environment.

CBT activities can be designed for all ages and a wide variety of interests, from mainstream travellers seeking a local experience, to niche markets. Some of these niche markets, such as senior travellers, students or families with children, requires special care to manage risks. However, many local communities offering CBT have had positive experiences welcoming these kinds of travellers. Senior travellers are often highly interested in the nuances of local culture. Parents are often excited to give their children a rich learning experience outside of the classroom. Both groups tend to have a higher disposable income than backpackers or younger travellers. Communities feel proud to welcome students to learn about local life.

Of course, many travellers still enjoy sightseeing and time alone to explore. However, the trend in demand for local experiences creates significant opportunities for local communities to develop new skills and earn money from tourists who are interested in experiencing local life. This market opportunity makes CBT a feasible choice for local community development.

There are lots of options to market CBT and reach visitors. Communities have been successful using social media and other channels to sell CBT tours directly, especially to domestic travellers. However, working with specialist tour operators, guides, and hotels can significantly expand market access for CBT, and thus give increased benefit to local communities. This manual focuses on these 'business to business' (B2B) partnerships.

HOW CBT DIFFERS FROM 'REGULAR' VILLAGE SIGHTSEEING

Not all tourist activity or service in a rural village is CBT. Simply visiting a village does not mean that local people will participate in or benefit from tourism.

So, before we start exploring CBT, let us first think about normal sightseeing in a village. In such a situation, villagers are usually going about their normal lives, without any special preparation for tourism. Tourists usually arrive alone or accompanied by a tour guide.

COMPARING CBT TO VILLAGE SIGHTSEEING

Tool 1: Reflection on CBT vs Normal Village Sightseeing

Reflection: How CBT differs from regular village sightseeing

Think about a similar, local tourism experience which you may have had. Consider:

- What kinds of activities did you have a chance to do in the village?
- Did you get the chance to **learn** anything about local life in the village?
- How did you **feel**? What did you enjoy? Was anything disappointing?
- Did you have a chance to **share** any special experiences with local people?
- How do you think that local people **benefited** directly from your visit?
- What **roles** were local people playing in managing and operating tourism?
- What could have made your **experience** more interesting or enjoyable?



How do your responses compare to the elements of CBT, shared below?

Very simply, compared to regular village sightseeing visits, CBT aims for the following:

- 1 Do:** give visitors opportunities to enjoy inspiring hands-on experiences.
- 2 Learn:** allow visitors to learn about local life, directly from local people.
- 3 Feel:** nurture authentic human encounters, including a warm welcome, curiosity, appreciation, and sense of connection.
- 4 Share:** have sufficient time to interact with and get to know local people.
- 5 Benefit:** ensure that local people can participate in and benefit from tourism.
- 6 Management:** build local peoples' capacity to manage CBT in their communities.

Now that we have introduced CBT, let us look at what it consists of in more detail.

CBT CONCEPTS AND PRINCIPLES



Around the world, during the past two decades, hundreds of CBT programmes have been developed by local communities, with support from governments, tour operators, and non-governmental organisations (NGOs).

Successful CBT can inspire tourists, nurture cross-cultural understanding, create skills, jobs, and income for community members, and help to fund grassroots social and environmental initiatives.

On a CBT tour, you could trek into the forest with an expert woodsman, learn to cook grandma's favourite recipe or spend the night in a village lodge. CBT is managed and operated by community members, working together in a CBT club or group. Sometimes, these services and experiences are developed in partnership with a tour operator or NGO. Local village tour guides, who live in the communities, lead the tours and provide gentle advice on important "do's and don'ts."



A percentage of the income derived from CBT is donated to a [Community Fund](#), which is used to support local community development work or nature conservation. Examples of this can include scholarships for local students, welfare for village elders, maintenance of local or sacred sites, etc. Working as a team makes it easier for local people to tackle challenges which affect the whole community, such as the sustainable management of shared, natural, and cultural resources, waste management, etc.

CBT Definitions

Community Based Tourism is a type of tourism where local communities invite tourists into their communities, giving them insight into their culture and daily lives. It is a form of sustainable tourism that allows travellers to connect closely to the local community they visit.

CBT is:

“tourism that takes environmental, social, and cultural sustainability into account. It is managed and owned by the community, for the community, with the purpose of enabling visitors to increase their awareness and learn about the community and local ways of life”.

(REST, 1997).

“tourism owned and managed by community and intended to deliver wider community benefits”

(Goodwin and Santilli, 2009)





Key Principles

Three key principles which can help us to identify genuine CBT are:

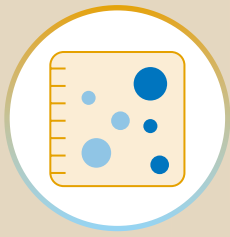
- Step-by-step **capacity building** to prepare community members to welcome guests, manage and deliver tourism services and activities.
- Systematic efforts to **share opportunities** for work and income, including indirectly through a community fund or similar mechanism.
- **Cross-cultural exchange** based on aspects of local life which community members feel proud and comfortable to share with visitors.

CBT Options

A variety of different types of products, services and experiences can be developed through a CBT process. For example:

- **'Classic CBT'**: overnight village stays in simple homestays / lodges, with exploration of local life, led by local community tour guides from the villages.
- **Comfortable accommodations or activities** developed through joint investments. Community members play key roles in management and operations.
- **Short visits** to support a local craft cooperative, eat a meal at a local home, etc.

When promoting these experiences, it is not necessary or recommended to mention 'CBT.' It is better to focus on promoting the guest experiences, and showing how experiences benefit local people and the environment. 'CBT' is a more useful term when promoting to tour operators. CBT adds value as 'the process behind the product,' which helps to ensure a **'great local experience with real local benefits'**, rather than as a specific type of tourism product.



The ways CBT can function

This manual focuses on developing CBT in rural villages. It is also possible to develop CBT in urban communities. However, that is not the focus of this manual. There is a range of different choices for developing tourism in a village. CBT is not the only way to create financial or other kinds of benefits through tourism. There are different models of CBT, and different ways that CBT can function in a village or rural area. For example:

- **CBT as a loose cooperative approach:** villagers with an active interest in tourism are invited to work together in a CBT group or club. Within this club, people will have different roles and responsibilities, for which they will be paid an agreed fee. Participation is voluntary. If CBT becomes commercially successful and scales up, more community members can participate.

This model has the advantage that community members retain maximum decision-making power and control over local resources. However, they will need to work professionally and effectively to be able to manage tourism and work with outside marketing partners. If they cannot gain the confidence of marketing partners, they will find it difficult to sell their CBT.

- **Joint Venture (JV) project:** Community members can also work as partners with an ethical, outside investor to develop CBT as a joint venture. There are many different models of joint ventures with communities, and different perspectives on what actions should be taken for a JV to be considered CBT. Key issues include community consultation and prior-informed consent, land ownership, share-holding, local community influence over the direction of tourism development, roles of local community members in management and salaries.

This model has the advantage that business partners may be able to guarantee market access and provide ongoing training and secure employment to community members. However, it requires high commitment and trust by community members and business partners. If either partner becomes dissatisfied, it is much more complicated to step back from a JV partnership.



Involving the Community

Usually, some local families will be interested in CBT, while others will prefer to remain focused on their existing livelihoods. Based on local potentials, market demand and individual skills and interests, community members can be trained to offer different kinds of tourism services. This commonly includes providing food or transport, leading tours as a community guide, offering accommodation (usually in a homestay or a community lodge), or taking on a management position as CBT coordinator, accountant, or treasurer.

Active community members receive payment as 'CBT service providers.' They also pay a modest contribution to a

Community Fund, which is like a micro-tax, which can be used to support community work and important institutions. In this way, even though the entire community does not participate directly in CBT, everyone does receive indirect benefits.

Why choose to implement a time-consuming CBT process?

The classic, cooperative model of CBT is a particularly useful tool in destinations where local people have little prior experience in tourism and are still living fairly traditional lives. Under these circumstances, local people benefit from working as a team to build knowledge, skills, networks, experience, and

confidence. Working together, community members have greater bargaining power to negotiate with business partners and other outside stakeholders; and are able to maintain greater influence over the direction of local tourism development.

Is 'tourism in the community' an alternative to CBT?

From a community development perspective, it is also possible to create benefits for local community members without instituting a cooperative mechanism. For example, in the case of investment by an outside businessperson, through building a boutique hotel which employs local people as labour; or through training independent local entrepreneurs to offer products to tourists. These can be attractive options. They can provide useful employment and income to local people and can be relatively easily funded through private investment or micro-loans, without the challenges of managing more complex, cooperative CBT structures.

Compared to CBT, these approaches also have potential disadvantages to consider, especially in traditional agricultural communities. If these approaches lead to limited

opportunities for participation and work among the broader community, tourism income may end up in the hands of a small number of people. This can lead to jealousy and even conflict in some cases.

Cooperative structures can help communities to access various kinds of public support. Without a clear cooperative structure, the community may lose opportunities for government investments to upgrade local infrastructure, such as roads and electricity, or opportunities for training or sponsored promotion. Most seriously, tourism may begin to impact natural and cultural resources upon which the whole community relies, without having a social space for community members to meet, monitor, discuss, address and solve these challenges.

MANAGING THE DEVELOPMENT OF CBT

As CBT develops, local people become more experienced, skilled and confident. Tensions can emerge between cooperative structures and individual ambitions. Often, more talented or ambitious community members may start to see opportunities and develop their own side businesses. This can become a cause of resentment, which needs to be addressed.

Tensions between cooperative and entrepreneurial initiatives can be managed by ensuring that the CBT activities continue to evolve with the community, for example through association structures. Local businesses can become more individual, while owners can still cooperate to create benefits and reduce negative impacts on the broader community. In this sense, CBT can play a 'nurturing' role during the first years of developing an area's

experience in tourism, after which CBT may or may not evolve depending on local contexts.

CBT is designed to benefit the whole community. However, local people are free to participate in CBT often, occasionally, or not at all. Indeed, it is rare for all families in a community to participate directly as CBT service providers. Local people have different interests and priorities. They may prefer to prioritise existing livelihoods, or need to care for young children or elderly relatives. They may simply not be interested in tourism. To ensure that CBT does create benefits beyond service providers, a percentage of the income raised from CBT is contributed to a community fund. This money is used to fund local initiatives which benefit all families in the community (e.g., local school, health clinic, temple, etc.).



CBT AND RESPONSIBLE TOURISM

Responsible Tourism is about “making better places for people to live in and better places for people to visit” (ICRT¹). The elements of Responsible Tourism should be integrated into all aspects of CBT facilitation and development. The CBT Facilitator must have thorough knowledge of Responsible Tourism in order to ensure that these elements are a ‘golden thread’ throughout CBT.

Here is a short reminder of how Responsible Tourism principles can be applied in CBT:

People	Planet	Profit
<ul style="list-style-type: none">• Engage respectfully with all members in a community• Listen carefully• Celebrate and showcase local culture• Respect sensitive or taboo cultural elements	<ul style="list-style-type: none">• Develop green products• Celebrate natural heritage• Protect the environment• Respect eco-sensitive areas• Minimise waste• Reduce unnecessary water or energy use	<ul style="list-style-type: none">• Include community members fairly• Share economic benefits with the community• Establish fair and reasonable pricing• Careful financial management

1.– International Centre for Responsible Tourism



Topic 2: The Value CBT Brings to a Community



The 'promise' of CBT is successfully realising great local experiences with real local benefits.



Trainers work alongside community members to craft **fun, safe, inspiring tourism experiences built on special aspects of local life** which local people feel proud and comfortable to share with visitors, and tourists (and tourism businesses) really want to buy.

THE VARIOUS **ROLES** OF THE INDIVIDUALS INVOLVED IN CBT

A number of people have to work together to deliver on this CBT promise. These include people within the community and beyond. Actors working inside the villages include:

- **Cooking group members** take turns cooking authentic local food for visitors to taste. Ingredients are usually grown locally. To prepare to welcome visitors, the cooking group is trained in food hygiene, menu development and storytelling about their dishes.
- **Village artisans** are often older community members who continue to practice and conserve a special skill, such as weaving, carving, dance or musical performance. Artisans often welcome visitors in their homes for cultural exchange and offering souvenirs.
- **Local community guides** are villagers, who lead visitors to explore their community, sharing history, culture, and the relationships between local people and their environment, and introducing visitors to the village artisans and other villagers.
- **Licensed tour guides** do not usually come from the community. Their foreign language skills help tourists to understand the local community guides' explanations and allow visitors and host community members to enjoy a two-way conversation.
- **The CBT Coordinator's** role includes taking bookings, informing community service providers (e.g., local guides and cooking group members) about bookings, taking payments, and providing receipts. The CBT Coordinator will usually welcome important visitors to the community. CBT Coordinators are a crucial role for successful CBT.

Together, this team offers CBT products which can be sold to the market, but how to do this?

SELLING CBT TOURS

Selling CBT tours requires close cooperation among actors in the tourism supply chain. In this section, we will meet various stakeholders who may work together to get CBT to the market.

THE VALUE CHAIN APPROACH

ITC tourism teams have adopted and refined a successful [value chain approach](#) to selling CBT. At the [macro-level](#), this approach involves strengthening tourism industry associations, working alongside community members and tourism SMEs to develop new products and services, helping to brand destinations, and establishing market linkages. At the local, [micro level](#), ITC focuses on training tourism service providers (including local communities, local tour guides, ground-handlers, hotels

and restaurants) to increase the quality of services sold through tour operators and directly to individual tourists (FIT).



Key actors along the international CBT Tourism Value Chain

Local communities	These are the communities that offer cultural tourism experiences.
Local community tour guides	These are local villagers who were trained to lead CBT tours in their home villages. They often cannot speak tourists' languages (e.g., English) fluently.
Licensed, professional tour guides	These guides are usually trained and licensed by the Ministry of Tourism of the country. They are employed by DMCs or ground handlers (see below) to lead tours. They are expected to be able to speak tourists' languages well.
Local Ground Handlers (LGH)	These are usually small businesses which operate tours at a provincial or state level. On the one hand, they work directly with local communities; sending tourists to participate in their CBT programmes. On the other hand, they work in partnership with DMCs to operate their tours on the ground.
Destination Management Companies (DMCs)	These are national level tour operators based in major cities. DMCs develop and offer tour itineraries which cover the entire country to international, outbound tour operators in source markets such as Europe.
International, outbound tour operators (ITO)	These are businesses based in source market countries. They develop tours in partnership with DMCs and sell them to international tourists.
Other organisations	These can play key supporting roles <i>outside the supply chain</i> . These include government ministries and tourism boards, Tourism Associations (TAs), local and international NGOs, academic organisations, and community-based organisations.

→ This list shows that **successful CBT initiatives are not developed in isolation**. ITC's CBT approach focuses on building trusting business partnerships along B2B supply chains. The organisation works at each point of the chain from communities to international markets.

New CBT products and experiences need to be built upon rigorous community consultation, participation, and capacity building; and can benefit greatly from integration into the broader trade context of B2B tourism supply chain and "whole destination" approaches. This ensures awareness, excitement and buy-in from local community members and tour operators.



MARKETING CHANNELS

There are many potential markets and marketing channels for CBT. This manual focuses on marketing CBT through business-to-business (B2B) links. However, this approach will not work for every destination. Depending on the local context, other, alternative marketing channels and approaches may be more suitable to get CBT to market. Key choices include:

- **B2B:** marketing through tour operators is one good strategy for well-located destinations, which have the potential to attract significant numbers of international tourists.
- **FIT:** some destinations may be more successful by focusing on independent travellers (FIT), domestic or regional markets. Social media provides useful tools for achieving this.
- **Other:** developing partnerships outside traditional tourism supply chains; through channels such as educational trips and special interest groups e.g., birdwatching clubs.

CONTRIBUTIONS OF CBT: 'GREEN AND GOOD?'

The positive and negative impacts of tourism should consider from the start, to design products and experiences, which balance commercial success with sustainable development.

CBT can make diverse contributions to communities and the environment. These include:

Socio-cultural contributions

CBT can be a powerful adult education process, which can empower local community members in different ways.

- Influence and benefit from tourism development in their communities.
- Share roles and responsibilities between diverse community members, giving men and women, elders and youth, formal and informal leaders new opportunities to learn, work, and solve problems as a team.
- Develop diverse, transferable skills, such as accounting, management, presentation, food hygiene, etc. leading to higher quality of life.
- Meet, understand and cooperate with diverse outside stakeholders and networks.
- Gain new government support, for example access new roads, electricity, phone-networks, etc
- Provide a new social space for local community members to define and tell their stories, in their voices, to the world
- Inform tourists about important rules and taboos, Do's and Don'ts.
- Celebrate local culture and catalyse interest among the new generation.
- Choose which aspects of local life and culture local people wish to preserve and what they wish to change.

The Economic Contribution of CBT



CBT can create economic benefits at several, different levels. At community level, income is earned directly by service providers and funds local development through the community fund. In tourism value chains, CBT can stimulate the sales of diverse tourism services.





+ Community level:

Economic contributions that CBT can make at community level include:

- New jobs and income for diverse local people, including youth, women and village elders.
- Direct economic benefits e.g. from buying meals, handicrafts/artisans and guides.
- Indirect and multiplier economic benefits: e.g. sourcing local ingredients, using local shops, community fund for development.

+ Destination and national level

Economic contributions that CBT can make at destination and national level include:

- Contribution to the overall national tourism product offering;
- Generating B2B linkages thus creating additional business and economic contributions all along the tourism value chain: at local, regional and national levels;
- Adds value to national marketing e.g. promotions of CBT products contributes to overall national destination awareness, and
- MSME capacity development.

The Environmental Contribution of CBT

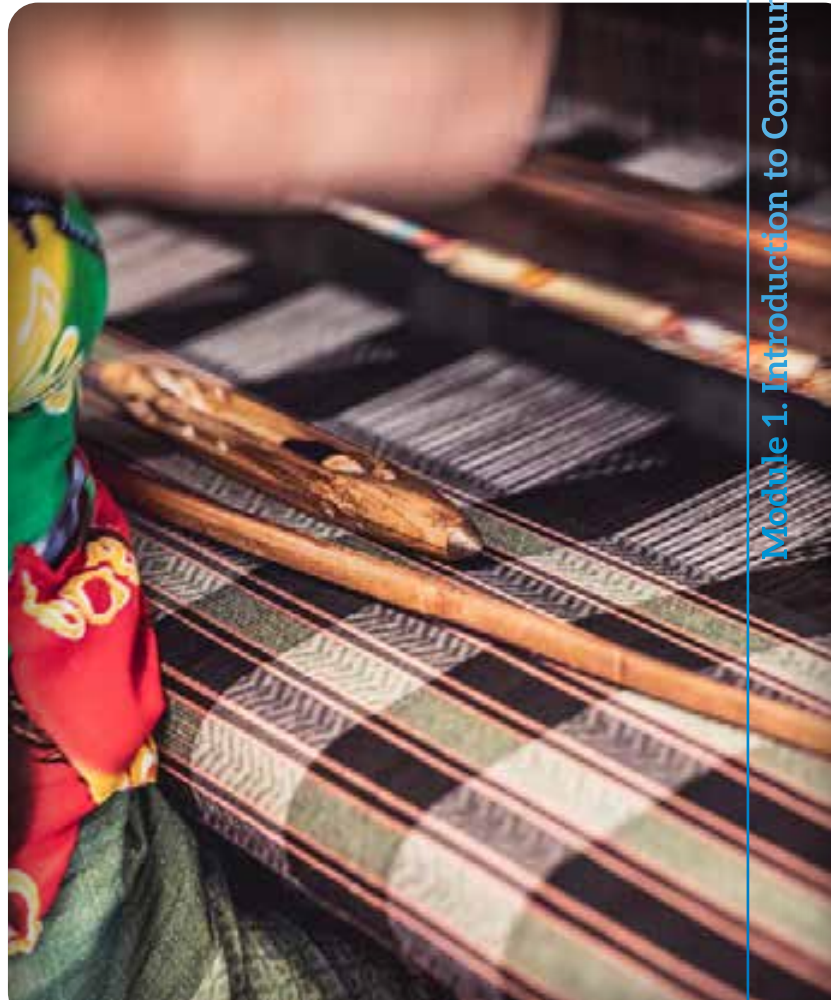
CBT should be intentionally designed to create benefits and reduce negative impacts on the environment from the start. This can then:

- enable visitors to experience, understand and appreciate the relationships between local community members and the natural world, including existing, successful conservation and natural resource management practices;
- increase environmental awareness and stimulate environmental action among local communities, tourists and private and public sector partners;
- reduce local communities' reliance on using local, natural resources, by opening new income streams;
- stimulate improved waste management, and water and energy efficiency;
- create funds for wildlife / nature conservation and natural resource management;
- embed nature conservation into CBT products and experiences (e.g. bio-degradable packaging for picnics, tree planting as a CBT activity, etc.);
- initiate projects which can continue to be supported after tourists return home, and
- catalyse understanding and partnerships, and thereby reduce potential conflict between local communities and nearby Protected Area organisations.

These benefits need to be carefully weighed against negative impacts – e.g. community members' access to land and water, the burden of increased waste from tourism, etc.

BENEFITS AND CHALLENGES OF CBT: STAKEHOLDER PERSPECTIVES

Every community has different strengths and challenges. Each CBT is different. Nevertheless, there are some common opportunities and challenges to be aware of, before deciding to embark on developing CBT.



Below are stakeholders' perspectives, with common examples of what each stakeholder often considers to be the key benefits and challenges of CBT:

	Benefits	Challenges
Community member	<ul style="list-style-type: none"> • Income • New skills • Celebrating culture • Support from the government to develop new infrastructure 	<ul style="list-style-type: none"> • Can take a long time before tours are sold and visitors arrive • Managing money • Managing jealousy • Waste/litter
Licensed tour guide	<ul style="list-style-type: none"> • Warmer welcome • Improved food hygiene through CBT training • Tourists enjoy meeting local people and hands-on experiences 	<ul style="list-style-type: none"> • Can be challenging to work as a team with the local community guides • Need to book in advance, which is not always convenient
Tour operator	<ul style="list-style-type: none"> • Glad to have new products to sell • Meets tourists' demand for local experiences • International tourism partners are confident that CBT is responsible 	<ul style="list-style-type: none"> • More expensive than normal sightseeing • Can be difficult to contact the CBTs in advance • Managing the volume of visitors during the high season





Topic 3: Evaluating the CBT Approach



WHY CBT FAILS?

Despite the potential benefits listed above, the world is littered with failed CBT initiatives, where communities have not been able to sustain CBT activities for various reasons. We need to understand key reasons for the failure of CBT, so that we can avoid these pitfalls:

1. Insufficient **awareness raising** and **training** for community members.
2. Underestimating the amount of **time needed to develop** CBT.
3. CBT products do not meet minimum **safety and hygiene standards**.
4. CBT **activities are not sufficiently engaging** and fun for tourists.
5. CBT **services, programmes and prices are unclear** or unreliable.
6. Insufficient **marketing and promotion** of CBT products.
7. CBTs **lack marketing networks** and business partnerships.
8. Local community members **lack basic financial and accounting skills**.
9. **Conflict and jealousy** between community members.
10. **Inconsistent support** for CBT by responsible government agencies.

Flipped around, these each become **Critical Success Factors for CBT:**

1. Conduct sufficient awareness raising and training for community members.
2. Understand and allow for the **time needed to develop** CBT.
3. Ensure CBT products meet minimum, internationally expected, safety and hygiene standards.
4. Develop CBT **activities that are engaging** and fun for tourists.
5. **State** CBT **services, programmes, and prices clearly**, and ensure that they are **reliably and consistently delivered** by the community members.
6. Build channels to ensure sufficient, relevant, and appropriate **marketing and promotion** of CBT products.
7. Build CBT **marketing networks** and business partnerships.
8. Train and coach local community members **in basic financial and accounting skills**.
9. **Sensitively manage conflict and jealousy** between community members.
10. **Engender support** for CBT from responsible government agencies.

CBT FACILITATION SKILLS

CBT is much more likely to succeed when those who lead CBT initiatives have the right sets of knowledge and skills. CBT is at the crossroads of tourism and community development. CBT practitioners and facilitators therefore need to have a complementary set of skills, that bridges tourism and community development. The skills set has two clear areas of expertise:

Examples of Tourism Skills

- Knowledge of tourism product development and operations
- Tourism value chains and players
- Tourism marketing across channels
- Responsible Tourism

Examples of Community-work Skills

- Empathy and Social skills
- Group facilitation
- Training methodology
- Conflict management

The CBT development team will need to bring both of these two, distinct, professional skills set to CBT development, to complement the specific content about CBT capacity building, products, markets, etc in this manual. As the CBT development process moves forward, the team will need to balance and integrate tourism and community work knowledge and skills.

The team will need to sensitively and empathetically work with the community as a whole and as individuals; while forging trusting relationships with marketing partners. It is important that you maintain a broadly neutral position, helping stakeholders to understand each others' roles and responsibilities, needs, expectations and limitations. A lack of either of these skills sets inside your team, or sufficient empathy will risk the success of the CBT initiative.

A successful CBT is neither quick nor simple. Success requires time, patience, and the development of skills along the way.





Topic 4: Introducing the 5 C's CBT Development Process

As previously mentioned, during the past two decades, tourists' demand for local travel experiences has grown and become more mainstream. It's not surprising that many governments, tour companies and NGOs around the world have considered this trend to be a great opportunity to support more diversified and prosperous local economies, and decided to develop Community Based Tourism.

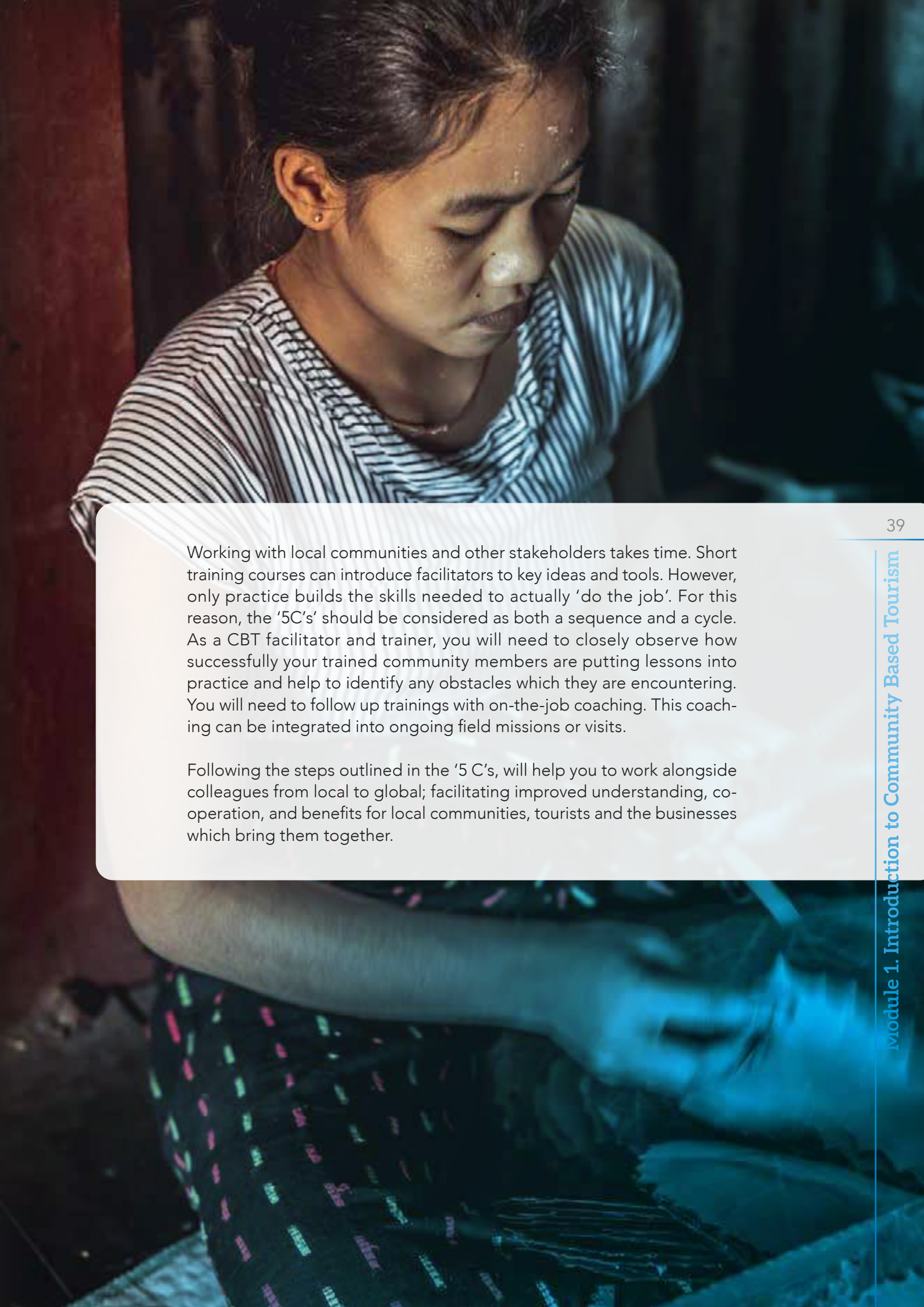
The ITC has been involved with CBT projects that have not only been successful, but have also been successfully replicated in other destinations. This body of knowledge is built on over twenty years of experiences, which ITC's tourism experts brought from other organisations and projects. The keys to success are summarised in the 5C's approach to CBT development.

OVERVIEW OF 5 C'S FOR SUCCESSFUL CBT

ITC's CBT development approach is based on 'The 5 C's'. These provide a step-by-step process, with supporting tools, for developing a CBT initiative, building local capacity, and facilitating responsive and respectful partnerships so that CBT can reach markets. The process and tools will be particularly useful for public sector and NGO staff who are responsible for rural tourism development and marketing; and for tour operators wishing to develop CBT which delivers great experiences and real local benefits.

The process is divided into 5 major steps:





Working with local communities and other stakeholders takes time. Short training courses can introduce facilitators to key ideas and tools. However, only practice builds the skills needed to actually 'do the job'. For this reason, the '5C's' should be considered as both a sequence and a cycle. As a CBT facilitator and trainer, you will need to closely observe how successfully your trained community members are putting lessons into practice and help to identify any obstacles which they are encountering. You will need to follow up trainings with on-the-job coaching. This coaching can be integrated into ongoing field missions or visits.


Following the steps outlined in the '5 C's', will help you to work alongside colleagues from local to global; facilitating improved understanding, co-operation, and benefits for local communities, tourists and the businesses which bring them together.



CENTER
CIBOT
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INTERNATIONAL
TELLOR

JAMAICA

YOUTH SPEAK UP
IT'S ABOUT YOUR CONSCIENCE

A group of people, including men and women, are seated around a long table outdoors. They appear to be in a community meeting or a training session. The setting is under a large, leafy tree, and the ground is sandy. In the background, there is a simple building with windows. A large blue circular overlay is positioned over the top half of the image, containing the text 'Module 2. Consider'.

Module 2. Consider



Consider

“

“Think carefully
before making a decision...
Take into account when
making a judgement.”

(Oxford Living Dictionary)



CONSIDER:

consists of the following five steps:

1 Prepare yourself and your team

2 Survey and identify a destination

3 Invest time and effort building trust

4 Raise awareness

5 Organise a study tour



This module will introduce the key steps and skills needed for initiating, developing, implementing, and sustaining successful CBT.

In this module, you will start your journey to become a CBT Facilitator. Being a facilitator isn't only about what you know, but also how you work alongside community members and others to build their knowledge and skills. At the start of the module, we will explore the qualities of a great trainer. Next, we will dive into the details of how to select a CBT destination, build trust with community members, assess potentials for CBT, and organise a productive study tour.

By the time you will have completed this module, you will be able to:

Prepare yourself and your team to be field trainers.

①

Survey and identify a suitable destination.

②

Build trust with community members.

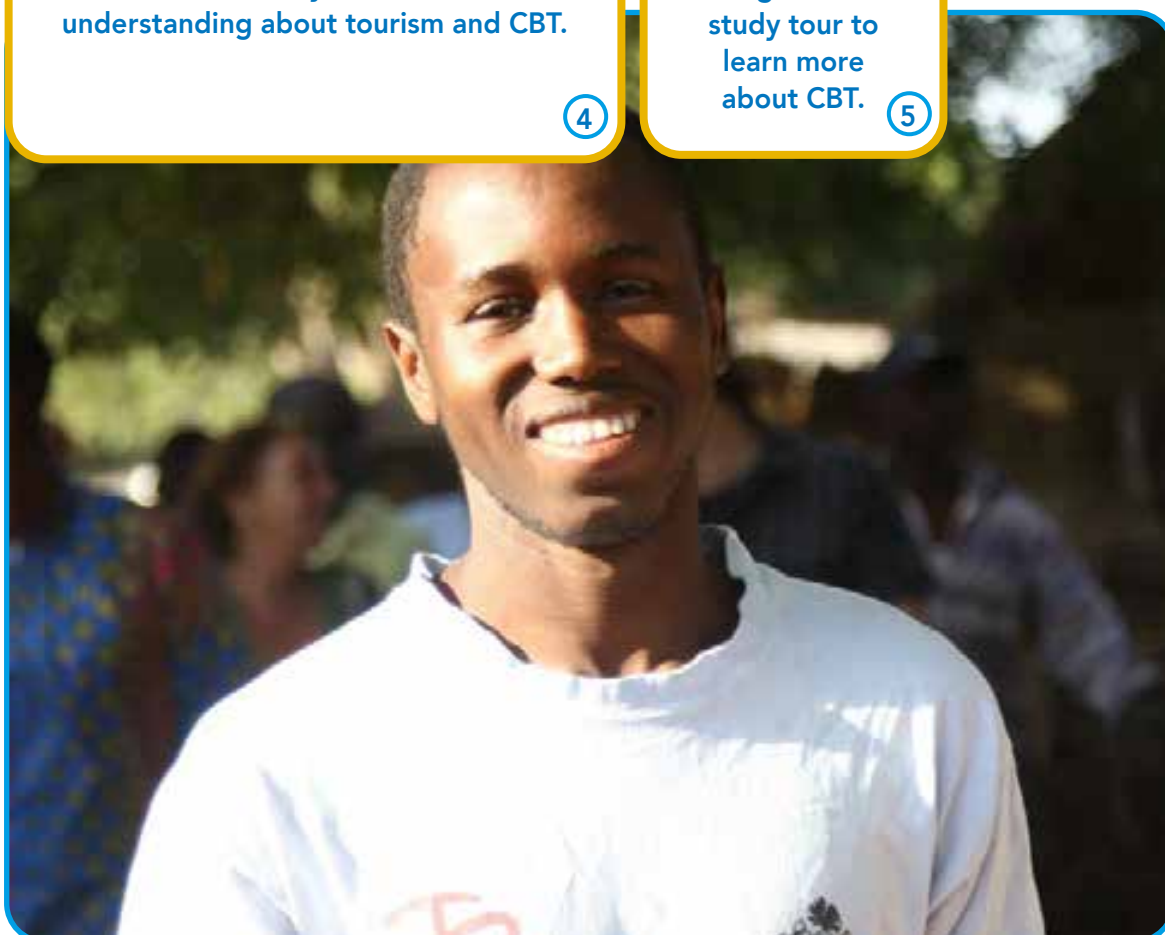
③

Raise community awareness and understanding about tourism and CBT.

④

Organise a study tour to learn more about CBT.

⑤





Step 1: Prepare yourself and your team to be field trainers

WHAT'S THE ISSUE?



Being a CBT facilitator means working at the crossroads of tourism and community development, with diverse stakeholders, from villagers to tour operators and government officers. CBT Facilitators will need knowledge and skills related to tourism and community work.

Expectations are high, while working in the field presents many practical challenges and limitations. These challenges may be physical, such as road access, unreliable electricity and phone coverage. They may be social, related to historic distrust, limited literacy, or simply fitting training around local peoples' busy lives.

The team needs two core knowledge and skills sets: tourism and community development. You also need empathy, and social skills to connect with people who live very different lives.

In the field. To succeed, you will need to develop your knowledge, skills and attitude, especially with relation to facilitation if you already have the tourism qualifications, knowledge and / or experience.

Tourism knowledge and skills which you need in your team include:

- identifying potential target markets, their profiles, needs and expectations;
- knowing which market channels are suitable to reach different types of tourists;
- working as a team with villagers to develop safe, fun, cultural tourism experiences;
- adapting these experiences to the needs of specific, target markets;
- identifying, assessing, and reducing / managing risks related to safety and hygiene;
- understanding how to include CBT tours into longer routes and multi-day itineraries;
- developing close relationships, trust, and confidence with tour operators;
- marketing and communicating authentic local experiences with passion and energy;
- producing materials to brief and influence tour operators, tour guides and tourists, and
- coordinating effectively with local people for bookings, confirmation, payment, etc.

Community development knowledge and skills which you need in your team include:

- deep listening and observation skills: always questioning your own assumptions;
- questioning skills, to find out complex information using very simple language;
- social skills to earn the trust and confidence of local leaders and villagers;
- mobilising and motivating villagers to join meetings, trainings and other activities;
- facilitating discussion and consensus, and diplomatically managing disagreements;
- designing and delivering CBT trainings at an appropriate level for your participants;
- working with tourism colleagues to guide product / experience development;
- managing and monitoring social, economic, cultural and environmental impacts, and
- working long, working late, staying cheerful, loving villages and never giving up

At the crossroads between tourism and community development, your team needs to understand how tourism can be used as a tool to support community development and positive social change. For example, a pure tourism perspective will see food only as a service. If food in the village is not good enough quality, then food will automatically be brought in from outside. A community development perspective sees opportunities to help local people cultivate new crops, develop more delicious and nutritious menus, improve food hygiene practices, improve their health, and create extra income by selling much better meals to tourists.



Attitude

Respect is a requirement for success. People know when they are respected. Community development workers experience more success when we respect 'project beneficiaries' as our equals and colleagues, and work as a team, towards common goals.

Our advice is to:

1. Beware of our attitudes and assumptions. They guide how we think, speak and act.
2. Enjoy village life: you are unlikely to be able to develop great CBT tours if you do not.
3. Aim to work with diverse groups: elders, women, youth, formal and informal leaders.



4. Be curious to meet local community members and learn about local ways of life.
5. Try to connect with people and understand their different perspectives and needs.
6. Cultivate a balanced appreciation of strengths and challenges in the community.
7. Accept that your project / task is not necessarily the top priority for local people.
8. Be flexible and adapt to local work schedules, especially during busy farming periods.
9. Be prepared to stay overnight when working in villages. This gives opportunities to:
 - » Observe peoples' daily routines from early morning until evening.
 - » Observe family relations and role division between sexes and generations.
 - » Observe standards of living and quality of life: e.g. food, bedding, toilets.
 - » Observe relations between extended family, generations, neighbours, etc.
 - » Be flexible and talk to people informally when they have free time.



These experiences will help you to identify local priorities for community development and potentials for product and experience development.

BE PREPARED

Put bluntly, one of the biggest obstacles to success is to view villagers as ignorant, poor, or pitiful. This leads one to underestimate peoples' potential and fail to appreciate their strengths. Pity can also foster a sense of entitlement, which undermines peoples' sense of responsibility. This impacts the project later when local people need to take ownership.

Faced with challenges, community workers need to maintain confidence in the potential of community members, and work to identify their strengths and skills. Our job as community workers is to help build local peoples' capacity and confidence to solve their own challenges.

Note: International tourism bridges countries and continents. The ITC project benefited from a combination of international, national, and local expertise. You will benefit from a team which can offer local to international perspectives, insights, knowledge, and networking.



CBT Facilitation and Training

Facilitation and training are two different skills sets and are used at different times and for different purposes. The table below summarises the difference between the two:

Facilitation: Conducting a process to reach an outcome

- Identifying and developing activities
- Developing menus
- Handling disagreements or conflicts
- Signing the CBT Agreement
- Establishing the CBT Group

Training: Teaching a person a specific skill or type of behaviour

- Local community guiding
- Artisans-tourist communication
- Hygiene and Safety
- Cooking
- How to engage with tourist

Key facilitation skills and techniques

The sections below share practical tips and techniques you can use when working in the field. Some specific competencies to focus on developing when becoming a CBT facilitator include:

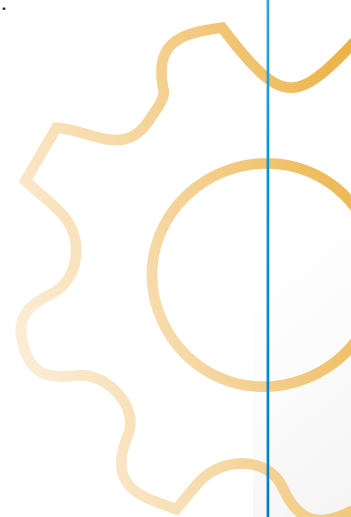
Community work knowledge and skills	Tourism knowledge and skills	Attitude to be a successful trainer
<ul style="list-style-type: none"> ▪ Designing simple training / media tailored to community members. ▪ Asking simple questions, related to local life. ▪ Building trust. ▪ Facilitating meetings, so that different groups can participate. 	<ul style="list-style-type: none"> ▪ Surveying tourism potential. ▪ Programme design. ▪ Training tourism service providers. ▪ Marketing, and working with tour operators and tour guides. 	<ul style="list-style-type: none"> ▪ Be considerate and flexible. ▪ Be interested. ▪ Consider community members as colleagues. ▪ Enjoy working as a team. ▪ Don't give up.

Here are the key things you need to plan and prepare before every facilitation or training event:

As a facilitator, you will need solid training design skills.

Training design should include:

- **Target group:** how many people will you train? What are their roles? Consider literacy, language, levels of experience and knowledge.
- **Culture and context:** are there any senior stakeholders who must be consulted? Are there any sensitive or taboo issues to avoid?



- **Objective:** what exactly do you want participants to understand or to be able to do? You need a simple, clear objective for every training.
- **Content:** what is the key information you will share with participants? Your content must be tailored to participants' ability and experience.
- **Process:** what are the steps you will follow in the facilitation or training event? What is the best timing and sequence of activities? How will your process build participants' skills?
- **Media and materials:** what media and materials will you need? What facilities will be available? How will you need to adapt your media?

SESSION PLANNING



The elements above are carefully considered and integrated into a training program using a session plan. A session plan is an important tool to use when planning any type of community intervention such as meeting, workshop or training event. Session planning should cover:

1. A clear outcomes or objectives.
2. The content you will share.
3. A step-by-step process to achieve a clear outcome or objectives.
4. The timing and sequence of activities.
5. If working in a team, plan division of roles and responsibilities.



Tool 2: Session Planning Template

Objective:

Time	Content: What	Process: How	Media/materials	Team: Who	Notes
------	------------------	-----------------	-----------------	-----------	-------

The next section provides examples of different tools you can include in your session design.

To be a great trainer, and design effective training programs and sessions, we need to be aware of **all the choices presented to us by our environment and tools**. We can often make small changes to our environment or

tools, which have a big, positive impact on our training.

For example, we can choose to simply move a few chairs, or sit on the floor, or run a session outside, and immediately create a much more energetic and positive learning environment.

The golden questions are:

- What choices do we have?
- Is there a better way to do it?

Let's take a quick journey through some of the choices which we have in our training design.



Here are some tips to see what kinds of choices you have available as a trainer, to create the most engaging and effective learning environment.

Choose how to manage the training space (a)

The way in which you manage your training space will depend on facilities and equipment you have available. However, you always have some choices.

Take a look at the two photos below.

- Why do you think the trainer here chose to move the tables and chairs?
- What other choices might she have had for class design?



Choose how to manage training space (b)

Both of the photos below show an 'open class' set-up.

- How are the set-ups different?
- What are the advantages and disadvantages of each set-up?



Choose how to manage paper/flip charts

A paper or 'flip chart' is an enormously powerful tool for trainers. However, you need to make sure that you manage it properly and avoid overwhelming or confusing your participants with information.

- Think in advance about how many key issues you need to communicate, or you expect participants to propose. Design your flip chart so that you can easily and clearly group this information. This will help when you need to summarise and draw participants' attention to key lessons.
- Look at the photos below. How many key issues have these trainers designed their flip chart to capture and communicate?



Choose how to use penwork to emphasise key learning points

'Penwork,' using colours, lines, and symbols, can help the trainer to emphasise important learning points, and help participants to focus their attention on specific groups of issues.



53

Choose how you group training participants

Option 1:

- Use an "open class" style, where you speak in front of everyone.
- Advantages include that everyone hears the same message, simultaneously and quickly.
- Broad consensus is possible.
- Disadvantages include that more confident participants may dominate.

Option 2:

- Separate the class into small groups or pairs. Advantages include that people will often feel more confident to speak. You can group participants by similarities (e.g. occupation) to learn about the perspective of a certain group.
- Or you can mix groups, so that different participants have a chance to listen to each other's ideas in depth.
- A disadvantage is that you need more time to manage and report the outcomes.



Choose how participants will present the outcomes of discussions

Option 1:

- Ask for members of the class to prepare class presentations.
- This energises the participants and builds confidence.

Option 2:

- Create “shopping” poster presentations.
- Following group discussions, one member of each small group stays behind to present the outcomes of the group discussion.
- Other groups rotate to listen to each other’s poster presentations.
- You can allow each group 5-10 minutes to listen to each presentation and then instruct them to “move” on to the next poster.



Choose how to manage responses



Here, the trainer has provided space for learners to write their individual answers on post-it notes and stamp them on a poster, which the class will later review. What do you think of this method?

- In addition, the trainer has used cartoons to group and communicate the three main ideas (head = knowledge, hands = skills, heart = attitude).
- What other way could you think of to manage learner responses?

Choose role play and games

- Engaging in roleplaying is a particularly effective way to do vocational training, as it can recreate the feeling of a ‘real’ situation on the ground.



Choose games, dance, music and performance

- Engaging in games or holding performances, meanwhile, can be effective to keep the attention of some groups of learners, particularly when participants do not have a formal education background.
- Games, dances, music, and performances can also help to liven up trainings. Make sure that there is a learning point in the game or activity. Here are some examples:
- Games: flashcards games, matching games, memory games, art / drawing to match and group ideas, to check memory and understanding, to review cause and consequences, to model teamwork (e.g. work as a team to illustrate a vision).
- Music and dance: As an icebreaker, as an example of different community resources, as a teambuilding exercise.
- Performance: To illustrate issues such as community participation, positive and negative impacts of tourism, roles and responsibilities, problem solving.



Choose how to adapt your media to the field

- In the field, never rely on technology or facilities. You may need to deal with power-cuts, torrential storms or even wild animals! Design media which is as rugged as possible, and adaptable to a wide range of conditions. For example, use rain-proof laminates or vinyl.



TEAMWORK: CO-FACILITATION

Trainings can be busy and challenging environments. Sometimes the trainer will have to manage large numbers of highly diverse participants, competing to share their ideas.

To manage the training environment, trainers often work in teams. For example, the 'lead trainer' may lead a discussion from the front of a class or meeting, focusing on the participants and their responses, while an 'assistant trainer' may focus on recording and summarising participants' ideas.

If the workshop includes small group exercises or 'break-out groups', facilitators may share roles, by taking responsibility to lead or observe different groups, based on different issues, different types of participants, etc.

All these elements, roles and responsibilities should be planned and sequenced using a session plan. Using a session plan, you define your session objectives, the timing and sequence of activities, key content you will share, and your step-by-step process to achieve your objectives. [Effective facilitation teams plan their session in detail, in advance, using a session plan.](#) They agree exactly how they will divide their roles and responsibilities.

BE PREPARED

As a CBT facilitator your job is to support local community members to realise their potential, overcoming challenges in the field. As described above, your success will rely on your knowledge of tourism and community development, and your skills in training and facilitation.

However, please be aware that your attitude is also a crucial ingredient of success.

The 'giver-receiver' dynamic of international aid can be unbalanced. Neither arrogance on the part of the 'givers' nor a sense of entitlement on the part of the 'receivers' are useful attitudes for a successful partnership or project. It will help you to start work with a firm, conscious conviction in the value of your partner communities' lifestyles and cultures; belief in local community members' potential to manage and operate successful CBT tours; and the intention to work as colleagues to achieve this together, as a team. Good luck!



Step 2: Survey and identify a suitable destination

WHAT'S THE ISSUE?

Not all communities are suitable to develop community-based tourism. Many internal and external factors influence the potential and success of a CBT destination.

Successful CBT destinations require a combination of **internal and external strengths**, including **tourism potentials** (e.g. distinct product highlights and market potential), and **community potentials** (e.g. local capacity, effort and cooperation). In the past, many CBTs have failed because they did not have sufficient potential. Therefore, it is essential to carefully assess the potential and feasibility of a new destination before starting work.

IN THE FIELD: SUITABLE DESTINATIONS

Criteria to assess CBT potential

CBT potential is influenced by important **internal** and **external** success factors. For example:



Tool 3: Criteria to assess CBT potential

Internal Success Factors	External Success Factors
<ul style="list-style-type: none">■ Unique or special highlights.■ Warm and welcoming people.■ Interesting culture and way of life, with high potential to develop hands-on experiences.■ Attractive, scenic nature (e.g. forested trails, rivers, picnic spots, viewpoints).■ Local knowledge of the natural world (e.g. forest, sea, herbal remedies, etc.).■ Basic facilities (e.g. running water, toilets, community hall).■ Villagers generally cooperate and work together effectively.■ No extreme sensitivity (drugs, smuggling, prostitution, etc.).	<ul style="list-style-type: none">■ Sufficient market potential.■ Connectivity and frequency of transport (air, road, rail, etc.) to nearby tourism destinations.■ Located less than 2 hours or 'on the way' between tourism hubs, (ideally all year access).■ Potential to include the village into existing tourism routes.■ Active government support / aligned with policies and plans.■ Local organisations prepared to support CBT for the first 12-18 months (NGO, CSO).■ Potential for local business partnerships (e.g. local tour operators, tour guides, hotels).

A recommended process for identifying a suitable, new CBT destination is to consult with stakeholders, and use these criteria to develop a 'long list' of several possible communities.

Then, narrow this 'long list' down to a 'short list' of communities with highest potential.

This is how to run the process:

1. Invite project partners to join the CBT destination survey team. Explain the selection criteria carefully and why they are useful.
2. Identify stakeholders with deep knowledge of tourism and local communities in your target area (e.g. experienced tour operators and guides, Tourism Ministry staff, NGOs / CSOs). Organise interviews or a focus group. Explain the criteria and ask the participants to suggest potential cultural tour destinations.
3. Map the locations of this 'long list' of potential communities.
4. Project partners meet again to discuss each village proposed by the tourism stakeholders and score each village with the criteria.
5. According to the scores, prepare a Shortlist of between 2 to 6 communities, which are most likely to have high potential.
6. Contact these villages and organise a 2-day field survey per village.
7. Conduct the survey with community representatives, visiting key places, people and activities. Give a score based on the criteria.
8. Do not create high expectations (the village may not be selected).
9. Analyse the survey results with the project team and partners.
10. Select the final one or two communities which the team assesses have the highest potential for successful CBT development.



Assessing market potential: tips for conducting simple market research

Market potential is probably the most important criteria of all. Without sufficient tourists, CBT will not succeed. As the trainer, you will need to familiarize and update on current market trends and be able to identify which trends are a real opportunity for your specific destination.

1. **Read market research** to identify different types of tourists who are generally interested in local, cultural experiences. E.g. by CBI, SKIFT, UNWTO, WTTC
2. **Interview tourism associations** and major DMCs / ITOs organising tours to your country. Do they think that your destination has potential for community-based tours?
3. **Learn more about tourists** who already visit close to your area: visitor numbers, nationalities, ages, reasons for travel, do they arrive independently or book with a tour operator?
4. **Consider which of these groups could be interested in CBT**, and visit in sufficient volumes to support new CBT products?
5. **Identify your target markets and good potential channels to attract them**. E.g. by working with tour operators, clubs and associations, schools, or direct using online marketing?





BE PREPARED

Use your criteria. Think carefully before choosing an established tourism community which you know is experiencing serious challenges. Instead, consider choosing a new destination with the potential to be a successful model. Other communities, which are experiencing problems, can learn from this practical example later, after CBT has been developed.



Step 3: Build trust with the community members

WHAT'S THE ISSUE?

Once you have identified communities with potential for CBT, you need to confer again with community leaders, to confirm if they are definitely interested to consider developing community based cultural tours. If the leaders agree, then, before beginning any formal activities, take some time to get to know and build trust with local people. At this point, the project is our business, not their business. We need to earn interest, by showing interest first.

While we get to know local people, and build trust, consider:

- ■ Are local people interested in tourism?
- ■ Do they have any positive and negative experiences of tourism?
- ■ What do local people expect or understand about tourism?

This information can help us to plan the next steps.

IN THE FIELD: BUILD TRUST

1. Conduct home visits to meet local people and learn what they do during the day.
2. Offer to join local people in the fields, or on the farm to experience their daily work.
3. Try to learn a few words of local language and offer to 'have a go' at daily activities.
4. In many cases, people enjoy talking about and asking about family, children, etc.



Listen carefully

1. Ask about the history and traditions of the village, occupations, faith, festivals, etc.
2. Ask local people what their challenges are and what they would like to learn to do.
3. Ask what people understand about tourism and might expect from the project.
4. Observe and record motivations and / or potentials to develop cultural tourism.

This information will also help us to plan forward. For example, we will know if the villagers have no expectations, or expect income, or are simply happy to follow the leaders' decision.

Other important trust building activities include:

- Meet community and spiritual leaders. Ask about history and traditions of the village. E.g.: occupations, faith, festivals, etc.
- Visit youth and women's groups, conservation, or arts groups. Ask about their roles in the village and their interest in tourism.
- Let people know about CBT if they ask. Keep explanations short and simple. Focus on the villagers, not on yourself.
- At this point in CBT development, process is more important than collecting information. We are demonstrating that we are genuinely interested in local ways of life.

Working with colleagues from the same ethnic group as target communities can help you to connect with community members and earn trust.



BE PREPARED

Another trust building technique is to respond quickly to a specific request made by the villagers. This shows that your team is sincerely interested in local priorities. In Pan Pet village, several local ladies ran small crafts stalls, by the roadside. These ladies expressed a desire to learn some English, to help them sell handicrafts. The ITC team offered to hold a spontaneous English class. Most of the ladies were illiterate. They could not write down the words they had learned, to revise and use later. Nevertheless, the process of teaching English was enjoyable for the villagers. It acted as an icebreaker and helped to plant seeds of trust.



Some communities have experienced conflict and very traumatic events in the past. Questions about history and 'how the village used to be' can stir traumatic memories. Therefore, consult carefully with local colleagues before asking questions about village history. Nevertheless, if an area is a well-known conflict site, it is highly likely that tourists will ask about this history. In this case, the team will need to work sensitively with the villagers to help them to prepare for these questions and answer in the way they feel most comfortable.



Step 4: Raise community awareness & understanding about tourism & CBT

WHAT'S THE ISSUE?

Successful CBT requires:

- Participation by local people
- A fairly long commitment of time and energy (at least 1 year)
- Preparation to welcome and satisfy guests
- Effective management: e.g., bookings, payments, accounts



By now, we have started to get to know people in the community. Often, local people will gradually become more interested in what we are doing in the village and start to wonder if our work might be an opportunity for them!

The next step is to introduce community leaders and members to tourism, tourists, and CBT; and to consider some of the positive and negative impacts of tourism. This can be achieved by organising an awareness raising workshop.

As a trainer and facilitator, good preparation is a vital key to success. As we discussed in Step 1, you will need to plan carefully:

- What issues or content you will focus on.
- How this content will be presented so that it is stimulating and easily understood by the participants.
- How you will engage your participants during the training.
- How you will manage time.

You also need to think carefully about how you will manage the practical limitations of running a workshop or event in the field: availability of facilities, equipment, weather, etc.



IN THE FIELD



Introductory workshop

How to organise an introductory, awareness raising workshop

These are the steps to organise an awareness raising workshop:

Preparation

- Confirm which local stakeholders need to be consulted about the workshop.
- Make appointments well in advance with formal and informal leaders.
- Try to invite a cross-section of community members to attend the meeting. Request assistance from village leaders to inform and invite these people to the workshop.
- Confirm literacy levels. Can participants read and write? Will you require special / extra translators to ensure clear understanding?
- Find out in advance if you will have access to electricity. This will help you to decide what types of media to prepare in advance.
- Prepare photos to illustrate each key question.
- If you have electricity, you can prepare short videos, clearly showing tourists enjoying CBT activities in comparable communities (e.g. similar environments and standards of living).
- However, **don't trust power supplies**. Also prepare **simple** laminated photographs, vinyl, posters or PowerPoint slides of the key content.
- Prepare flip chart, pens, sticky tape, and objects for the 'stone, flower, book, rock, money' game about the impacts of tourism (see Tool 4).
- LCD / small electric generator / big white sheet if you want to use video.



Key content to share with community members in the workshop

Community members usually need to gain more awareness and understanding of tourism, why people travel, what people are interested in, and why tourists would want to visit their community. At the workshop, the following information can be presented to the community:

- **What is tourism?** Show food, transport, accommodation, activities, souvenirs, guides.
- **Who are tourists?** Present different kinds of tourists by different nationalities, ages, etc.
- **Why do tourists travel?** e.g. to relax, adventure, honeymoon, beaches, culture, pilgrimage, etc.)
- **How do tourists arrive?** Different types of transport, tourism supply chain and actors.
- **Why do tourists want to visit a village?** Meet the people, warm welcome, authentic experience, etc.
- **What is CBT?** Do, Learn, Feel, Share, Benefit, Management / Systematic Training + Partnerships
- **How can communities' benefit from CBT?** New skills, income, celebrate culture, community fund)
- **Main steps of the CBT process:** 5 Cs
- **Main positive / negative impacts** of tourism

A key aim of the workshop is that community members will understand that tourists are not 'all the same' and many different people have to work hard before tourists eventually arrive in the community to enjoy CBT.

Delivery

- At the start of the workshop, introduce your organisation, your team, the aims of the workshop and the agenda.
- Be prepared and open to slow down and answer questions.
- Keep your content simple and visual. Use videos or laminated photographs / slides which clearly illustrate the main content.
- Show participants the slides about tourism, tourists and CBT one by one.
- Ask questions to draw attention to specific details of each photo.
- Give participants opportunities to do tasks in small groups and then present their ideas, followed by an open discussion. This will help to prevent open discussions being dominated by very confident people.
- Present the next steps in the CBT process and emphasize that the community members do not need to make a decision about CBT yet.



Appropriate media to illustrate your content

Issue	Key media / content you can use to introduce the issue
What is tourism?	Photos / slides showing examples of tourists using transport, food, accommodation, activities, souvenirs, tour guides.
Who are (different types of) tourists?	Photos of tourists of different ages, nationalities, types of group. E.g., couples, families, students, seniors, volunteers
Why do tourists travel?	Photos of tourists doing different activities. E.g., relaxing, romantic dinner, family activities, listening to music, shopping.
How do tourists arrive?	<p>Photos which 1) show the different actors in the supply chain, travel agents, tour operators, DMCs, etc. and 2) show the different types of transport tourists may take to arrive.</p> <p>A key point is to show a lot of work is required before tourists arrive.</p>
Why do tourists want to visit our village?	Photos of cross-cultural exchange, visiting local sacred sites, artistic performance, eating local food, visiting scenic spots.
What is community-based tourism?	Photos which clearly illustrate: DO, LEARN, FEEL, SHARE, BENEFIT, MANAGEMENT. Please see below for more details
What are the main steps of CBT development?	E.g.: community study, study tour, product and experience development, training in food safety, management, FAM trip
What are the opportunities and risks of tourism?	E.g.: skills, income, teamwork, nature and culture conservation / litter, overcrowding, conflict, and jealousy
Responsible Tourism	E.g. photos of waste management, tourists being briefed on do's and don'ts when they arrive in the community



A simple process to introduce the elements of CBT

Show a short video, or provide a set of laminated photos, which show tourists using various CBT services. It's important that the media shows tourists enjoying 'hands-on' activities.

Draw your participants attention to the video/photos by asking the following questions:

- **Who** are the visitors?
- **Do**: what are visitors and local people doing in the photos?
- **Learn**: what do you think tourists have a chance to learn?
- **Feel**: how do you think that the visitors and villagers feel?
- **Share**: who is sharing the experience?
- **Benefit**: how can local community members benefit from CBT?
- **Management**: what kind of training and preparation is needed for community members to be able to deliver this experience?

Facilitate an open discussion about participants impressions of the video.

Show the community members: what are the main steps of CBT?

Next, you introduce the community members to some of the key steps to develop CBT. This is a simple overview to set realistic expectations, and does not need to cover every step. There should be enough detail so that community members at least see examples of:

- Community study to explore CBT potentials in more detail
- Study tour (if possible) to see a real example of CBT
- Surveying the community, brainstorming, and consulting with tour operators to identify high-potential CBT activities
- Organising a Community Agreement to review progress and decide to go ahead with CBT
- Training to establish CBT management, and develop new services and experiences (food, local guides, etc)
- Food and safety training
- Working with tour operators and tour guides

Tool 4: Stone, flower, money, egg, book game

Stone, flower, money, egg, book game

This small group exercise explores the positive and negative impacts of tourism. It is a useful activity, because it relates positive and negative aspects of tourism development to familiar objects, which community members will almost certainly be used to seeing in their daily lives. The activity is flexible and adaptable. The process below is only a suggestion.

Objective of activity:

Invite community members to consider the positive and negative impacts of community-based tourism, through creative comparison with familiar objects.

Preparation/Resources

- Some wild flowers
- An egg
- A medium sized stone
- A book
- A banknote

Delivery

1. Divide participants into five groups
2. Distribute the objects: 1 object per group
3. Participants are asked the following questions:
 - Explore the elements of tourism or CBT:
4. Compare your object to tourism
5. What aspects of the object could be positive or negative, when compared to tourism?
6. How is your object a necessary element of successful tourism?

Explore the positive and negative impacts of CBT:

7. Imagine that your object is part of CBT
8. How can tourism benefit the community / environment?
9. How could tourism be a risk to the community / environment?
10. Present their conclusions to the class in a creative way



11. Possible answers include:

	Flower	Stone	Money	Book	Egg
Necessary for tourism	E.g. nature, scenic areas, beauty.	E.g. history, infrastructure, construction	E.g. income, investment, salary, tax	E.g. training, knowledge, permission	E.g. food, creativity
Positive impacts	E.g. protect environment, beautiful	E.g. unity / teamwork	E.g. income, jobs, reduce poverty.	E.g. training, new skills / knowledge	E.g. create / restore / new opportunities
Negative impacts	E.g. easy to lose beauty / freshness	E.g. interrupt / burden on family life	E.g. conflict / jealousy / materialism	E.g. outside guides mis-represent us	E.g. fragile, easy to break



BE PREPARED

Remember to make appointments in advance with formal and informal leaders. Try to invite a cross-section of local people to attend the meeting and learn about CBT services and activities, roles, positive and negative impacts. If you are being assisted by community leaders, local NGO staff, etc. (e.g., as small group discussion facilitators or translators of ethnic languages) make sure to brief them in advance about the objectives of the workshop, key content and questions, so they can help motivate villagers to engage and discuss.



Step 5: Organise a study tour

A CBT study tour is an educational field trip to visit an existing CBT community.

WHAT'S THE ISSUE?

The value of organising a study tour / field trip to an existing CBT destination is:

1. Community members can directly experience and better understand CBT
2. They can listen to other community members' experiences offering CBT
3. They can learn more about the potential positive and negative impacts of tourism

IN THE FIELD

Study trip preparation and delivery

Preparation of study tour destination / community / key resource people:

1. Confirm how much budget you have. This will define how far you can travel.
2. Identify and choose a CBT destination with a similar socio-cultural or natural context (so that lessons learned are as relevant as possible). Consider language barriers.
3. Contact potential partners to organise the study tour if necessary (e.g. local government, NGOs or specialist tour operators based close to the community).

4. Prepare key resource people in the study tour destination, by briefing them on your participants, learning objectives and expected outputs (what you want participants to learn / experience). Ask for their input on the best programme to meet your objectives.
5. Ensure that specific local resource people with unique experience / knowledge / skills will be available and have time to demonstrate / discuss with your participants.
6. The study tour should not be a 'one man show'. It is important that the participants see how roles are divided between different community members to deliver CBT.

Preparation of participants and study frame:

1. Carefully select at least 5 community members to participate in the study tour, ensuring a variety of roles and perspectives. E.g.: leaders, elders, women and youth.
2. Carefully consider and plan an appropriate learning process for the participants' level of education and experience, language and literacy, and levels of self-confidence.
3. Prepare field assignments for community members to conduct during the study trip.
4. Design an appropriate group dynamic. E.g.: individual work / couples / small groups.

Delivering the study tour

1. Explain the overall programme. Assign participants into groups.
2. Explain that key activities during the study tour are 1) participation in CBT activities, 2) observation and 3) discussion. Explain the small group learning assignments. Ask the participants to delegate responsibilities for data collection.
3. Coordinate with local partners to ensure that the study tour visits all the agreed people, places, and activities.
4. During the study tour, actively facilitate discussion between local stakeholders and your study tour participants. If possible, organise meetings or a panel discussion with stakeholders outside the village (GOV/NGO/Tour Operators).
5. At the end of the programme, participants should consider how they will apply their learning back in their own village.



Tool 5: Field Assignments on Study Tour

Field Assignments



Brief the study tour participants to focus on the following issues during the study tour so that they get maximum benefit and learning from the experience:

1. **Product:** What services / experiences are offered? How have local nature, culture, and people been included in CBT programme design? How are products and experiences priced? What training was delivered for food, guides, etc.?
2. **Tourists:** What kinds and volumes of tourists visit the community (age, nationality, etc.)? How do these tourists arrive (e.g. through tour operators, self-drive, etc.)? What is the behaviour of different types of tourists? What are the specific benefits and challenges of welcoming different kinds of tourists?
3. **Management and People:** What are the roles and responsibilities of CBT staff? How do the communications, bookings and accounting systems work? How do communities work with DMCs? How do local community guides work as a team with licenced tour guides to deliver a successful and safe CBT programme?
4. **Impacts:** What are positive and negative impacts for society / economy / environment / culture / cooperation? How are benefits shared and managed? How are negative impacts reduced and managed? Any community fund? How does the fund work?

After the study tour

1. Ensure participants share their experiences with villagers who could not join the trip.

BE PREPARED

During field assignments, you will need to decide whether to **group** or **mix** participants by language, ethnicity, home village, age, roles, etc. When assigning groups and tasks to participants, be aware that language barriers and social norms between participants of different ages, status, etc. can be an obstacle. Ensure that you have enough translators.

In the field, you may also need to manage observers, such as government or project staff. In these circumstances, it is easy for participants to become overwhelmed by observers' inputs. To manage this, it is important to divide participants into groups with clear roles and assignments. Give clear instructions to observers, so they know how to engage in the training process and do not accidentally disrupt it.



Summary Action Points: 'C' consider

Prepare yourself and your team

- You need a balance of skills and knowledge in tourism and community development.
- Tourism: product development, pricing, sales and marketing, operations and guiding
- Community development: know how to use tourism as a tool to support community development. Be able to mobilize, facilitate cooperation, train, and coach
- Success requires empathy, respect and appreciation for local people and their ways of life.

Survey and identify a destination

- Successful destinations require a combination of tourism and community potentials.
- Always assess the potential and feasibility of a new destination before starting work.
- Confer with local tourism stakeholders to identify a 'long-list' of possible communities.
- Use clear criteria (see page 25) to define a 'short list' and select a final CBT destination.
- Beware of destinations with a high level of internal conflict. This is a serious red flag.

Invest time and effort building trust

- At the start of the project, take time to get to know and build trust with local people.
- Remember that at the beginning, our project may not be local peoples' priority.
- Meet people, join in daily local activities, explore the area, and try to build trust.
- Be prepared to spend long periods of time in the field / stay overnight / stay positive.
- A good, initial trust building technique is to respond quickly to a specific request.

1

2

3

Raise awareness and understanding about tourism and CBT

- A first formal step is to introduce community members to tourism, tourists, and CBT.
- A useful frame to introduce CBT is: Do, Learn, Feel, Share, Benefit, Management.
- Be open that CBT requires participation, commitment, and preparation. It takes time.
- The 'Egg, Flower, Money, Book, Stone' game (see Tool 4) is a good activity to explore the positive and negative aspects of tourism, because it is based on familiar objects.

4

Organise a study tour

- A study tour helps community members to have direct experience of CBT.
- Look for a study tour destination with a comparable socio-cultural / natural context.
- Rigorously prepare the hosts (study tour destination / resource people) and participants.
- Prepare an assignment for participants: CBT products, tourists, management, impacts.

5



Module 3. Conceive







Conceive consists of the following steps:



Conceive

“To create by fertilizing... To form or devise a plan or idea.”

(Oxford Living Dictionary)

By now, community members have begun to understand tourism, tourists and CBT. Ideally, community representatives have returned from a study tour to experience CBT in practice, and to learn directly from the experiences of other communities in a similar environment.

Now is the time to ask community members if they are interested to continue to develop CBT in their community? It is not necessary for the whole village to participate actively in CBT. CBT can begin with a relatively small group of motivated families and individuals. However, these community members should have the support of important local stakeholders, such as political and spiritual leaders.

Your work in this second ‘C’ Conceive’ is to train and support community members to survey community potentials, brainstorm and shortlist CBT activities, make a community agreement and facilitate a vision for CBT.

By the time you will have completed this module, you will be able to:

Step 6: Conduct a community study

WHAT'S THE ISSUE?

Conducting a community study alongside local community members allows us a unique 'inside out' perspective, helping us to step outside our own experience and see an area through the eyes of local people. A community study also makes us more aware of local cultural norms and taboos, and how they may affect CBT product design.

The community study is important because:

- It is a toolkit which allows CBT trainers to quickly collect information and assess key strengths and weaknesses before developing CBT.
- The study develops a stock of information to inform CBT programme design, community guide training and management.
- It raises community members' awareness about their history, culture, and natural resources through a participatory process.
- It also involves villagers in the process, which can motivate them to be interested in CBT and actively participate in next steps.
- The study helps to identify suitable places and activities for developing CBT.
- The study collects information which can inform future tour guide training and promotion.
- Additional benefits of a community study are that we can also:
 - » Observe how work / social roles are divided in the community.
 - » Identify skilled, knowledgeable, and active community members, including people who are particularly interested in tourism.
- Observe serious 'red flags' which are obstacles to success, such as low trust and cooperation among community members, high workloads, and conflicts managing money or other resources.



WHAT IS A COMMUNITY STUDY?

A community study is a survey (with tools) that allows CBT facilitators to quickly assess key strengths and weaknesses before developing CBT. The study uses professional community development tools and techniques, observation and participation to collect, summarise and analyse data about local natural and cultural resources, history, livelihoods, beliefs, etc.

As a CBT facilitator, you will work together with local community members, staff or volunteers, (and translators if necessary) to collect this information, using the tools presented in the sections below. Survey results are then summarised and presented to community members, including leaders, elders, women and youth representatives for their input and feedback. It is essential to include this 'returning' of information to the community in your community study process, so that you can check if your information and analysis is accurate.

The community study is an ideal opportunity to include village elders and leaders in the CBT consultation process, so they can gain awareness and share their ideas from the beginning.

Before starting a community study, it is important to be very clear about exactly what kind of information you need to collect in the time which you have available. Community study objectives in different communities will usually include learning more about local livelihoods, culture, history, beliefs, the natural environment, etc. However, **local contexts and highlights will influence the details of how you design your community study, and what issues you decide to focus on.** For example, if an area is renowned for a particular, rare endemic species, then you will need to learn how this species is connected to local peoples' daily lives.



IN THE FIELD

A community study can be conducted in three phases:

Phase 1: Research:

- Data gathering: field research, interviews, mapping, calendars, timelines, transects, etc.

Phase 2: Summarise Findings

- Collate responses, identify current status, analyse strengths and weaknesses.

Phase 3: Community Consultation Workshop

- A workshop to:
 - » Present and discuss/confirm results of Phase 1 and 2.
 - » Review Strengths, Weaknesses, Opportunities and Threats.
 - » Confirm potential tourism assets identified in research phase.

Phase 1: Research

Preparation for the community research

Prepare the facilitators and team:

1. Decide which **key issues** to study, considering the local context and priorities.
2. **Train your team** how to use the data collection tools (e.g. how to conduct interviews, mapping, cultural and agricultural calendars, stakeholder mapping, etc.).
3. **Contact community leaders** well in advance. Explain the purpose of the community study.
4. Ask the local leaders to identify and invite a group of 15 – 20 community members to voluntarily assist with the community study.

Prepare the community members:

1. Brief the villagers on the purpose of the study and the tools which will be used.
2. Brainstorm “Our Good Things” with the community members, based on 3 main categories: Nature, Culture, People. This will help you to identify important people, places and activities which should definitely be included in the community study.
3. Divide into 4 groups to collect information using the tools.



Delivery: conducting a community study

1. Participate, observe and learn more about life in the community through home visits, survey and transect walks.
2. Hold meetings, discussions and interviews in small groups (e.g. men, women, elders, etc.) and with individuals (e.g. village chief, village shaman, president of womens' association).
3. Divide into 4 small groups to collect further information from relevant and knowledgeable community members using the community study tools. For example:
 - » Maps (youth)
 - » Calendars (adults)
 - » Timeline (seniors)
 - » Stakeholder mapping (formal leaders).
4. Work with villagers to make the internal and external maps.
5. Work with villagers to make agricultural and cultural calendars.
6. Study local history and visualize change over time in the community using timelines.
7. Collect this information in a team with local community members and then work together to summarize lessons learned and identify strengths and weaknesses (SWOT)
8. Prepare to present results back to community leaders to verify the results / get feedback.



Tools for a Community Study

The key tools used in a community study are:



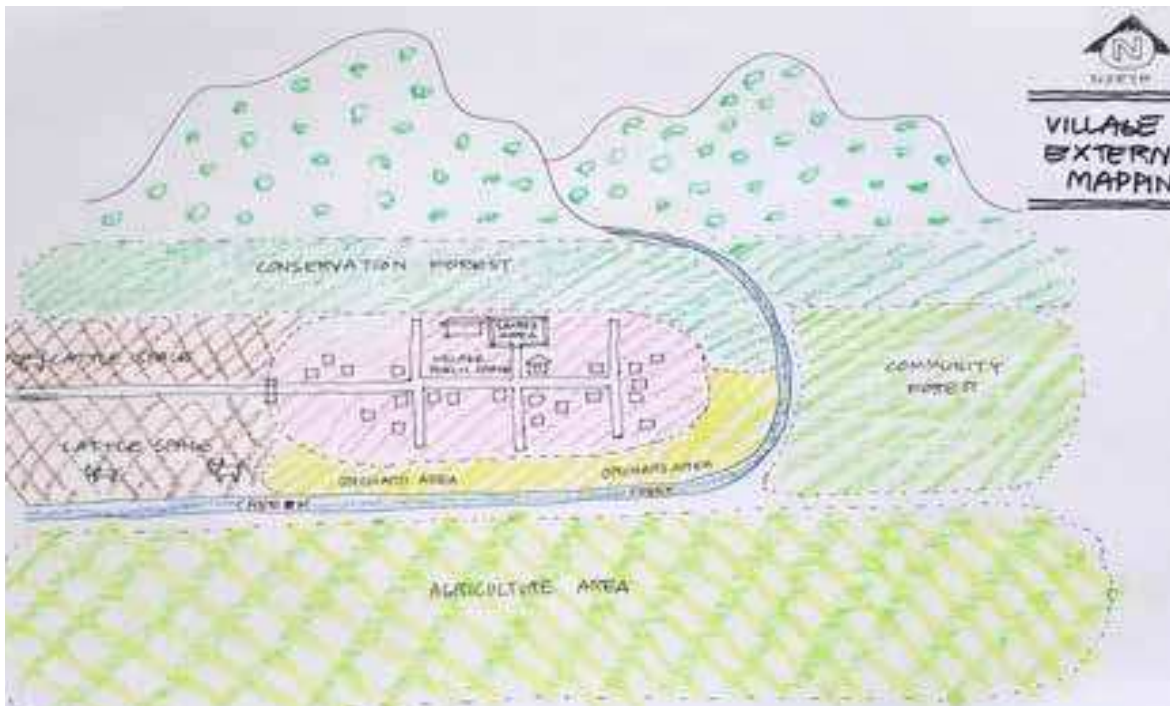
1. External and internal maps
2. Cultural and agricultural calendars
3. Timelines, to show change over time, and identify "What do we want to conserve and what do we want to change in our village?"
4. Stakeholder mapping

These tools help to collect important information, which can then be analysed using SWOT (Strengths, Weaknesses, Opportunities, Threats) and used as a foundation to plan necessary steps of CBT development.

An **external map** clearly identifies natural resources, agriculture and common areas, land rights and boundaries. You need to confer with knowledgeable community members to map these resources. Different types of resources can be identified on the map, using special symbols or patterns. The map should include roads and paths, distances and directions.

Try to quantify areas as much as possible. Annotate the map with additional information about how the resources are important, and how they are connected to the community – in terms of livelihoods, cultural and spiritual practices.

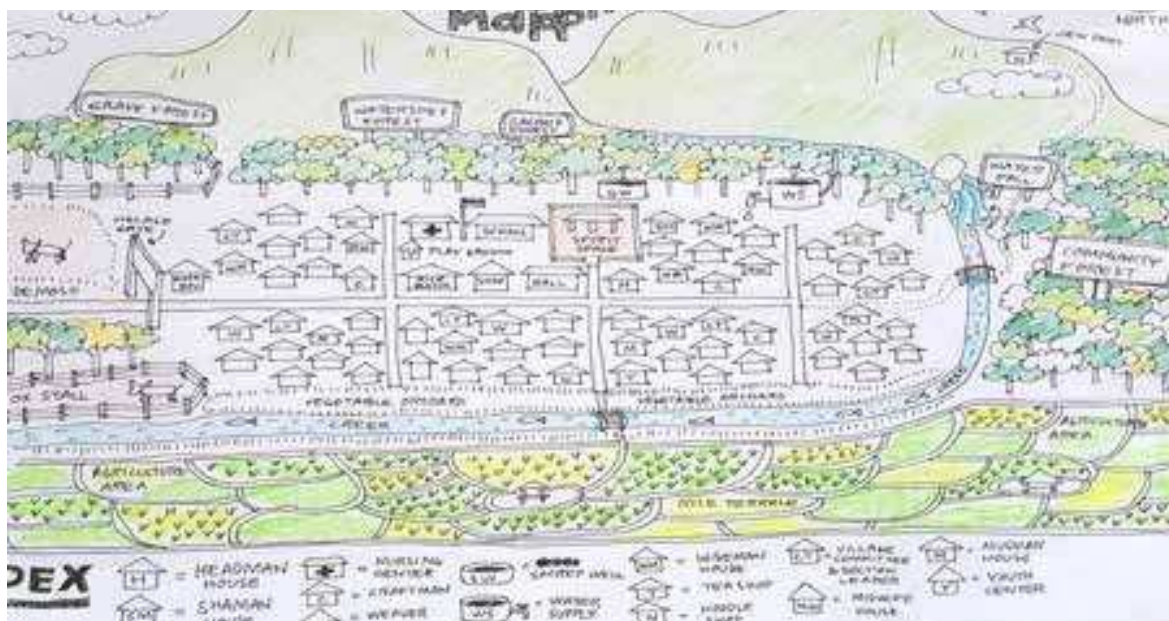
The map will also help you to see if the community will need to cooperate with Protected Area officials. You will easily see potential for nature-based activities, such as trekking or bird watching. Remember that scenic areas can also be full of sacred, historic sites. Mark cultural sites (burial grounds, sacred springs, etc.) which may have special taboos.



An [internal village map](#) identifies village sites, public buildings and infrastructure, formal and informal leaders, and the distribution of roles and responsibilities in the village. We use symbols to map the location of important landmarks, places and people. We map routes and paths, distances and directions. The map helps us to identify potential tourist attractions.

By studying the map and researching roles which are held by different people and households, we also learn who is active, who is overworked and who may have time to participate in CBT. We can identify 'local resource people with special skills, to join a CBT tour (e.g. artisans and musicians).

We should also annotate the map with additional information about how these resources are important, and how they are connected to the community in terms of livelihoods, socio-cultural and spiritual practices.



Agricultural and cultural calendars are used to identify important and busy times of the year. The information is usually collected through interviews with local experts who have deep knowledge about agricultural, natural, and spiritual cycles throughout the year. The calendars help community members to manage their time and prevent overlapping schedules.

We can consult over which festivals, seasons etc. are suitable for welcoming tourists. We can also design tours to join special festivals or celebrations, which villagers feel proud and comfortable to share with visitors. Coloured quadrants can be used to further define how busy villagers are during different months of the year. For example, a particular activity such as harvesting crops may take 25%, 50%, 75% or 100% of peoples' time.

Agricultural / cultural calendar image from the field here

Tool 6: Cultural, Agricultural and Seasonal Calendar

		JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEP	OCT	NOV	DEC
1	VILLAGE SPIRITUAL WARDEN			■									
2	SPIRIT HOUSE WARDEN			■									
3	CARVED WOOD CEREMONY						■						
4	RICE HARVEST CEREMONY										■		
5	TRADITIONAL ANNUAL FESTIVAL												
6	TRIBE ANNIWEAR		■										
1	RICE						■						
2	CORN							■					
3	SOY BEAN								■				
4	GARLIC									■			
5	SESAME										■		

#	Activity	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept	Oct	Nov	Dec	Notes
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Cultural Activities

1

2

3

4

5

6

7

8

Agricultural Activities

1

2

3

4

5

Seasons

1

2

Timelines are an excellent tool to map histories, positive and negative events, changes, and trends which have occurred between a particular point in the past (e.g. 5, 10 or 20 years ago) and the present. We use timelines to identify historical events, turning points, reasons for changes and the impacts of changes

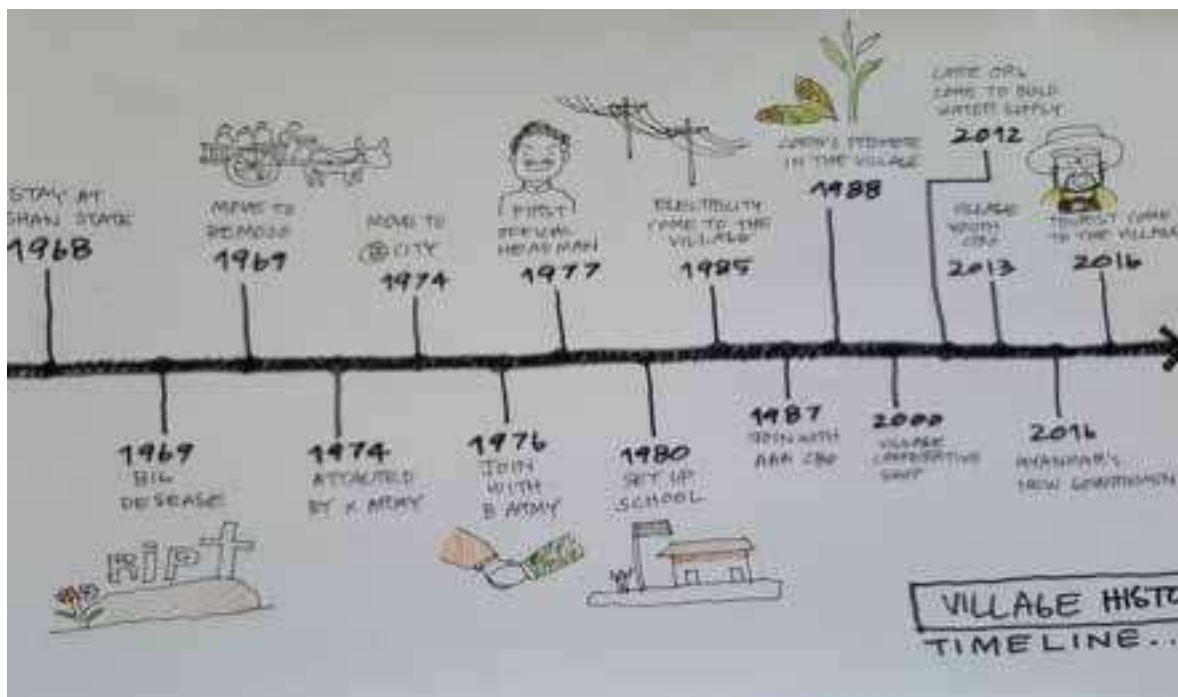
Facilitating questions:

- What happened? Was it positive or negative?
- What were the reasons for key changes?
- What would we like to maintain / conserve / restore / change?
- What aspects are possible to change?
- How could tourism / CBT help us to achieve these goals?

It is useful to separate timelines, and map different types of changes over time by theme. For example, environmental changes, socio-cultural changes, and economic changes.

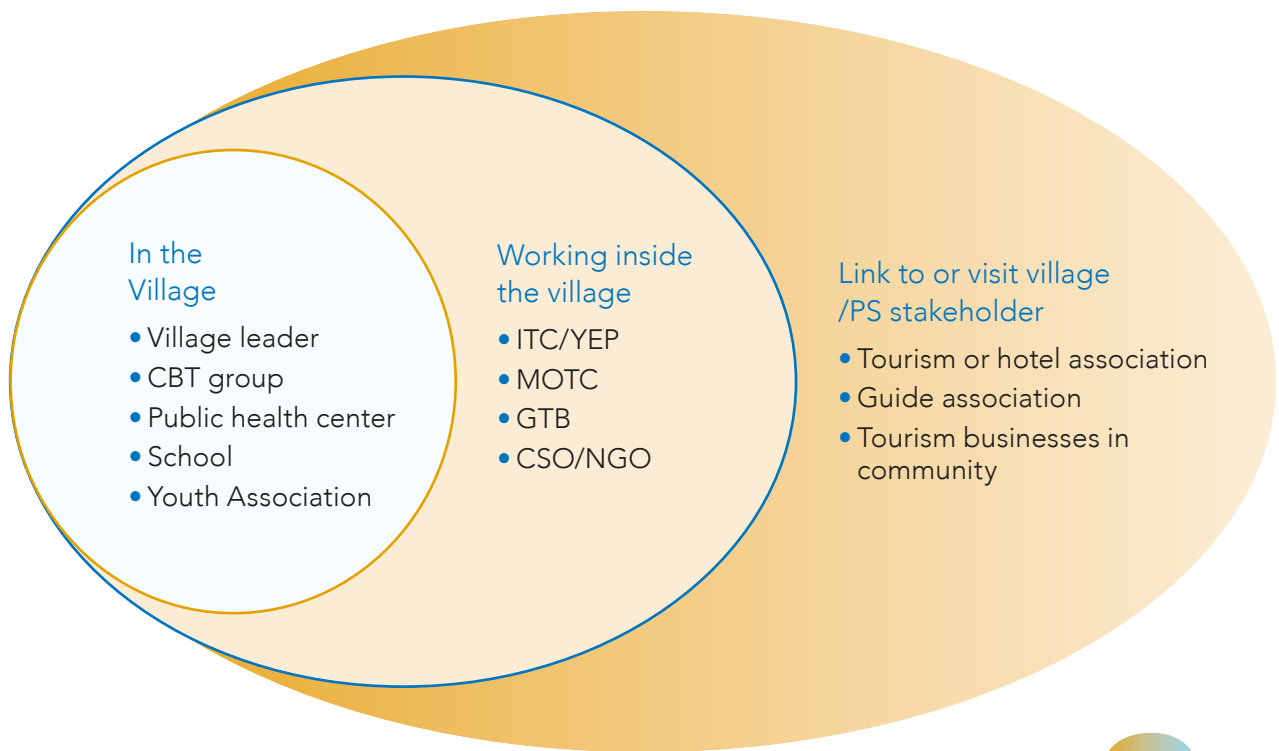
Different colours can be used to map different timelines. This helps to visualise, for example, when economic gains may have been at the expense of environmental losses. The facilitator helps the villagers to identify the causes of positive and negative trends. Why did forest cover increase or decrease? Why did village health improve or decline? Next, the villagers consider which aspects of their lives they wish to conserve or change. Finally, the facilitator helps the villagers to consider if tourism is the most suitable tool to reach their goals?

Information from history timelines can be used by tour guides to improve interpretation.



Stakeholder mapping is another useful tool, to identify which outside stakeholders will need to be consulted during the CBT development process. We can interview community leaders, and ask which outside organisations have a role or influence in the community, in areas such as governance, education, natural resource management, spiritual life, etc. Map these stakeholders by their importance, (influence over decisions in the community), and by their physical proximity. For example, if they are based at district, provincial, or national level.

Stakeholder map image here



Phase 2: Summarise findings



Collect this information in a team with local community members (e.g. with literate youth) and then work together to summarise the findings such as lessons learned, and identify key strengths and weaknesses (SWOT):

How to summarise the results of a community study?

The frame below will help you to collect and summarise the key results of the community study. The issues may need to be further adapted to the local situation.

Focus issue	What to summarise and present?
Highlights	Identify unique and / or special people, places or activities. Consider if and how these resources are different compared to competing communities / tourism products.
People and livelihoods:	Identify special skills, interesting occupations, agriculture, local crafts / products, arts and crafts, performance, potential for hands-on activities. Is there a warm welcome?
Culture	Identify attractive, living culture, history, faith, traditions, ceremonies, and festivals. Confirm social norms and taboos.
Nature	Identify attractive nature, scenic spots, viewpoints, potential for outdoor activities, indigenous knowledge of the environment, natural resources and land management.
Facilities	Identify level of facilities: running water, toilets, electricity, road conditions, tables and chairs, bedding, etc.
Management and cooperation	Identify formal and informal political and spiritual leaders; family / clan systems. Division of roles and responsibilities. Relationships between men and women / youth and seniors. Note examples of strong and weak cooperation. (Do community groups, savings groups, rice banks work?).
Sensitivity	Be alert for any history of illegal drugs, corruption and financial mismanagement, encroachment into protected areas, entrenched jealousy, or conflict.
Experience with tourists	Do tourists already visit the community? How do they arrive? (E.g. via ground handlers / licensed tour guides)?
External strengths and challenges	The trainer should also summarize feedback on external success factors: market potential, location, connectivity and frequency of travel services, road conditions, potential to connect the community with other tourist attractions; and potential for private / public sector partners.

Analyse the community study to predict potential positive and negative impacts

Take the results of the community study and analyse each category in terms of considerations, strengths and weaknesses. Suggested categories can include, for example:

1. Natural resources/environment
2. Culture and way of life
3. Local knowledge and wisdom
4. Facilities and experience with tourism
5. Community Organisation / Cooperation
6. Community Finances and Funds

The following table based on natural resources/environment provides an example of the kinds of questions which can be considered during the analysis of strengths and weaknesses:

What to consider	Strengths	Weaknesses
<ul style="list-style-type: none"> ■ Natural beauty? ■ How well preserved are natural resources? ■ Land management? ■ Conflict with PA's? ■ Indigenous natural resource management is being practiced by community members? ■ Serious pressures on the environment? 	<ul style="list-style-type: none"> ■ Beauty of forests, caves, streams, flowers, birds, etc. ■ Sustainable land management is being practiced and can be explained by the community members. E.g. disciplined rotation, zoning 	<ul style="list-style-type: none"> ■ Very fragile environment ■ Very little water ■ Not attractive: ■ Deforestation ■ Land ownership



Phase 3: Community Consultation Workshop

A community meeting should be held to share and check the information. Try to invite a variety of participants, including formal and informal leaders, youth, elders, men, and women. This will alert the team to contrasting / conflicting opinions, which may impact future activities. The facilitator helps community members to assess the Strengths, Weaknesses, Opportunities and Threats of developing tourism, and decide whether to continue developing CBT.

3

The workshop agenda and activities should cover the following:

Action 1: Brief Participants/Villagers:

Brief the village volunteers on the purpose of the study , the tools which were used and who participated

Action 2: Report the results and ask for feedback

Present the results of the community study by each tool. Ask for feedback (open class) or divide into small groups to brainstorm feedback and propose further information.

Action 3: Present key results of SWOT:

- Focusing on key strengths, weaknesses; opportunities, threats* (you may wish to omit certain details or chose to consult in private if certain issues are very sensitive).
-

Action 4: Confirm "Our Good Things"

We now build on the agreed results of the community study to identify potential tourism assets: people, places and activities which **community members feel proud and comfortable to consider developing into experiences and services for visitors** (tourism assets):

- After presenting the outcomes of the community study and discussing the strengths and weaknesses, the next step is to check if the community members are interested to move forward, and consider their potential for CBT experiences and services. If YES, then...
 - Brainstorm 'Our Good Things' which local people feel proud and comfortable to share with visitors by dividing into three groups: nature, culture and people. These 'raw materials' for tourism will be translated into real activities in the next steps.
 - Give each group a set of blank cards in a different colour:
 - » Each group must come up with as many ideas as they can think of in their category which they feel proud of in the community and would be comfortable to show visitors. Emphasise that if community members feel proud of something but feel uncomfortable to share this with visitors then they do not need to propose it.
 - » Write the ideas on the cards.
 - The CBT Facilitators will help discuss and display them.
 - Other groups may add more ideas.
-

Action 5: Summarise findings of workshop

Recommended topics to cover at the end of the workshop include:

- Review of the purpose of the community study and the results of the SWOT analysis: the key strengths, weaknesses, potentials and risks of developing CBT.
 - Consider if it is possible / feasible to overcome or manage the identified risks?
 - What aspects of local life do people at the meeting most want to conserve or improve?
 - Discussion: How can tourism be harnessed to support the community's goals / vision for the future, and contribute towards local community development goals?
 - Identify any red flags – issues which are such a risk that tourism should not be considered
 - Decision: Does the community wish to move forward with CBT?
-

Facilitation methods to use in the workshop:

1. Open floor discussions.
2. Peer group and small group discussions with presentations to the floor.
3. 'Ranking' games to prioritize the importance of specific ideas, goals, or actions. Diamond ranking is a useful tool:



Tool 7: Diamond Ranking

Diamond ranking:

1. Prepare flip chart, pens and at least 30 pieces of card (approximately A5 size)
2. Participants brainstorm ideas and write 1 idea per piece of card
3. Participants choose the 9 'best' or 'most important' ideas. Alternatively, the trainer provides a criteria for selecting 9 ideas
4. Participants prioritize the 9 ideas: 3 top priority, 3 medium priority, 3 low priority
5. Sticking the cards on a diamond is a visual way of confirming these priorities

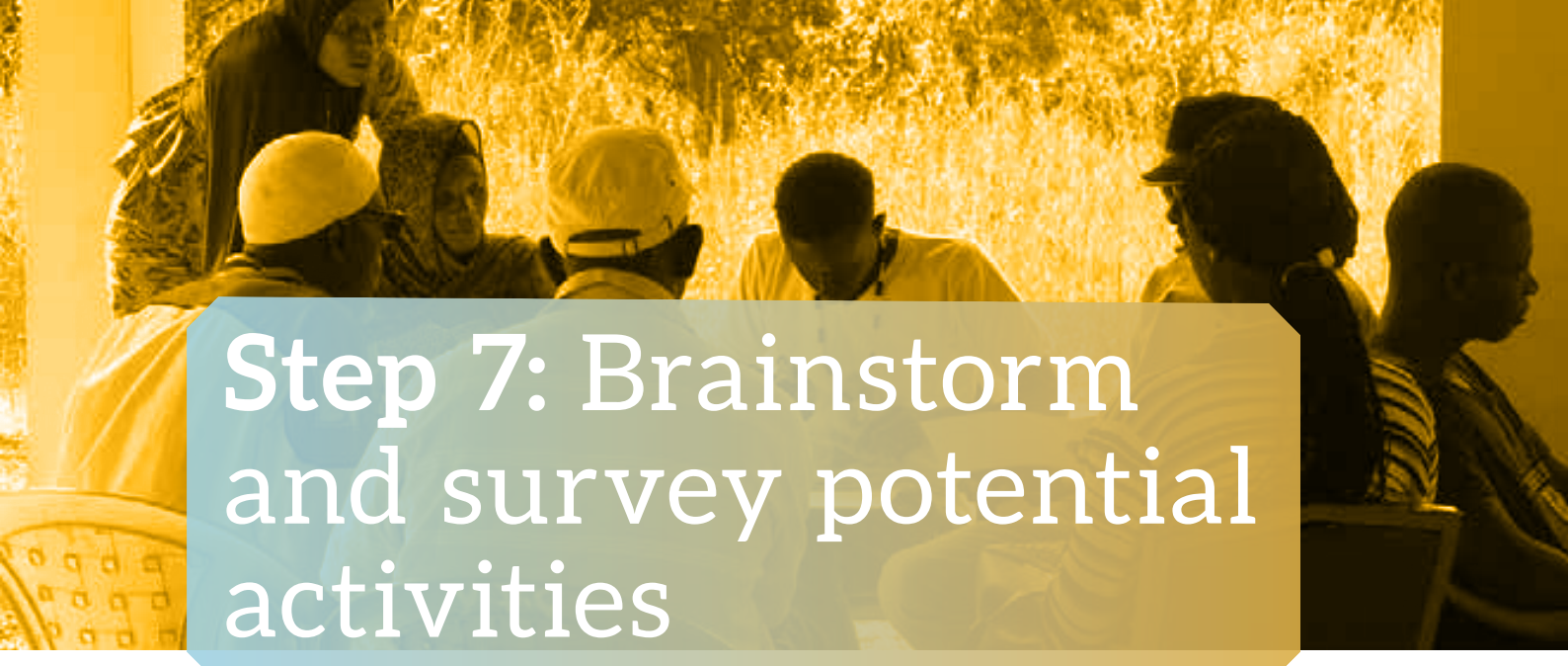


BE PREPARED



There is not always time to study all the issues discussed above. Key issues that we must assess are the community's human, cultural and natural tourism potential; the most serious community development needs; and how well people in the community work as a team. A good frame cannot replace active listening and observation of the real situation. The frame for the community study must be adapted if necessary, to include very important, local issues.





Step 7: Brainstorm and survey potential activities

WHAT'S THE ISSUE?

We now build on work done in the community study to [identify the most interesting people, places and activities, which local people feel proud and comfortable to share with guests.](#)

The community study has identified natural, cultural, and historic resources. Some of these 'raw materials' will have high potential to be developed into interesting, fun, safe activities for visitors, but others will not. This could be because either the activities do not have enough market potential, or because community members regard them as too sacred or too private.

You will help the community members by sharing ideas about how their 'raw materials' could be developed into an enjoyable product or experience for tourists. For example, visiting a sacred cave during a nature trek, or organizing a cooking workshop to learn a favourite local dish. These ideas become a 'long list' of potential CBT services and experiences.

Be aware that local people are used to their environment. They may not appreciate how difficult, slow, hot etc. tourists may find local terrain. To be sure of the true potential of an activity, it is often necessary to do further field surveys. For example, surveying a proposed river or trekking route to assess how scenic, long, steep, and safe a proposed route is.

Your expertise in tourism may help you to see opportunities for new products, which community members are not aware of. For example, you may see great potential for rock climbing or kayaking. You can propose these ideas. However, be mindful that any totally new activity, which is far removed from daily life, will require more training for community members, as well as potential investments in expensive equipment. So, please only propose these ideas if you have the necessary knowledge, funds and partners to support them.

Key content points:

1. The community study results are the 'raw materials' to be developed into interesting, fun, safe activities which local people feel proud and comfortable to share with guests. Your job as a trainer is to help give suggestions about how to do this.
2. Clarify demand for local experiences, but also emphasize that the community are free to decide not to share very private or sacred aspects of life with visitors, if they wish.
3. Review the importance of hands-on experiences and CBT as 'do, learn, feel, share'.
4. To be sure of the true potential of activities, you usually need to do a field survey.
5. The result of consultations is a list of interesting people, places and activities, which are presented as possible CBT experiences. E.g. not only 'river' but 'picnic by the river'.

IN THE FIELD

Brainstorming workshop



Coordinate with village leaders to organise a workshop. Be sure to invite community members who are interested to be active participants in CBT. At the start of the workshop, review why tourists are interested in local experiences. Also reemphasize that the community is free to decide not to share private or sacred aspects of life with visitors if they wish.

Review the outcomes of the community study: timelines, maps, etc and 'our good things' proposed during the previous step. Ideally, these are presented on large sheets of flip chart, so the participants can easily see the details, such as homes of important local people.

Key questions to ask during the workshop are:



1. Who could we meet? (People; Culture)
2. Where could we go? (Places; Nature)
3. What could we do? (Activities, food; People)
4. What are the most important people, places and activities in the community which visitors shouldn't miss?



After brainstorming this list of people, places, activities; **for each one consider:**

1. What can tourists do?
2. What can tourists learn?
3. What special feeling can one have in this place? During what time of day?
4. What experiences can visitors share with travel companions or local people?

Check:



Always double check that community members are comfortable to show something to visitors. Sometimes, community members will have different opinions. For example, a generation gap may exist between youth and elders between community members. Local people may not want to disappoint you or be too direct. Therefore, you need to be careful and gentle when you confer about this issue.

Field Surveys

Next, conduct a field survey with local volunteers to physically go and assess and view all of the people, places and activities that have been identified as potential experiences. This is because community members may have no experience in tourism, and misjudge how appropriate, safe, or interesting a place or activity is for tourists. This is why it is important to always conduct field surveys to double-check information.

CBT Facilitators must go with community members and do the actual activity in the field and while they are doing this, they must check on:

- Timing
- Activity levels
- Comfort (heat, toilets)
- Friendly and hospitable people to host
- Check if family members are also happy to host visitors
- Distances, times, and terrain between different attractions (for programme design)
- Any environmental or cultural sensitivities (how serious are they?)
- How many tourists can be welcomed in each site without putting unacceptable pressure on the environment, or disturbing local families / work / study, etc.
- Check to make sure that village artisans, musicians, etc. actually want to participate.
- Check what times of day are convenient, or would be too hot or uncomfortable, etc.



The facilitating team should keep your eyes open for any additional people, places or activities which community members may have overlooked, simply because these people, places or activities are so familiar to community members that they do not seem special. These familiar aspects of local life may actually be totally new, and very interesting or exciting to a visitor.



The next step is to check each proposed activity for 'red flags:' A red flag is a serious obstacle, which makes a potential activity highly unsuitable. These are the questions, which the trainer needs to ask to identify red flags:

Question to check for 'red flags'

Are there any serious safety issues or risks here which cannot be managed (e.g., too dangerous, too expensive, too difficult to manage)?

Are there any taboos / is anything forbidden for outsiders to do?

Is this place / activity too sacred or too private? Would it make community members uncomfortable if tourists visited?

Are there any times when it's not possible to visit this place or person? How often does this happen?

Do other groups have a stake in these resources? E.g. Protected Area managers, or neighbouring communities. Is there potential for conflict?

After brainstorming and field surveying, finalise a 'long list' of 7 – 15 potential CBT activities with community members. If you wish, you can use Diamond ranking to prioritise possible activities down to nine potential activities (see Tool 7).

Finally, review the results of the workshop and survey again and facilitate the community members to make a final decision about which places, people and activities will be proposed to discuss with tour operators in the next step of the process (step 8, shortlisting).

BE PREPARED

Different generations can have very different opinions about which aspects of culture are 'open to outsiders' and which are not. Try to ensure that senior elders and spiritual leaders attend the workshop, so that any objections can be brought to attention and discussed quickly.



Step 8: Shortlist high potential products

WHAT'S THE ISSUE?

You now have a list of people, places and activities. Next, you need to know which have most potential to develop into marketable tourism services and activities. What will sell? A good strategy is to organise meetings with national level tour operators – often known as Destination Management Companies or DMCs – to introduce your product ideas and request feedback on which of the draft ideas would be most attractive to their target markets?

The result of this consultation is a shortlist of high potential CBT products which community members feel proud and comfortable to offer, and tour operators feel confident to offer to their customers.

IN THE FIELD

Preparation

1. Identify national DMCs, with an interest in cultural tourism. To do this, search online or contact your national Tourism Associations, Tourism Ministries or specialist NGOs.
2. Visit the tour operators' websites and look closely at their profiles.
3. Short-list tour operators with high potential for example:
 - » Visiting your region or neighbouring regions
 - » Clear profile / interest in cultural tourism
 - » Clear focus on relevant markets (e.g. Europe, US)
 - » Sustainable / responsible tourism profile
 - » Customer feedback is a good match for CBT (the customers enjoy local experiences)
 - » Not too budget / low cost focused



1. Make a brief, colourful (1 – 2 page) overview of the possible products, with short descriptions and nice photos.
2. Design a clear and realistic schedule of meeting times.
3. Allow time for travel between meetings if necessary.
4. Contact the shortlisted tour operators at least one month in advance to request a meeting. Explain that the CBT products are not yet ready to sell. You would like to request a meeting to inform the tour operator about the new destination and to request their feedback on proposed product ideas. Attach the draft product overview.
5. Confirm place, time, and deadline for confirming meetings.
6. Prepare a brief, engaging presentation of ten minutes, introducing the potential CBT products and experiences.
7. Follow up invitations. Prioritize who you really want to meet.
8. Re-confirm with tour operator 48 hours before the meeting.



Delivery

Here are some guidelines for meeting with the DMCs:

1. You will make a better first impression by travelling to meet at the tour operators' offices, rather than asking them to meet you.
2. Introduce yourself. Thank the tour operator for their time.
3. Ask for more information about the tour operator, their target markets, and the types of tours which they specialize in. Do they sell your destination yet? Some questions to ask include:
 - » Who are their clients / partners? What kinds of services / activities do they like?
 - » What kinds of programmes do they buy now? What are the group sizes?

- » What kind of experiences are they (or their clients) looking for, but can't offer yet?
- » What different nationalities / ages do they sell to? What are the preferences of different nationalities and ages for activities, food, accommodation, etc.?
- » What are their clients' specific needs for service and safety standards?
- » What are their needs for languages / guides?
- » Are their clients interested in any particular themes? E.g. agriculture, history, food?
- » Are the draft CBT activities / services a good match for any of their target groups?
- » What could be improved / adjusted to make the draft ideas more attractive to specific target markets (e.g. shorter treks for seniors or families with children)?
- » How can we make the programme more attractive for their international partners?
- » What do they know about our destination? Where do they see potential?
- » Can they easily include our destination into their current programmes?
- » How could we make it easier for them to add our CBT products to their programme?
- » Don't forget to ask about demand from domestic and regional tourists. There are also many potential opportunities from domestic and regional tourists.

1. Introduce the 'long list' of potential products. Ask them to choose the top three product ideas which they think would be most interesting for their clients. Keep a record of these scores.
2. Listen to the tour operator and respond to their questions. You need to understand their style and markets, so you can recommend the most relevant products for their target markets.
3. Ask if the operators are interested to be kept up to date with progress? Request the email address of the most relevant staff members (product or operations manager). Agree any follow up.
4. At the end of the meetings, calculate which activities have the highest scores. Prioritise development of the top 3 to 5 services / experiences / activities.

After the meetings

1. Calculate which activities have the highest overall feedback scores.
2. Prioritise developing the top three to five CBT services / experiences.
3. Write emails to thank the tour operators for the meeting and report follow up on any agreements on 'immediate action.'
4. Report the outcomes of the meetings to community members.

BE PREPARED

This is a key step in the process of marketing your CBT programs. Asking for input from tour operators shows that you respect their opinions and care about developing a product which they will be able to sell to their guests. Following this meeting, you need to continue building trust with the tour operators, by sending them short updates on progress every 6-8 weeks. When you are ready to promote a final program and price, these meetings and updates will have set a strong foundation for future cooperation. Make sure to contact at least 10 tour operators, to ensure diverse opinions.

Step 9: Facilitate a Community Agreement



WHAT'S THE ISSUE?

By this point, your team has assessed and identified product and market potential for CBT in your target community. You feel confident that the community has a real opportunity to develop and sell a good quality CBT programme. Supporting businesses or organisations will now need to invest significant time and funds to train community members in management and service roles, to get the new CBT products and services up and running.

Community members need to understand that developing CBT requires a serious commitment of resources, effort, work and time. CBT will only succeed with the community's active commitment to developing CBT. We formalise the community's commitment to this process through a community agreement. Your job, as a CBT trainer, will be to plan and facilitate this process.

The objectives of facilitating a community agreement are that:

- Local community members who wish to join CBT activities will make a formal commitment to participate in CBT capacity building activities.
- Village leaders and important external stakeholder organisations – such as government or NGOs, will witness and support the agreement.

Before organising the agreement, you need to know:

1. Exactly which government, private sector and civil society stakeholders have a role in tourism, safety / security, nature conservation community development at community, district, and state level
2. Which community members want to participate actively in CBT.
3. If there are any serious concerns, misunderstandings, or conflicts among local leaders / community members about CBT.
4. All steps taken so far in the CBT development process.

Two different groups of people sign the community agreement:



■ **Signatories:** these are:

1. active community members who want to participate in CBT
2. village leaders
3. lead partner organisation

■ **Witnesses:** These are:

1. other important community institutions (e.g. the temple or school)
2. external organisations working in the community with a tourism or community development role
3. important private sector organisations such as tourism associations

The community agreement requires understanding and buy-in from influential internal and external stakeholders. A small number of highly active community members will not be sufficient to ensure a solid community agreement.

Therefore, the process will only work if you have spent enough time meeting and discussing the purpose, process and commitments of the community agreement with influential stakeholders, inside and outside the community.

IN THE FIELD



To succeed, individual community members will need to be available for training, and later to offer services during CBT tours. This requires a commitment by community members. One way to emphasise that this is a serious commitment is to introduce a simple, formal community agreement, which is signed by community leaders/members and the project.

How to prepare and facilitate a community agreement

You will work with the active community members to prepare and run a meeting to update the whole community and external stakeholders about the progress of CBT, and to outline the next steps. Signatories and witnesses will sign the Community Agreement at this event.



These guidelines will help to prepare and facilitate the agreement:

- Draft a very simple community agreement format, for signatories and witnesses, so that they understand the details of the agreement. The core commitment that active community members agree to join trainings consistently. This commitment is signed and witnessed.
- Next, update and consult with village leaders about the community agreement process. Ask them to recommend which internal and external organisations should sign the agreement as witnesses.
- Meet or call these internal and external organisations, to review the work done so far in CBT, explain the purpose of the community agreement and invite them to join the event and sign the agreement.
- Prepare a simple vinyl, illustrating the main steps which have been taken to develop CBT so far, and outlining the main future steps.
- Coach active community members who have joined past CBT activities to present the past steps and future actions to the whole community, during the Community Agreement event. Provide feedback, to help the community members to present clearly and confidently.

Community Agreement Signing Event

The programme for a community agreement signing event should include the following:

- Community members arrive.
- Welcome / introductions as necessary.
- CBT members present the past and future steps of CBT development. Allow sufficient time for Q&A, to address any questions or concerns.

- Community members who wish to participate actively in CBT sign the Community Agreement as Signatories.
- Community leaders and core partners (providing funds / resources) also sign as Signatories.
- Important internal and external stakeholders sign as witnesses.

Tool 8: CBT member registration form

Name (Mr./Mrs./Miss)

Address

Telephone

Date of Birth

I confirm that I wish to register to join the following CBT service provider groups:

Guide Food Workshop..... Other.....

I agree to:

- Freely invest time to join ITC training activities, except in the case of emergency.
- Work to the best of my ability to develop safe, enjoyable tour programmes for visitors.
- Communicate openly with CBT group in the case of any challenges and cooperate to find solutions.

I have been informed of and understand the aims of CBT development in the community.

Signature Date



Tool 9: Community Agreement Co-Signatory (for village leaders and lead partner organisation)

Date..... Location:.....

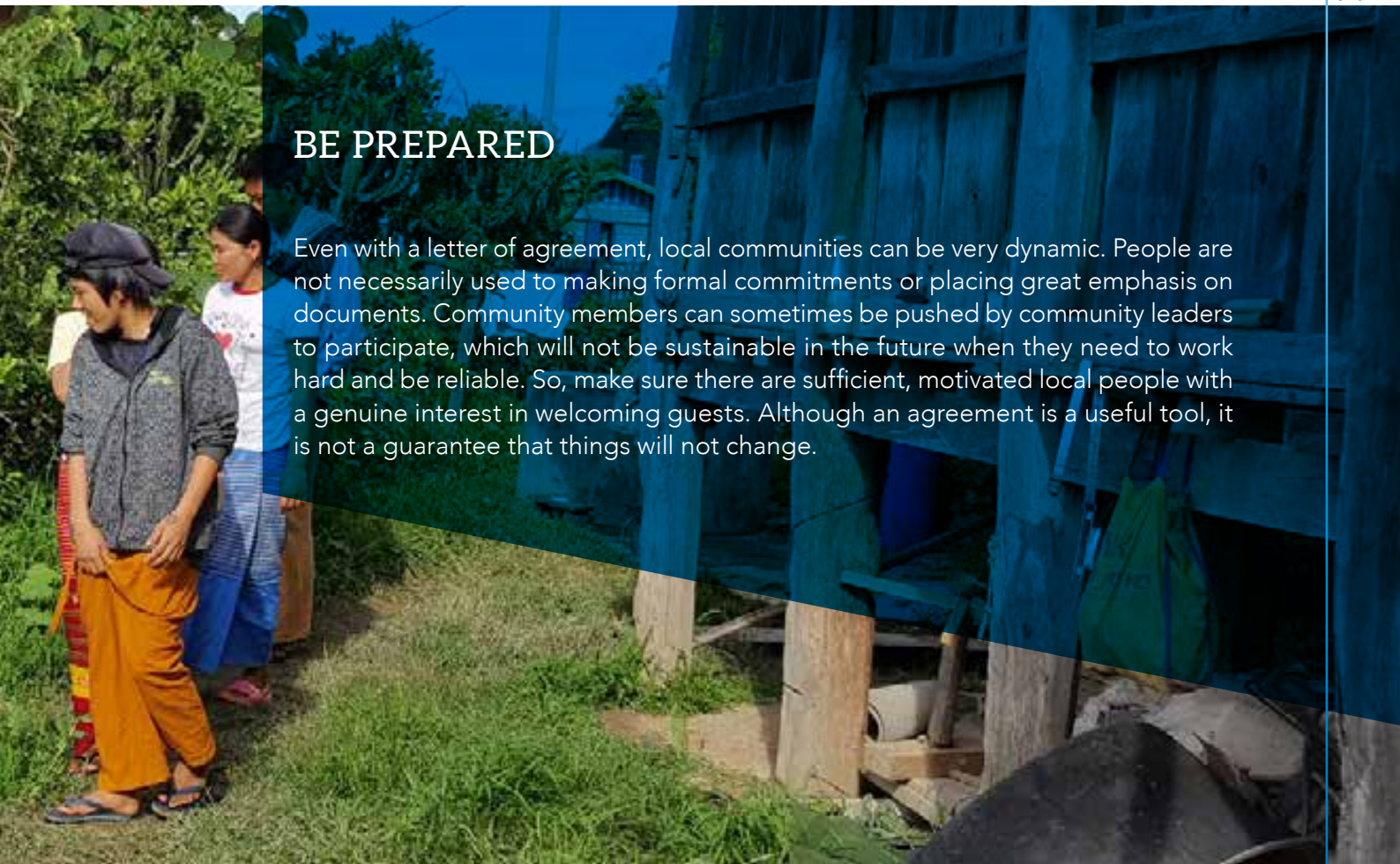
- I confirm that I have been informed of and understand the aims of CBT development in..... Community.
- I bear witness to the commitment made by community leaders and community members in community to develop Community Based Tourism.
- I agree to work closely with community members, partner and supporting organisations to support successful CBT development.

In my role as (job title).....on behalf of (name of organisation),

Name..... Signature.....

In my role as (job title).....on behalf of (name of organisation),

Name..... Signature.....



BE PREPARED

Even with a letter of agreement, local communities can be very dynamic. People are not necessarily used to making formal commitments or placing great emphasis on documents. Community members can sometimes be pushed by community leaders to participate, which will not be sustainable in the future when they need to work hard and be reliable. So, make sure there are sufficient, motivated local people with a genuine interest in welcoming guests. Although an agreement is a useful tool, it is not a guarantee that things will not change.

Step 10: Facilitate a CBT vision and objectives



WHAT'S THE ISSUE?

By now, a team of at least 15 – 20 community members have made a firm commitment to join future trainings and bring the CBT programme to life!

In practice, different local people will have their own visions for the future, and their own priorities and objectives for developing CBT. The process of reaching consensus on a vision and objectives for CBT enables community members to prioritise their ideas and needs, while remaining aware of the potential positive and negative impacts which tourism can create for a community.

CBT aims to contribute towards sustainable development and sustainable tourism. This means developing local experiences which have positive impacts on the local economy, society, culture and environment.

The final vision and objectives may give more weight to economic, or cultural, or environmental goals. However, all these aspects should be considered and included during the process. If there is no aim to protect the environment, then it is unlikely that either positive or negative impacts will be monitored.

IN THE FIELD

Vision setting workshop



A workshop with the community will be the vehicle to work to facilitate the development of a vision and objectives for the CBT in the village. Objectives should be to integrate and balance local priorities and sustainability.

Facilitating this process requires care. We must respect local priorities and perspectives. It is also our job to alert community members to potential blind-spots so that the mix of objectives can contribute towards sustainability. This can be done through a simple, participatory process.

Help community members to prioritise their ideas and needs, while remaining aware of the potential positive and negative impacts which tourism can create for a community.

Ensure that all of the pillars of sustainability are considered.

Prepare for the session:

- Prepare materials for the activity: flip chart, pens, sticky tape

Workshopping

- Review the CBT steps so far with community members.
- Explain the value of a vision: if we know our destination then we can check that we are staying on track. You can use a map to the peak of a mountain to illustrate this.
- Community members work on their own to draw a vision of the tourism future which they would like to see in their communities.
- Community members explain and compare their individual visions in small groups (4-8 people), and work to draw an inclusive vision.
- Small groups present their visions, and core ideas are drawn out.

Consolidation:

- The core ideas are proposed as a shared vision (open discussion with possible voting).
- The vision is considered against the pillars of sustainability, and community can propose adjustments to the wording.
- Voting or prioritizing games can be used to help reach consensus.
- Based on the vision, community members then propose 2-5 objectives.





BE PREPARED

It is a big advantage if the vision and objectives of the CBT Group are compatible with existing plans to develop tourism and other activities in the local community. If local political and spiritual leaders are not participating directly in CBT, make sure to meet them before organising a visioning session, to understand what plans have already been made or are in the pipeline. These meetings will help you to support the CBT Club to define a vision and objectives, which can complement existing plans. If existing plans are likely to have serious negative impacts on local people and the environment, then you can devise a strategy to create more awareness and buy in about the importance of sustainability with local leaders.

SUMMARY ACTION POINTS: 'C' CONCEIVE

1. Conduct a community study

- A community study assesses strengths and weaknesses before developing CBT.
- The outputs of the community study are used to SWOT tourism and human potentials.
- Tools include interviews, walks, internal and external maps, calendars, timelines.
- Hold a community meeting to check / review results and the potential for CBT.

2. Brainstorm potential experiences and services

- Community members brainstorm special aspects of local life, culture, nature and people which the community feel proud and comfortable to share with visitors.
- Highlights: people / places / activities. What can tourists *Do, Learn, Feel, Share*?
- Check carefully for red flags. What places / people / activities are off limits to tourists?
- Define a 'long list' of places /activities / people with potential for a CBT programme.





3. Shortlist marketable opportunities

- Consult with tour operators / DMCs to request feedback on potential CBT products.
- Ask about DMCs profile, trip styles, key target markets, product development needs.
- Ask which long-listed ideas would be most attractive to clients or meet a need / gap?
- Ask the DMCs to score the ideas on your long list. Use the scores to define a short-list.

4. Facilitate a community agreement

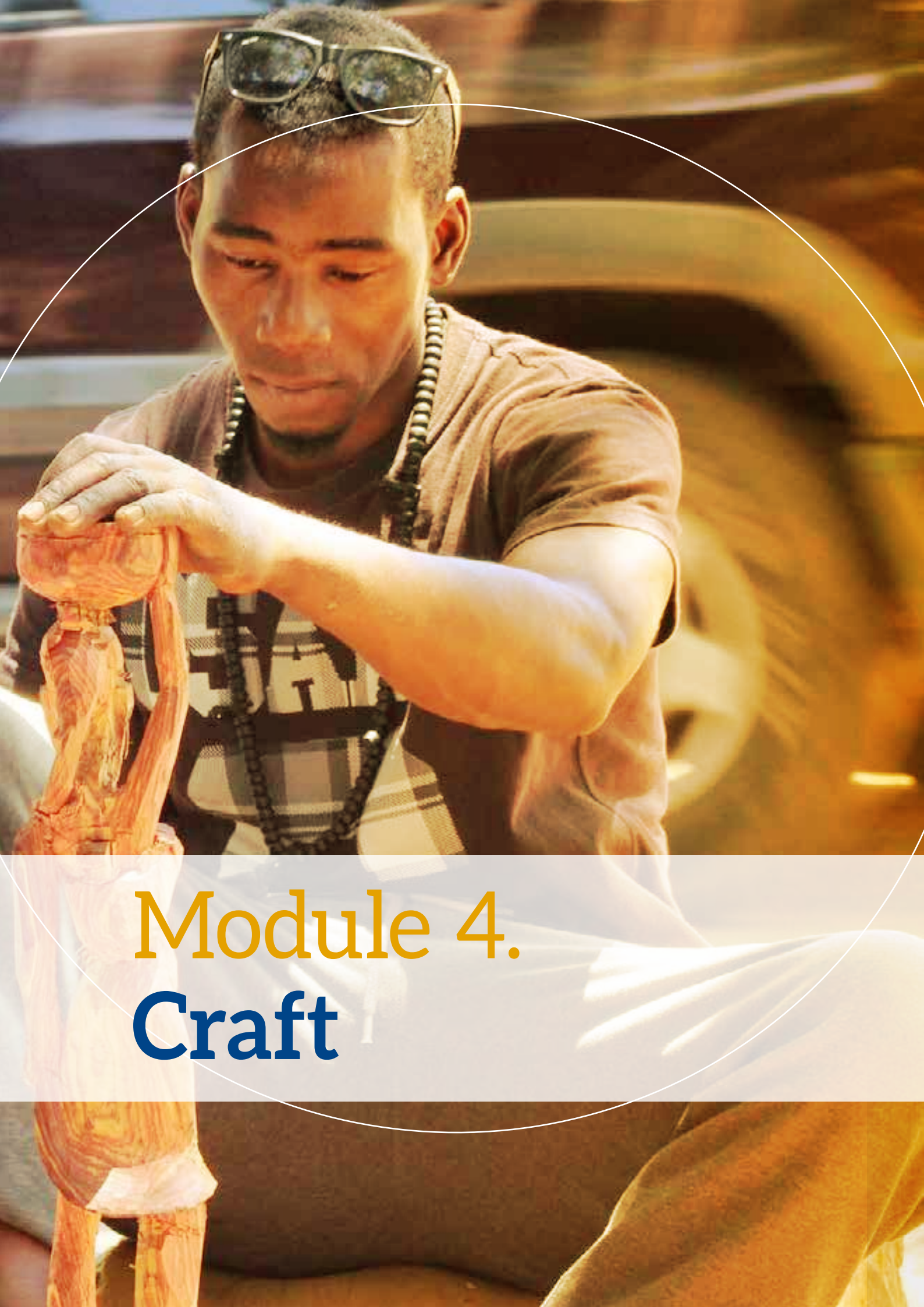
- Explain to community members that the next steps require significant commitment.
- Community members will need to commit to attending several months of training. It is important that the same community members consistently attend trainings.
- Develop a simple, formal community agreement, to be signed by community leaders.
- Give the community members enough time and a deadline to return the agreement.

5. Facilitate a vision and objectives

- A vision and objectives provides a common understanding of the 'why' of CBT.
- The community will have a reference point to assess if tourism is developing positively.
- Community members brainstorm their ideas individually and then reach a consensus.
- The facilitator helps alert community members about the pillars of sustainable tourism.







Module 4.
Craft



Craft consists of the following steps:



Craft

“Skill in making things by hand...skills involved in carrying out one’s work....”

(Oxford Living Dictionary)

In the previous modules, we learned how to identify a suitable destination for CBT development, build trust with local community members, raise awareness, and assess product and market potentials for CBT. After confirming these potentials, community members can make an informed decision to go ahead, which can be formalised in the Community Agreement. This module focuses on the next steps of establishing CBT services and management, plus building the capacity of CBT service providers to do a great job. In this module, we are ‘crafting’ CBT.

By the time you have completed this module, you will be able to:



Step 11: Design an attractive CBT programme

WHAT'S THE ISSUE?



Through the community study, field surveys and meetings with tour operators, CBT trainers and community members have identified which local people, places and activities have high potential to develop into marketable CBT experiences. Community members have also drafted a vision and objectives to guide their CBT programme and activities.

Next, the community members need to weave their 'raw materials' of high-potential people, places and activities into a small number of pilot programmes.

Based on the communities', tourists and business partners' experiences with the pilot programme, additional CBT programmes can be developed in the future.

The length of these pilot programmes will depend on market demand. Initially a half day and full day programme are good places to start. If a community offers accommodation, then either a 2 Day 1 Night, or 3 Day 2 Night programme are good places to start. In the future, longer programmes may be possible. For example, some CBT communities have successfully developed CBT programmes of between a week and one month long for students and academic conducting field research and community service programmes.



IN THE FIELD

Let's start by learning some key principles of CBT product development.

What are the principles of CBT product development?



CBT tours can be as short as a couple of hours, or up to a week or more. There are many things to consider, which will influence the best ways to weave the community's special people, places and activities into a good tour.



→ **The first thing to consider** are your main target markets. The more you know about the tourists who are most likely to go on the tour, the easier it will be to decide how to select and package activities into a programme.

Think carefully: what range of ages do you expect to welcome? From which countries? Do you know if your target tourists have any special interests such as hiking, food or textiles? Do you expect to welcome mainly young and adventurous backpackers, or senior travellers interested in history, or families with children who have a short attention span and love to be entertained? Are your target visitors more interested in day trips or overnight stays?

If you are not sure, find out more about the tourists who already enjoy visiting your area.

Is the area close to your community famous for mountains and forests, beaches and leisure, or culture and history? What kinds of activities and programme are likely to attract people who already visit nearby?

→ **The second thing to consider** is whether you should develop a general tour, including a range of different kinds of cultural and natural highlights, or if it would be better to develop a special, themed tour, focusing on a particular aspect of life in the community, such as food, festivals, or forest trekking.

When you have a clear idea about your target tourists and their expectations, you can go into the details of planning what the CBT programme needs to include, how it needs to be designed, and what training will be required.



Here are some key success criteria for designing a great CBT programme:

1. Include enjoyable and unusual highlights, based on what your target tourists will enjoy. These are very special people, activities or places.
2. Tourists are looking for a hands-on experience. They want to meet local people, and use all 5 senses: touch, taste, sight, sound and smell.
3. Tourists usually enjoy the chance to learn something from local people. This could be through storytelling, observing or having a go!
4. Safety is essential: identify all risks and consider how they can be avoided or managed. If you are unsure about levels of risk, always go back for a second look. Think about seasonal dangers like flooding. If an activity is too dangerous, do not include it in the CBT programme.
5. The final programme cannot be too expensive. Don't try to include everything. Cultural activities which require the whole community to participate, or need expensive preparation are probably not suitable.
6. Find a suitable, attractive place to welcome visitors, with enough space to sit comfortably, shelter from bad weather, and use a toilet.
7. The 'flow' or sequence of activities is very important. Start your tour somewhere with symbolic importance, like a temple or a historic site, where you can introduce the community's history and way of life. Then move on to explore domestic life. Don't try to fit in too much. Allow people some time to relax, especially towards the end of the tour.
8. Think carefully about timing: the best time of day and how long to do activities. Avoid strenuous exercise during the hottest time of day.
9. When you are designing a route, make sure to consider where and approximately what time visitors can eat, drink and take a toilet stop.
10. Consider how the seasons will affect your programme. For example, if certain activities will be impossible due to high water, landslides, etc.

Introducing the five senses in tourism

You will need to help community members to recognize and use the five senses when they design a CBT tour. These senses are taste, touch, sight, sound and smell. We can also add sensual value to the tour by using our imagination.

For example, the guide can describe how an old battleground, or an abandoned settlement would have looked, sounded and smelled in the past.

CBT Design Workshop

The objective of a CBT Design Workshop is to guide community members through different processes and activities to support them to design an attractive CBT programme.



Tool 10: CBT Design Workshop Processes

CBT Design Workshop Process

Preparation



1. Organise a workshop to design one or two pilot programmes.
2. Prepare five different coloured cards of approximately A5 size, and flip chart paper. Prepare at least 20 cards of each colour.
3. Prepare a big table, on a piece of flipchart or white board, with the titles 'time', 'activity', 'where?', 'who?' and 'prepare?' along the top of the table (the horizontal axis of the table).

Useful media for the workshop:



1. Presentations or flipcharts to introduce success factors for CBT programme design.
2. Videos or photos to illustrate the five senses.
3. Flipchart, cards, tape and coloured pens to brainstorm and draft the programme.

Delivery: how to run the workshop?



1. Remind the community members of the most popular product ideas from the shortlisting meetings with tour operators.
2. Review what you already know about potential tourists: age ranges, nationalities, interests, average length of stay, etc. What activities would they enjoy?
3. Review the differences between a general and themed programme and decide which kind of programme you will help the community members to design.
4. Review the list of success factors for CBT programme design and the five senses. Ask the community members to suggest examples of the five senses.
5. Clarify what needs to be included in a CBT programme: tour activities, times, locations and responsible people. Plus if any special preparation is needed

Process 1: Identify Activities

1. Ask the community members to write down each potential CBT activity on a large piece of card. Be careful to only write one activity per one piece of card. E.g.: 'meet the local weaver', 'eat a picnic by the river,' 'go for a swim.'
2. Ask the community members to design a CBT programme by combining these activities in a way which follows the key success criteria. Ask community members to stick the CBT activity cards on the table, in the best order.

Process 2: Location:

- Next, community members should write the location where each activity will take place on a separate card, and stick this location card next to the activity card, under the 'Where?' column of the table



Process 3: Time

1. Next, community members should consider how much time tourists will need to spend doing each activity, how long it will take to travel between activities; and how much free / relaxing time is needed.
2. Community members should write the times when activities will start and end. Stick these cards in the 'Time' column, next to each activity. Also, add enough time for travel and rest between activities, on new cards.

Process 4: Who is involved in each activity

1. Community members should also identify and write who needs to be involved in each activity on a separate card, and stick it next to each activity card, under the 'Who?' column of the table.
2. When the community members have finished, the facilitator reviews the draft programme, considering the choice, timing, and sequence / flow of activities.





Process 5: Review, Feedback, Revision

1. Give feedback on their draft programme. Check that it includes highlights and compare the programme with each of the key success criteria. Consider if the programme suits potential markets for the area.
2. Make specific recommendations. For example, recommend making some activities longer or shorter, to swap activities to more suitable times of day, or to completely remove activities if there is not sufficient time. It is important that tourists have enough time to rest and relax, too.
3. Community members improve their programme, based on your feedback.

After the CBT Design Workshop

1. Make a simple photo and text presentation of the draft CBT programme, for example a word document or PowerPoint.
2. When the programme is agreed, produce a nicely designed village map for the local community tour guides to introduce the programme and flow of activities during the welcome meeting.



BE PREPARED

Seasons have a huge impact on program design. During April, a river may be easy and safe to cross during a nature trek. During November, the same river may turn into raging rapids in which one could easily drown. A local waterfall may be cool and perfect for swimming in the winter season but reduced to a small trickle of water during the hot season. Make sure that you discuss carefully with local people about how the seasons effect landscape and risks, so you can either decide to only offer certain activities during certain months of the year, or choose alternative activities so that you can promote the same program for more months per year.

Step 12: Build capacity & systems to manage CBT



WHAT'S THE ISSUE?

By this point in the process, the community understand that it will require time and effort to develop CBT. They have drafted a vision and objectives for CBT. They have developed a pilot tour, so they can also foresee who will be involved in delivering CBT. Now it is time to discuss and clarify roles and responsibilities, and how CBT will be managed.

There are a number of management tasks in CBT, and the community needs to have an understanding on these in order to put the right structure in place to handle these. There are three main management tasks:

→ 1. Bookings:

1. Inform tourists and tour operators about CBT programmes and prices.
2. Take and record CBT tour bookings.
3. Inform CBT service providers about CBT bookings.
4. Reconfirm CBT tour bookings with partners.
5. Reconfirm CBT tour bookings with CBT service providers.



→ 2. Delivering the CBT experience:

1. Meet and welcome important visitors to the community.
2. Backstop CBT operation as necessary.
3. Make up a bill for customers based on the CBT tour costs.
4. Collect money and provide a receipt for customers.



3. Financial Management:

1. Record details of all income and expenses in the cash book.
2. Pay the CBT service providers, contributions to the Community Fund.
3. Summarise accounts and deposit cash savings in the bank.
4. Organise and record monthly meetings for CBT Club members.
5. Monitor positive and negative impacts of CBT.
6. Organise monthly CBT group meetings, and an annual reporting and feedback meeting with village leaders and other community members.



A team needs to be established to handle all these tasks and sub-tasks. Community service providers need to be active, reliable and clear about their roles and responsibilities. This is supported by establishing a CBT Group and possibly also a CBT Advisory Committee.

The **Advisory Committee** (if there is one) has senior people who can help to mobilise support for CBT. It could be for example, six to eight people, including one or two village elders, a local spiritual leader, a teacher, a senior MOT officer, a respected Tourism Association person etc.

Each CBT Group needs at least one **CBT Coordinator**. This is a contact person for tourists, tour guides and tour operators to make enquiries and bookings. The coordinator also manages the booking schedule, informs service providers in advance about tours and manages payments. CBT management roles include an **accountant** and a **treasurer**, who should be different people. This means that paying and receiving money and accounting for money are kept separate. Some communities also have a senior chairman or advisory committee to help mobilize support inside and outside the community.

The most important management systems which need to be established are **communication**, (usually phone or email) **information** and **promotion**. This requires clear CBT programmes and prices, a bookings system, an accounting system, a functioning Community Fund and a schedule for regular meetings.



Who's involved? Matching CBT management roles and responsibilities

Different communities will choose different types of management structure. One person may hold more than one role, except for being both accountant and treasurer. Here is a summary of each person's responsibilities:

The CBT Group:

#	Group member	Role/Responsibility
1	Advisory committee	This senior person may be a community member, or a trusted outsider with good connections to stakeholders inside and outside the community. They are responsible for linking the CBT group to stakeholders; monitoring that the community fund is being well managed; and helping to solve serious problems.
2	Chairman	This leader helps to facilitate CBT group meetings and to resolve disagreements among members. He or she represents the CBT Club at community meetings, other public meetings and events.
4	Treasurer	This person is responsible for receiving money from tour guides and tourists. S/he writes and provides them with a receipt.
5	Accountant	This person is responsible for recording income and payments in the accounts cash book. They summarise the CBT accounts each month and CBT community fund accounts every 3 months.
3	Coordinator	This person responds to and follows up enquiries about CBT; record and follow up bookings by tourists / guides / tour operators; manage the job queue and inform service providers of bookings. They run regular monthly CBT group meetings.
7	CBT members	These community members attend training when requested, prepare in advance for each tour and are reliable. They also contribute 10% of their income to the CBT Community Fund.
6	Service provider group leader	This leader attends monthly meetings, listens to feedback about CBT services and works to improve group services. S/he explains service providers' concerns to the CBT coordinator.
8	Community Guide	These community members interpret important places, people and activities and manage safety during the tour. They also ensure tourists' have food and water, rest and toilet breaks.
9	Cooking group	These community members prepare food and drinks and introduce menus to tourists. They clean cooking areas and keep kitchens and equipment hygienic before and during CBT tours.
10	Artisan / resource person	These community members the prepare necessary equipment for a fun, hands on experience at home. They wait at home, or an agreed meeting place, to show their special skills to visitors.

Note that it is not necessary to have all of these roles. These are examples of common roles. E.g. the chairman may be a highly respected local person who doesn't have time to be involved in day to day activities, so then there would be an additional coordinator. However, in most cases, there will only be one coordinator.

The trainer can present the roles and responsibilities above to the community members; or play a game where the community members must match the roles and responsibilities. The trainer should ask the community members what **knowledge** (head), **skills** (hand) and **attitudes** (heart) are needed for each role. Based on this, community members will be able to identify the best people for the job.

The key areas of management are:

A CBT Club/Group

1

**A CBT
Coordinator and
communications
system**

2

**Service providers
with clear roles
and the skills to do
them**

3

**CBT Bookings and
Accounts system**

4

Community Fund

5

**Monitoring of
positive and
negative impacts**

6



IN THE FIELD



This section of the manual covers how to establish key elements of CBT management.

A key question is “Why should community members work as a group to manage CBT?” The facilitator should ask community members to consider and discuss this question. E.g.:

- CBT aims to create benefits for individuals, families and the broader community.
- Successful community development and nature conservation require teamwork.
- It is easier to manage negative impacts of tourism if people plan and work together.
- ‘Community Based Tourism’ implies that it is representing the whole community.
- For the first few years, rural, farming communities will have little experience in tourism.
- It will be helpful for local people to work and gain experience as a team.



How about supporting local entrepreneurs?

As community members develop experience welcoming tourists, individuals may wish to establish their own, private, tourism related small businesses, such as restaurants, coffee shops, or accommodations. This can be managed by developing the

CBT Club into an association. The members continue to meet regularly to discuss and plan tourism development, and contribute in cash / kind towards community and environmental initiatives.

Workshop to establish a CBT Club or Group

Invite local community members to discuss how natural and cultural resources, people, work and money will need to be managed, if they decide to develop a CBT programme.

The recommended steps to establish a CBT Club / Group are as follows:

Action 1: Invitation

- Invite active community members, who signed the Community Agreement, and committed to participate in CBT to discuss how natural and cultural resources, people, work and money will be managed.

Action 2: Introduction

- Review the vision and goals of CBT.
- Review the draft CBT programme.
- Introduce the key management tasks.
- Briefly introduce the supporting systems which will be developed later.

Action 3: Roles & Responsibilities: Explain

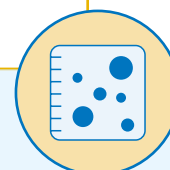
- Introduce the list of roles and responsibilities.
- Consider which skills, knowledge, attitudes are needed for each role.
- Emphasise that there should be at least 2 people with management responsibility (to ensure separation of accounting and treasurer roles).
- Emphasise that management roles will require time and effort, and managers are unlikely to receive income until tourists start to arrive.
- Group management requires people who have the following qualities:
 - » Active leadership by example.
 - » Volunteer spirit: prepared to give time for meetings, trainings, and assisting others.
 - » Sense of responsibility and reliability for work which they have taken on.
 - » Ask villagers to propose and vote for people to take management roles.
 - » Check that nominated people are happy to accept the responsibility.

*One person may take on more than one role.



Action 4: Club Goals and Operational Rules

- Discuss and agree:
 - » Goals of CBT Club
 - » Rules and regulations for the CBT Club
- CBT goals need to be based on local needs, or they will not be able to motivate action
- Discuss, agree, and record the tasks, responsibilities and expectations of each job role



Media and materials you will need to run these sessions:

1. Flip chart, cards, tape and coloured pens to brainstorm and use for assignments
2. List of management tasks for the exercise
3. Sheet of the CBT roles and responsibilities for each role (this can be presented through a True / False exercise)
4. Flip chart for the community members to brainstorm the knowledge (head), skills (hand) and attitudes (heart) which are needed for each role
5. Examples of Booking sheet, Receipt, Cash book and case study for the exercises



Management systems and tools

Essential management tool

Explain that there are six CBT management systems which need to be established:

- Communication (phone and email).
- Information and promotion.
- Bookings can be managed using a simple bookings system.
- Financial transparency requires a simple accounting system.
- A Community Fund can increase community benefits and ensure good relations between CBT Club members and the broader community.
- Challenges can be identified and solved by regular meetings.



Booking System

A **booking system** helps the CBT club to plan and prepare services and staff such as food, local homes, transport, and community guides. A booking system also helps supporting organisations to foresee when the community will reach maximum capacity, and plan when to develop new products and destinations, based on the number of visitors. If the community receives many advanced bookings (e.g. series bookings from tour operators), additional training for additional local tour guides, food providers, etc. can be organised well in advance.

Additional information can be included in the booking system, such the **types of tourists** and **booking channels**. This can help supporting organisations (e.g. government and NGOs) to develop new products based on the interests of important markets. E.g. programmes for families, students or volunteers. A **queue or rotation** system for service providers can also help the coordinator to spread opportunities and benefits between community members.

Bookings system: to record bookings and know your top customers and partners

Below are some suggested types of information to collect when taking bookings:

1. Date of booking and time of arrival
2. Number of tourists
3. Half day or full day tour
4. Activities and services (e.g. local guide, lunch, trekking, artisan home visit)
5. Type of tourists (e.g. general, student, volunteer, club or society, professional on study tour, company team building. Solo traveller, couple, family, senior)
6. Booking channel (e.g. tour operator, regional guide, school, company, other)
7. Contact person / telephone number of guide or tour leader
8. Any special needs? (e.g. vegetarian, no pork, low level of fitness)

Tool 11: Booking form

CBT

No.	Date	Arrival Time	Tourist info				Go with whom				Community Guide		Welcoming By Alkalo	Fullani Riti Tradition Instrument	Women Organic Garden	other	Workshop or activity with the local expert			Contact person	Tel.
			No. of tourists	Type	Nationality	Food Allergic	TOs	Professional guide	School/university	Other	Half Day	Whole Day					Skill center	Rice Pudding	Wood carving		
1	1.2.19	09.00	6	Senior	UK	None	Fair Play					/	/	/	/		/	/	/	Dave	9245779
2	3.2.19	08.00	8	Student	USA	Peanut 1		Isatou				/	/	/	/		/	/	/	Isatou	3892428
3	10.2.19	10.00	2	Couple	NL	None	Arch					/	/	/	/		/	/	/	Lamin	9876541
4	15.2.19	14.00	20	Study Tour	Germany	Peanut 2															



Accounting System

A solid **accounting system** is an essential foundation for responsibility, transparency and ownership. Not keeping accounts is a recipe for failure. Accounts show exactly how funds are received and used, which can prevent misunderstandings and conflicts over money. Accounts enable CBT Club members and supporting organisations to compare expenses against income, calculate profit, and make informed decisions about when to increase prices.

However, it is also essential to recognise that rural farmers may have no experience managing money systematically. They may never have had a bank account. Therefore, the accounts systems need to be as simple as possible.

Lesson learned: During the ITC project in Myanmar, the ITC team had to simplify our own systems several times until it was simple enough to be managed at village level. The ITC team finally set the following systems in place:

Receipts book, containing:

1. Unit price x Quantity of Units = Total Amount
2. Units = Total Amount
3. Signed by the person who receives money
4. Make 2 copies: 1 for the CBT Club and 1 for the customer
5. Cash book: details of all income, expenses and contributions to the Community Fund
6. Job queue: To ensure that opportunities for work are distributed between members



Tool 12: Booking form

Jamali CBT Receipt

Customer:		Date:			
Address:		Book No:	Receipt No:		
No	Item	Description	Unit Price	Qty	Amount
1	Guide	1.1. Half day	300	1	300
		1.2. Full cay	500	1	500
2	Activities	2.1. Welcoming By Alkalo	100	1	100
		2.2. Fullani Riti Tradition Instrument	600		600
		2.3. Skill center	300		300
		2.4. Women organic garden	300		300
		2.5. Rice Pudding (Min 4)	150		150
		2.6. Wood Carving	300		300
		2.7. Other activities			
3	Other				
Total					2 550
Received by:			Date:		

A cash book, containing at least the following information:

1. Date of transaction and name of the person or organization paying or being paid
2. A description of the item / service (e.g. meals, guides, stationary, petrol)
3. One column for income and a separate column for expenses
4. A column for Community Fund deductions



Tool 13: Cashbook

Cashbook							
Month:							
Date	Name of organisation	Total Received	Description	Income	Expense	Balance (10%) for community fund	Signature

Community Fund



Establishing a CBT initiative creates expectations that the whole community will benefit from tourism. However, it is highly unlikely that all community members will be either interested or able to work as service providers.

Many community members are often satisfied to continue their regular work, or they may have family commitments like young children or elderly parents which prevent them from being able to join actively in CBT activities.

A community fund is a useful tool to ensure that CBT creates benefits beyond individual service providers. A Community Fund is a micro-tax. Service providers agree to contribute a modest percentage of their income into the fund. E.g. 10% of their income from food, guide fees, etc. When effectively managed, a community fund builds capacity and confidence in how the community manages money.

Community funds can be used to:

1. support local social and environmental work
2. contribute to stationery, bills, meeting costs and travel outside the community by CBT team
3. pay for work by the CBT Coordinators / accounting team, etc.

To maintain trust, the percentage of community funds which are allocated to be used for these three functions should be formally agreed, accounted for, and reported.



Examples of projects supported by CBT community funds include welfare for students and the elderly, rice banks, construction or repair of public places, donations towards sporting, spiritual and environmental conservation events.

These contributions can increase appreciation and understanding about the role and value of CBT activities among the general population in the community.

The CBT fund is a tax on service providers, not on tourists. Therefore, it is better for the community fund contribution to be deducted from service providers' income, rather than added to the bill. Make sure that you always agree on community fund contributions before discussing and agreeing prices for CBT products and services.



How to establish a community fund

If CBT community funds are not established carefully and transparently, they can create conflict. The trainer needs to introduce and discuss the concept, value and use of community funds to the CBT Club and service providers. For example:

1. The CBT club will inevitably have administrative expenses.
2. The CBT club will require money to pay for communication, promotion, attending meetings, etc.
3. Initially, CBT Coordinators can be volunteers. However, as the number of tourists increases, coordination becomes a bigger job, which should be compensated.
4. The CBT fund can provide a salary for CBT managers, coordinators, accountants, etc.
5. CBT does not only aim to create income for CBT service providers. The CBT Club are using common / shared resources, so the overall community should also benefit.
6. Community funds can be used to support community development. Examples of contributions include scholarships for students who study in the city, welfare for elders who are living alone; funding rice banks; or nature conservation activities.
7. If community members do not observe any broad benefits, they may oppose CBT.

Tool 14: Community Fund

Date	Description	COMMUNITY FUND			
		CBT fund	Coordinate team (30%)	Admin / office (20%)	Community Dev (50%)

How to manage community funds

1. Payments for CBT services should be paid only to CBT Club Coordinator by clients
2. The CBT Coordinator deducts 10% from each individual's service fees as a contribution towards the community fund and pays the balance (90%) to the service providers.
3. The coordinator records these service payments and deductions in the accounts book.
4. At least once every two weeks, the Community Funds are deposited in the bank.
5. The CBT Club members discuss, decide, and record how the funds will be used.
6. Usually, a percent (e.g. 30%) will be retained for group administration costs, and a further percent (e.g. 30%) will contribute to the time of the CBT Coordinator(s).
7. Remaining funds support social/environmental work to benefit the whole community.
8. A Community Fund Committee is established, which includes CBT club members and non-CBT club members (e.g. teachers, elders, spiritual leaders). Every 6 months, the size of the fund is reported to the committee / the whole village at a village meeting.
9. The committee / villagers are invited to propose how these funds could be used (e.g.) for welfare of elders, scholarships for students, repair of public buildings, events).
10. The committee makes a final decision and reports the results back to the community.

Managing and monitoring positive and negative impacts

It is essential to monitor and manage the positive and negative impacts of CBT. However, in practice, local villagers are pragmatic. Most people are more concerned with problem solving today than abstract discussions about 'what might happen' in the future. Community members also cannot prioritise data collection above existing daily tasks. So, keep it simple.





Moreover, many impacts are not easily captured by quantitative systems. For example, when considering carrying capacity, it makes sense to assume that smaller groups of tourists will have fewer negative impacts than bigger groups. However, in practice, small groups of poorly prepared tourists with high demands and unrealistic service expectations can be a much worse experience for local people than welcoming 60 to 100 students, who are polite, energetic, and genuinely interested to meet local people and experience local life. Local people also become able to welcome more, different types of visitors as they gain experience.

For these reasons, **it is important to see CBT as a dynamic process**. The role of the CBT Facilitator is to help the CBT club to observe and discuss changes and challenges as part of their routine. In this way, challenges can be identified, and solutions can be proposed as quickly as possible.



Key CBT management tool: routines and regular meetings

Monthly Meetings help to ensure open communication between CBT Club members. Meetings are a space to review and recognize progress, discuss challenges, and agree on solutions. During the first 12 – 18 months of CBT operation, CBT trainers and supporting organisations (GOV / NGO) should back-stop this work.

Preparing for Monthly meetings by the CBT Coordinator):

- Make an appointment with CBT Club members.
- Make sure the bookings and cash book are up to date.
- Prepare a simple financial report. This report should include at least the number of tourists, income from tourism, expenses, and community fund contributions. It will also be useful for further planning of the report includes the numbers of tourists per channel, and income per service.
- Identify any important issues or challenges which need to be monitored.
- Prepare an agenda of issues for the monthly meeting.



Holding and following up monthly meetings:

Monthly meetings should be held where the following programme is suggested:



1. Welcome the members.
2. Follow up any progress on agreements from the previous meeting.
3. Present the financial report, and report use of the Community Fund.
4. Discuss cooperation with partners (e.g. tour operators, government).
5. Discuss priority local issues (e.g. visitor behaviour, water, waste, etc.).
6. Listen to additional feedback or requests for support by CBT members.
7. Agree on any follow up or solutions, responsible persons and deadlines.
8. Make a simple report of the meeting and agreements made.
9. Make sure that responsible people take follow up actions as agreed.

Biannual: village survey walks, and household interviews should be undertaken to observe, assess and update any positive and negative impacts of tourism. Surveys and interviews should include households which do not participate in CBT.

Annual: Partners Meeting with private and public sectors to discuss strengths and weaknesses of cooperation, review and agree on programme and price for next season



BE PREPARED

Effective CBT management requires more than a couple of short trainings. On the job coaching, and backstopping CBT Coordinators while they gain experience are essential ingredients of building local capacity to manage CBT. You may find that systems (e.g. booking, accounting, queues) which have worked well in other communities are too complex in a new community, with different levels

of education, literacy, etc. So, be prepared to work alongside local people, observe any challenges, adapt and simplify your tools to be fit for purpose in the community where you are working.

Step 13: Train Community Tour Guides



WHAT'S THE ISSUE?

Local community tour guides have one of the most important roles in CBT. They represent the community and tell their stories to visitors, often with the help of professional guides. From a market perspective, local guides make the experience of visiting a local community much more intimate and authentic. Tourists love to hear local people tell their own stories.

A useful frame for training local community tour guides is the 3 S's Safety, Story and Service (CBT-I, 2007). The 3 S's are simple to understand and practice.



IN THE FIELD

Train Local Guides

You will often find that new community members, who have not participated in previous activities will be interested to join guide training, especially local youth. You will usually need to train them about tourism as well as guiding skills, including the 3S Frame of guiding skills.

The 3S Frame: Safety, Story, Service

Safety

Safety is vital to any tourism activity. Often activities come with risks which can pose a threat to guests: e.g.



Examples of risks include:

Steep, slippery slopes

Uneven stairs

Falling overboard a boat

Dark pathways at night

Dangerous animals

Bad weather

2 types of risk:

- **Fixed:** we know that the risk is there – e.g. hippos in a particular spot in the river; a dangerous dog at a particular house.
- **Dynamic:** unpredictable e.g. a snake, or sudden storm. We must anticipate these as best possible when planning e.g. check the weather forecast, keep a lookout, take safety precautions.

Story

A great story, told by local people in their own words and from their own experience is one of the highlights and unique selling points of CBT, compared to regular sightseeing tours.



Community members must work as a team to identify and practice great stories along their route. Village elders and spiritual leaders should be invited to guide training so that they can share detailed information (and to avoid disagreements over historic details in the future).

Service

The 3 M's and 3P's of great service:



<p>A guide with a good service mind is interested in tourists. They:</p> <ul style="list-style-type: none">■ Give a warm welcome■ Show interest in tourists■ Anticipate their needs and offer help■ Give tourists privacy and personal space■ Are friendly, patient, calm and caring■ Never get angry or impatient■ Avoid alcohol■ Never flirt with guests!■ Tourists feel comfortable with a guide who has a service attitude.	<p>A guide with a good service manner:</p> <ul style="list-style-type: none">■ Is punctual■ Is well informed■ Is always eager to learn new things■ Presents information clearly and logically: step by step■ Follows the agreed tour programme, and always ask tourists before making any changes■ Is clean and well presented■ Balances friendliness with maturity■ Has good problem-solving skills■ Always have a 'Plan B' ready for emergencies	<p>A guide with good service management:</p> <ul style="list-style-type: none">■ Is well prepared■ Ensures smooth service during the tour■ Has a good follow up after the tour■ Before the tour, the guide will:<ul style="list-style-type: none">■ Carefully review the number of tourists, their age, interests, and any health issues■ Review the tour programme carefully, check arrival times and pick-up points■ Re-confirm the precise number of meals, drink, transport, and activities with service providers, including special needs like vegetarian food
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Local Community Guides Training: Delivery

This section explains how to deliver the trainings described in the section above.



Topic 1: Review:

1. Review participants' understanding of tourism, tourists, and CBT.
2. Review the steps taken so far to develop CBT in the community.
3. Ask participants "What are the roles and responsibilities of a tour guide?"
4. Group these different roles and responsibilities using the 3S frame. **Safety, Story and Service**



Topic 2: Tour Planning

1. Survey and map the proposed CBT route, clearly marking each place / person / activity which is included in the tour.
2. Safety: Identify risks with an 'X' and make a safety plan to reduce / manage each risk.
3. Story: Identify important storytelling spots.
4. Service: Identify exactly where tourists will eat, drink and use the toilet during the tour.

Topic 3: Safety

1. Participants must go back to the map with the X marks indicating potential risks.
2. The trainer gives feedback to the community members.
3. Suggest any risks which community members may not have recognized, because they feel familiar with their daily surroundings.
4. Identify potential risks (either fixed, or dynamic) on the route.
5. Draft a safety plan to reduce each risk, by carefully considering exactly what actions can be taken at four different times:
 - » *Before tourists arrive in the community:* e.g. carrying a first aid kit, checking weather, carrying the right equipment
 - » *Before starting each activity (e.g. briefings, equipment which needs to be prepared, etc.)*
 - » *During each activity (how to keep tourists safe)*
 - » *If an accident or emergency takes place*
6. Participants agree who will be responsible for actions.
7. Participants present this draft safety plan for feedback.
8. The trainer provides feedback on measures to reduce and manage risks.
9. Based on feedback, the community members improve their safety plan.
10. Record the plan into a written document and keep it in a public place.
11. Practice in the field:
 - » Walk the route, with the tour guides.
 - » Divide into 2 groups. 1 group will take turns being guides and managing safety.
 - » The other group are the 'tourists' who also note strengths and weaknesses of safety management.
12. The CBT trainer provides feedback to trainee guides.

Topic 4: Stories

We need to tell stories that 'hook' the interest of our visitors from the start! Here are guidelines for creating a good story.



1. Villagers map the main storytelling points onto the tour route map.
2. Agree on **the story** for each spot – work together and consult a village elder to check information.
3. Villagers discuss and briefly explain “why each person / place / activity is special and important to the community?” in three to five sentences.
4. Villagers discuss and agree extra information for each place / person / activity.
5. Use different ways to start a story that will impress tourists and stimulate their interest, e.g.:
 - » A question: What do you think this is...?
 - » A statement: Here we have.... The biggest/oldest/first
 - » A connection to their own heritage: Janjanbureh was originally called Georgetown in colonial times...
 - » A fascinating fact: The island was said to be inhabited by evil spirits to whom human sacrificed had to be made every year.
 - » A joke: What is the difference between...



6. Discuss and agree on how to use **the 5 senses** to make storytelling a better experience.
7. Think up a **WOW** way to start telling the story.
8. Practice storytelling and asking / answering questions on the spot.
9. Practice an engaging style of storytelling: Clear, Confident and Caring.
10. Practice how to adapt content, time and delivery to guests (e.g. children).
11. Practice welcoming visitors and briefing them on the overall tour programme.
12. Practice working with artisans / musicians etc. to demonstrate their skills:
 - » First introduce the artisan. Ask them direct questions, so that they can participate, rather than just 'explaining' who they are to guests.
 - » The artisan demonstrates their special skill to the tourists.
 - » The tourists have a chance to have a go / try their hand.
 - » The tourists have a chance to ask questions to the artisan.
 - » The tourists have an opportunity to buy a souvenir.

Topic 5: Service

Before the tour, the local guide must:

- carefully review the number of tourists, their age, interests and any health issues.
- review the tour programme carefully, check arrival times and pick up points.
- re-confirm the precise number of meals, drink, transport and activities with service providers, including special needs like vegetarian food.



During the tour, the guide will:

- keep a careful eye on tourists' needs for food, water, rest and toilet stops.
- pace themselves so that the tourists can keep up with them comfortably.
- go slower if needed for people who struggle with walking.



After the tour:

- The guide will ask for feedback and share with the service providers.
- They will identify what to improve and take action.
- A simple feedback form may be used.



Tips to teach this

Show a video, or conduct a role play to demonstrate excellent service attitude and manner. Depending on the CBT group structure, you may need to invite food providers to participate in this part of the training too.



Topic 6: Welcome Meeting

It is very important to conduct a brief welcome meeting when tourists arrive at the village:

- First, the licenced tour guide introduces the tourists to the CBT Club / local community guides.
- Next, the community tour guide welcomes tourists to the village and briefs them on the CBT tour.
- The meeting emphasises the important role which local community guides play in the CBT programme.
- This increases the likelihood that tourists will respect and pay attention to the community guides during the tour.

Community members will need to consult carefully over what information to include in the Welcome Meeting, and practice delivering the welcome meetings confidently. Typical content of a welcome meeting includes:

Part 1: Overview of the community

1. Warm welcome to the village by local community guide.
2. Introduce the CBT Club guides and other members (if they attend).
3. Explain briefly about why the community developed a CBT programme.
4. The population and number of households.
5. Occupations and main sources of income.
6. Faith / religious beliefs in the community.

Part 2: Overview of the CBT programme today

1. Explain that the CBT programme shares very special people, places and activities which local community members feel proud and comfortable to share with guests.
2. Key content: Where will we go / who will we meet / what will we do today?
3. Using a map, briefly introduce the route, sequence and rough timing of activities.
4. Explain where and what time the tourists will eat / can take toilet stops.
5. Warn the tourists of any significant risks and explain what they can do to keep safe.
6. Brief them on adventure activities. E.g. the length of treks, protective clothing, etc.
7. Discuss any important taboos / do's and don'ts / rules for photography.



Tips:

1. Identify where tourists will eat, drink and use the toilet; and plan exactly what needs to be prepared (e.g. the number of meals, drinks, etc).
2. Practice welcoming tourists when they arrive to the community.
3. Practice leading the CBT tour, with 'safety', 'story' and 'service'.



BE PREPARED



Local community guides and the CBT team may need to work with both an international tour leader (TL) and a licensed, professional tour guide (e.g. from the national capital). Sometimes, tour leaders and guides will be well prepared and support the local CBT team. Sometimes, tour leaders and guides may be running a trip 'blind', for the first time. They may not understand the CBT program. They may feel worried about risks, or embarrassed and not want to lose face in front of the guests. The CBT Coordinator should always contact the professional licensed guide accompanying the tourists in advance, to confirm the program, meeting place, and any unforeseen challenges which may affect the program (e.g. bad weather or a death in the village). The CBT coordinator should ask the professional guide to brief tour leaders about CBT and the role of community guides before the group arrives in the village.





Step 14: Train local Hospitality providers

This step covers working with community members who will provide food and accommodation services to tourists as part of the CBT experience. In some rural villages there may be commercial, informal restaurants or guesthouses. In other communities, there may be not be any informal eateries or guesthouses/lodges.

It will be up to the project to decide if and how to include any existing tourism micro enterprises into the CBT programme. If they offer an authentic local experience such as a open air barbeque with local music and décor, it may be an excellent way to include and contribute to the existing local enterprises.



Where there are no such enterprises, or they do not offer a unique or authentic experience, then the project should identify community members who would be willing to offer either food (in a food group) and/or accommodation in the form of homestays.

Whatever the set of circumstances (existing enterprises or groups, or both), the project team will work with these community members to enhance their menus, their cooking skills and, very importantly, their food hygiene. They will also help with pricing, presenting food and with how to serve food to guests.

WHAT'S THE ISSUE?

Meals and eating are a very important part of guests' memories. Tourists do not only buy 'food' to relieve hunger, but also to experience local life. Local dishes and spices, fruits and vegetables offer new taste sensations to tourists. So, it is important to craft an enjoyable experience and great memories. Offering food services gives community members opportunities to share their local food heritage, earn income, and improve their own food hygiene practices and diet choices for the whole family. Offering food can also motivate community members to

plant their own crops and raise their own animals to save costs.

Meals need to be included smoothly into the overall programme. Therefore, it is important to consider where food will be prepared, how it will be delivered (or carried) and where and what time food will be eaten. E.g. at a local home or restaurant, at a temple or village hall, on a viewpoint, during a trek/walk, or at a scenic spot close to the village at sunset, etc.

Overview of the menu development and food safety training process

Food preparation training requires professional knowledge. If you are not a food expert, you must work with a food preparation and hygiene specialist to deliver this training.

ITC experienced best results for food training when food hygiene specialists worked as a team with local trainers who spoke the native language of the participants. This gave the community food providers confidence that the lessons would not be too difficult for them. Trainers were able to make recommendations which were adapted to the realities of life in the village: i.e. no fridges, very simple kitchens, etc.

Tourists from other countries are not used to our culture and foods. They may have the following challenges with local food:



- Unusual and strong local flavours (e.g. very spicy)
- Unfamiliar with the ingredients
- Worried about food hygiene and getting sick
- Children won't eat local dishes
- Tourists get tired of the same dishes all the time (e.g. domoda every day)

We therefore need to carefully plan what dishes to make and present, and train the local food group to cook and serve these dishes safely. Develop menus and packaging which are appropriate to the place where the meals will be transported to and eaten. E.g. soups may not work well for picnic lunches. Provide simple training / coaching in seasonal menu development and food hygiene.





IN THE FIELD

Food Group Training Workshop

Finding food or meal providers:

There are different options on who could provide meals for visitors:

- **Community hosts:** cooking in their homes in a food group
- **Community micro businesses:** small eateries with some basic equipment and premises



Whichever will provide the meals, they need to be trained and equipped to serve safe, acceptable food to visitors.

The first thing to do is get a sense of what is available locally (ingredients, equipment, facilities) and skills so that suitable dishes can be planned.

1. Survey the local market, to see what kinds of ingredients are available.
2. Survey food in the community (crops, vegetables, livestock, etc.)
3. Survey kitchen conditions in the community: the physical conditions of the kitchen and dining area, and the knowledge and behaviour of cooks, what equipment or energy sources are available, do they have electricity, refrigeration, etc.
4. Identify if additional equipment will need to be provided to the community.
5. Identify special local dishes, and beliefs associated with particular dishes. For example, special dishes which are eaten during festivals and ceremonies.
6. Confirm which community members are interested to offer food to tourists.
7. Confirm which community members are happy to welcome guests at home if this is the option chosen for providing food.

These community members must be trained to understand food hygiene and to prepare and present delicious, hygienic, local dishes which tourists will enjoy.

Workshop programme and delivery:

1. Show your participants (community food providers) some photos of tourists eating local dishes. Ask them why tourists are interested to try local food, and what challenges tourists may face when eating local dishes? E.g.:

Why are tourists interested in local food?

- Enjoy a tasty meal.
- Spend time with a local family.
- Enjoy an authentic, local experience in the community.
- Learn why dishes are important to local culture and beliefs.
- Create income for local people.
- Learn how to cook a local dish.

What challenges might tourists face?

- Unusual and strong local flavours (e.g. very spicy).
- Unfamiliar with the ingredients.
- Worried about food hygiene.
- Upset stomach.
- Food poisoning if the food is not prepared hygienically.
- Children won't eat local dishes.

2. Explain that, where possible, meals should be prepared using local ingredients. Ask community food providers to brainstorm which kinds of ingredients are grown or available in the village during each season?
3. Brainstorm about special local dishes, and beliefs associated with particular dishes (e.g. special foods only eaten at ceremonies).
4. Consider how menu choices can complement the local 'sense of place'. For example, fresh fish can complement a beach barbecue or a picnic by a river.
5. Explain that 'where we eat' and 'when we eat' is as important as 'what we eat.' Consider the best places and times of day to eat different meals.
6. Food providers then develop menus that are appropriate to the food delivery option e.g.:

- » **Food groups** who serve one meal e.g. lunch to visitors: choose 5 'main' dishes (e.g. soup, curry, salad, stir-fry, dipping paste), **per season**, which include meat or fish and vegetables.

- » **Overnight accommodation:** develop breakfast and dinner menus.
- » **Small restaurants:** develop a selective menu with a number of options a diner could choose from.

7. Consider whether any of the dishes include endangered, rare or forbidden ingredients, such as wild forest meats, and remove these dishes.
8. Consider whether any of the dishes are extremely pungent or have unusual odours or flavours, and remove these dishes (e.g. highly fermented foods).
9. Explain that food hygiene and personal hygiene – physical cleanliness - are essential when preparing and servicing food to tourists. Give an overview of the key principles of food safety, food hygiene and personal hygiene.
10. Explain that, where possible, food providers should use local, reusable, environmentally friendly materials to package and present food. Brainstorm local options for environmentally friendly packaging and presentation materials.

11. Demonstrate how to set a table hygienically and attractively.
12. Explain that meals need to be included smoothly in the tour programme. Consider how food can be prepared or transported to different highlight spots in the draft CBT programme, so that it can be served fresh and hot? For example, a local home, village hall, viewpoint, while trekking, or at sunset on the beach. Some dishes are not appropriate if they need to be transported.
13. Divide the food group into small groups, to plan different tasks in detail. E.g.:

<ul style="list-style-type: none"> » design a seasonal menu. Provide two options simple one-dish meals, and a set of at least 3 dishes. Design a vegetarian and non-vegetarian option for each seasonal menu) 	<ul style="list-style-type: none"> » plan how to prepare kitchen and dining areas » draft a story to introduce the different dishes in an interesting way
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14. The food providers should work on these tasks in small groups, and present their ideas back to the other participants, with feedback from trainers
15. Give the food providers a practical assignment to prepare ingredients, equipment, kitchen and dining area for 8 guests. The trainer(s) observes the process
16. Trainer(s) use a simple criterion to give feedback to the food providers. E.g.:

<ul style="list-style-type: none"> » kitchen and equipment hygiene » hygienic preparation » preparation of the dining area » good flavour » appropriate size of portions 	<ul style="list-style-type: none"> » sufficient variety » presentation » use of local ingredients » storytelling
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Menu development:

- Identify which seasonal vegetables are available (Winter/Summer/Rainy Season)
- Brainstorm / learn recipes for soup, stir fry and curry using your own vegetables
- There should be at a variety of dishes. E.g.: soup, curry, stir-fry, vegetables
- Salads may be another option, if you can guarantee that water is clean, and that all vegetables / fruits are peeled on site, immediately before eating the salad.
- The experience can be made more interesting by:
 - » inviting guests to collect food from the farm with the cooks, and / or
 - » teaching guests how to cook the dishes
- These should be optional activities. Many people will prefer to rest and eat.



Tool 15: Menu Planning Worksheet

	Menu 1	Menu 2	Menu 3
Main Dish option 1			
Main Dish option 2			
Side dish			
Side dish			
Side dish			
Dessert			

The facilitator should help the CBT team to prepare and practice the whole process of brainstorming menus, preparing the food, packing the food and serving food. Use biodegradable packaging such as banana leaves or washable packaging such as lunchboxes. The facilitator should help the CBT club members to practice explaining the food and any related stories. E.g. stories of food which is only eaten during special ceremonies or seasons.



Simple and essential action to improve food hygiene and safety

Tips for training community members in personal hygiene

1. Tourists will notice your appearance. It is essential to be clean.
2. Wash, shower or bath every day.
3. Wash your hands with soap:
 - » Before starting work
 - » Immediately after going to the toilet
 - » Between touch raw and cooked meats and fish
 - » Every time you touch a dirty or contaminated material
4. Cover your hair
5. Remove jewellery and watches
6. Avoid spitting, smoking, sniffing, scratching, coughing, or biting your nails



Tips for training community members food safety and hygiene

- Always check with tour operators or guides if your guests have special needs. For example, they are vegetarian, or they are allergic to nuts or milk.
- Kitchen, cooking surfaces and drains need to be carefully cleaned.
- Use clean water. Boil water before use. Store water in clean containers.
- Equipment needs to be cleaned, and separated for meat and vegetables.
- Store all ingredients separately, in clean containers with lids.
- Use separate cutting boards for meats, fish, vegetables, raw and cooked foods. Never cut food onto the palm of your hand. Always use a board when cutting or preparing food as it is easy to clean afterward.
- Meat, fish and vegetables need to be cleaned with fresh water.
- Food must always be prepared on a table, and never on the floor.
- Make sure that hot meals are well cooked.
- Collect, store and dispose of waste carefully, away from food.
- Keep domestic pets and livestock out of the kitchen.



Food choices:

- Hot food, such as curries, soups and stir fry are safest.
- Salads may be an option, if you can guarantee that water is clean, and that all fruits and vegetables are peeled on site immediately before eating the salad.
- Always check with tour operators or guides if your guests have special needs. For example:
 - » they are vegetarians
 - » they are allergic to e.g. nuts, wheat, eggs or milk
- **Vegetarianism:**
 - » All vegetarians do not eat meat products such as meat, chicken, fish, shellfish, any meat products like sausages
 - » Some vegetarians may eat dairy products (milk, butter, cheese, yoghurt) and eggs.

Tips for preparing the dining area and table

- Clean the dining area and toilet thoroughly before guests arrive.
- Ensure you have sufficient chairs / mats or blankets for a picnic.
- There should be at least 3 different dishes in a set.
- Make sure that clean water is available.
- Use a tablecloth. Local, ethnic designs are best if possible.
- Place one kind of each dish on the table at a time, and refill if necessary.
- Each guest should have their own individual dishes, cup, and cutlery.
- Provide an individual bowl and spoon for each person for soup.
- Provide central serving spoons for every dish.
- Prepare a water bowl for washing hands with hand towels.



- Place the fork on the left and the spoon on the right.
- Place glasses and cups on the right.
- At the start of the meal, explain what each dish is called, what ingredients it contains, where the ingredients are from and any other interesting stories.
- Explain which dishes are vegetarian, or for people with allergies explain dishes without allergens.
- Offer extra salt, pepper, chilli, sugar etc.



Picnics

- Clean the picnic area in advance.
- Make sure you have clean picnic blankets.
- Make sure you have sufficient cutlery.
- Make sure you have sufficient water.

Breakfast dishes

A traditional breakfast with the family may be served in homestay accommodation. In small lodges or guesthouses, the breakfast should include a range of items including the following:

- **Hot drinks:** Tea and coffee with milk and sugar
- **Hot protein item:** e.g. omelette, frittata, French toast, eggs, fish, sausage
- **Accompaniments:** grilled tomato, baked beans, fried potato
- **Bread:** bread for toasting, or baguettes, with butter and jam
- **Fruit:** fresh fruit and/or juice

A simple worksheet can be used to plan a range of three breakfast menus for lodges or guesthouses.



Tool 16: Breakfast Menu Planning Worksheet

	Menu 1	Menu 2	Menu 3
Main Dish option			
Side dish			
Side dish			
Side dish			
Extras			
Fruit and/or juice			

Breakfast presentation

Present breakfast attractively in the dining area. You may place all the breakfast items on a table or counter for guests to help themselves to drinks, break, jam, etc. You may serve hot dishes as they are made. Some guidelines include:



- Serve food in attractive containers or dishes
- Do not put boxes e.g. tea boxes on the table; put teabags into a small bowl or basket
- Provide clean, good condition service equipment
- Present everything attractively: drinks elements together; breads, jam and butter together, etc.

Your job as a trainer:

Local food is a highlight of CBT. Success relies on local capacity. Initially, food providers will probably lack confidence. Good feedback and on the job training will help them to improve. They need to practice, practice, practice. As trainer, your job is to observe and give feedback on different stages of preparation and delivery. Don't forget to help the participants to practice explaining the food and any related stories. E.g. stories of food which is only eaten during special ceremonies or seasons.

After you have enough experience, you will be able to set a fair price for the food, based on market costs, lost opportunity costs, any travel costs which are necessary to bring food from local markets and the time taken to cook.

Tool 17: Menu Development: Recipe File

Recipe File

Depending on literacy levels, it may be useful to develop a file of simple recipes for the community to use to expand their repertoire.

Because tourists are often served the same traditional dishes, or the same breakfast, it could be useful for food providers to learn a few simple recipes that would appeal to tourists, and that are made with local ingredients.

An example would be something like French toast which could easily be made in The Gambia using a slice of baguette and eggs, and drizzled with local honey. This would be an appealing breakfast dish to many tourists.

A recipe file was developed for the training of food providers in The Gambia and included breakfast dishes, simple salads, easy main courses and desserts all based on local ingredients available in the markets and within the range of equipment and facilities available.



Accommodation provider training



When looking for accommodation providers, there may be different options on who could provide accommodation for visitors:

- **Community hosts:** hosting visitors in their own homes as homestays
- **Community micro businesses:** small local lodges and guesthouses

Whichever will provide the accommodation, they need to be trained and equipped to provide clean, comfortable accommodation to visitors.

Tips for local accommodation providers:

- Provide clean **sleeping quarters** for guests.
- Clean guest **bathroom** facilities.
- Follow good practices for **laundry** of guest bedding.
- Prepare clean and welcoming **public areas** for guests.
- **Housekeeping training should cover:**
 - » Cleaning agents, equipment, and methods.
 - » Guest expectations about accommodation.
 - » Basic amenities to provide in a guest room: e.g. linen, pillow, towel, soap, bottled water, rubbish bin, toilet paper, toilet seats.
 - » Insect control (cockroaches, flies, mosquitos, wasps).
 - » Simple housekeeping procedures for guest room and bathroom cleaning.
 - » Standards for public areas including guest restrooms.
 - » Basic maintenance: light bulbs, door handles, plug points.
 - » Housekeeping training should include recognising and cleaning dirt.



If the CBT team does not have the skills to provide basic accommodation training, then source an expert like trainers from a hotel school or hospitality college to deliver this training. Note: these trainers must be very carefully briefed to ensure that the training matches the local environment, and while teaching best practice (e.g. food hygiene) does not overlay standards or skills that are not authentic or traditional. There have been cases where homestays have been taught to make fancy dishes like hollandaise sauce, and to provide silver service, which are totally inappropriate in the context.

Note:

- CBT accommodation is not formal hotel accommodation. There must be high standards of hygiene, but keep the product authentic and comfortable.
- Provide clean linen and towels for every guest.



Skills for Local Accommodation Providers



If the CBT team does not have the skills to provide basic accommodation training, then source an expert like trainers from local tourism or hospitality colleges to deliver this for you.

CBT accommodation is not formal hotel accommodation; there must be high standards of hygiene but keep the product authentic and comfortable.

Provide clean linen and towels for every guest etc.

Community Hosts

In the context of CBT, 'homestay' means that visitors stay in a guest room inside a private family house. Family members must have consulted and be happy to welcome guests into their private home.

If family members are not comfortable to welcome guests into their private homes, then developing a community lodge is a better option.

Tourists consider accommodation a huge part of their experience because they can:



Spend time with a local family.

Enjoy an authentic, local experience in the community.

Understand daily life tasks.

Enjoy local food and eating culture.

Create income for local people.



Homestay Principles



In CBT there are a few things trainers should consider when choosing an appropriate homestay:

- Family members are prepared and happy to welcome guests.
- Hospitality skills: warm and friendly welcome; introducing the family, and important areas of the house to visitors.
- Taking care of tourists' safety and giving appropriate advice.
- Cultural exchange between family members and tourists.
- The host family is knowledgeable about CBT and the community (history, agriculture, etc.).
- Politely dressed, not flirtatious with tourists, peaceful at night (don't let the kids sing karaoke!)

Challenges in Homestays

A local homestay can be very different from tourists' homes. Homestay providers need to have an understanding of the following if they will be welcoming strangers/visitors into their homes:



- Expectations for privacy may be different.
- Different cultures have different levels of tolerance for personal questions. Make sure to inform guests and hosts what kinds of questions are appropriate, and warn them what kinds of questions to expect!
- Being too close to domestic animals and farm animals can scare tourists.
- Daily schedules, for example when roosters and villagers wake at the crack of dawn to send the family off to the farm.
- Translation. Professional tour guides cannot be everywhere at once. Local community members need to be able and happy to manage guests with minimum language skills.
- Matching suitable hosts and guests is sometimes necessary. For example, a family with teenage daughters may be uncomfortable to welcome a group of male young adults.
- Different cultures have very different levels of tolerance for allowing people to get physically close ('in our personal space').
- Alcohol and any kinds of drugs should be totally avoided. Situations can get frightening and ugly for guests and hosts.



Considerations when Training Homestay Providers

The local homestay providers may lack confidence and need good feedback, on-job training and a lot of practice.

As the facilitator your job is to help the CBT team think about the opportunities and challenges that come with inviting tourists to stay in their homes. It is also your responsibility to train homestays how to host, prepare and manage certain aspects of homestay welcome and service.

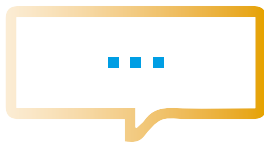
Skills for Homestay Providers

Homestay providers must be trained to:

- **Consult** at community and household level about their options, i.e. if they wish to welcome visitors into private homes, or prefer an 'ecolodge' option. They must ask their families and community which is the better option at household and at community level.
- Prepare shared **family living areas** (e.g. living room) to be safe, welcoming and hygienic. They will prepare an area for tourists to 'sit and chill'.
- Prepare **sleeping areas and bathing / toilets** to be comfortable, safe, hygienic and private.
- Give a **warm welcome** and offer opportunities for cross-cultural exchange and experiences.
- Prepare **kitchens and dining** areas.
- Prepare **suitable meals** including dinner and breakfast.
- Prepare **cross cultural activities**.
- Manage **animals**.
- Manage **money**.



Consulting: Homestay or Lodge



Some communities will not be comfortable with having tourists in their homes overnight and a lodge would be the better option. It is important to explain the details of homestays to the community and give them the option of trying.

Details to go over include:

1. What is a Homestay?
2. Guest and hosts' expectations?
3. How can host families benefit?
4. Introduce the training steps needed to prepare for Homestay
5. Share simple homestay standards, feasible for local families
6. Share examples of guidelines / do's and don'ts for hosts / guests
7. Consult: If community members want to offer homestay but are not ready, what help is available?



Premises

Tips for the home and surrounding areas:

- The house must be solid and strong, not damaged or dangerous (no broken stairs or rotten floorboards).
- The roof does not leak.
 - » The house is airy and comfortable with no stale smells.
 - » There is no risk that animals may carry disease in the home.
 - » The area around the home is kept clean, pleasant, free of litter, free of weeds and thorns, and should be planted with trees and flowers.



Tips for living areas:

- » There should be an area / corner to relax in the home.
- » The number of tourists is set, with consideration to the size of the house, the number of toilets and the ability of the hosts to provide good service.
- » The host must restrain pets before the arrival of tourists.
- » The house is clean and orderly.



Tips for sleeping areas:

- » Equipment should be clean and sufficient for the number of tourists.
- » Sheets, blankets, pillow cases and towels should be cleaned each time before welcoming guests.
- » There should be a private area for guests to sleep (if there is no separate bedroom, a thick sheet can be used to create a private sleeping area).
- » The room should be airy, with no stale smells.
- » There should be a waste basket and clothes hangers or rail.
- » Drinking water should be available near the bed.
- » The homestay should be able to offer twin / separate beds if travellers travel together, but do not wish to share a bed.



Tips for the bathroom and toilet:

- » The toilet is clean and hygienic, regularly cleaned, with no bad smells.
- » If toilet and shower are in the same room, there must be a basin to wash hands.
- » The toilet should be clean and private, with a lockable door.
- » The toilet should have a seat in good condition.
- » The floor is not slippery, water can run off easily and there is sufficient light.
- » There is a waste basket for rubbish and rail or hooks for towels.



Tips for the kitchen and meal preparation:

- » Cooking equipment is clean and washed after use.
- » Kitchens are clean and airy, with enough light, and equipment is stored neatly.
- » Food is clean and hygienic, cooked, with a serving spoon, ingredients are always washed before cooking, and cooks wash their hands before preparing food and cooking.
- » Food is made from mostly local ingredients.
- » Guests have the chance of cooking with homestay families.
- » The amount and quality of food represents good value for money and is sufficient for the number of tourists.
- » There are enough plates, cutlery, etc. for the number of tourists; crockery is not chipped or cracked.
- » Drinking water is clean, hygienic, kept in clean and sealable containers.
- » Food is served on time.
- » The host explains the food to the guests.

Preparing Cross-Cultural Activities



Cross-cultural activities are what make CBT so exciting, it is important to note:

1. Cultural exchange with the host family is a 'must' highlight of homestays.
2. Tourists love to feel that they have been welcomed like 'one of the family'.
3. Tourists also need privacy, so host families must find a balance between activities and giving guests space and free time to relax.
4. Family members must be prepared and happy to welcome and interact with guests.
5. The host family should be able to explain CBT and the community (history, culture, festivals, etc.)

Managing Money



If homestay is offered by the CBT group, money will be collected by the CBT coordinator. However, if homestays are offered independently, families may take payment individually.

Families should establish common standards for their accommodation and follow these.

It might be useful to establish a queue or rotation system so that all members get turns to host guests and benefit from them staying and paying.

Tourists staying in a homestay expect cultural exchange, not only a place to sleep.

So, pricing should take into account that family members will need to spend some time and do some activities with tourists during their stay (e.g. cooking, weaving, visiting a home garden).

Specific services should have clear prices. E.g.:

- Price for accommodation (don't forget to consider costs for cleaning / washing sheets etc.)
- Price for activities (e.g. cooking class, farm visit)
- Contribution to community fund
- Or, a clear package price / person including all above

Training Homestay Providers

Preparation for training includes the following steps:

- Raise awareness about homestay principles.
- Brainstorm hosts' and guests' expectations.
- Introduce homestay standards and consult with community members whether each standard is
 1. feasible,
 2. feasible with support or
 3. not feasible (+ reason).
- Agree on standards for homestays.
- When planning for homestay development, include time to link with supporting organisations / time for families to improve their home facilities.
- Form a community committee to check if individual families can meet the standards.
- Get feedback on the homestays and standards from a pilot tour. Use feedback to improve standards.

Delivering homestay training follows on from the brainstorms we have already had about tourist expectations, community pride and confidence, goal planning etc.:

- Homestay Principle
 - » What do tourists expect?
 - Proud / Concerned?
 - » What aspects of homestay are ready for visitors and what do we need to develop / improve?
 - How to reach our goals?



- What can we do ourselves?
- What kind of help do we need from outside organisations?
- Establish a local homestay standards assessment team.
- Establish maximum number of tourists for each house
- Agree booking and rotation systems.
- Establish guidelines for hosts and guests:

Visitors are requested to:

Remove shoes before entering the house.

Not drink alcohol.

Only speak softly after 10 pm.

Hosts are requested to:

Take time to meet and speak with guests.

Not watch TV or listen to music loud or late at night.

Not drink or invite guests to drink alcohol.

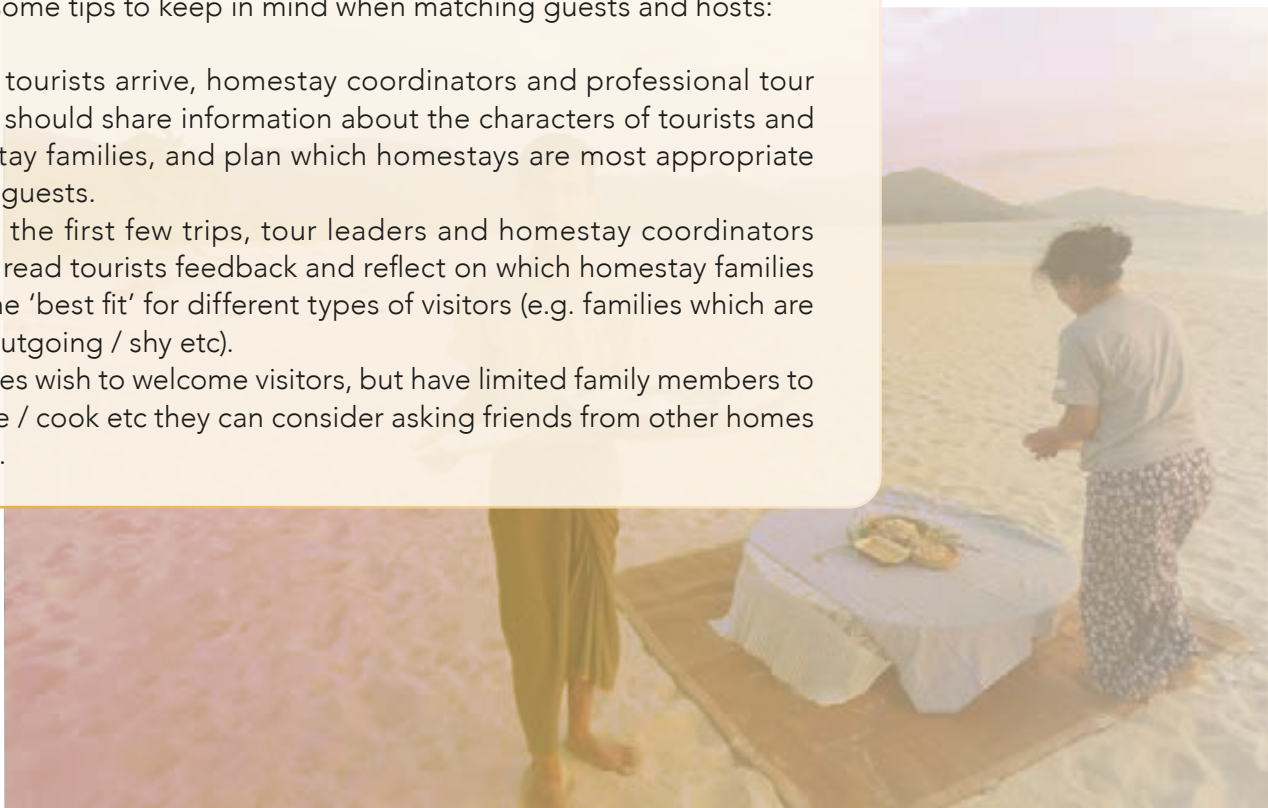
- Brainstorm options for cross-cultural exchange (use 'DO, LEARN, FEEL, SHARE)
- Train community members to meet, explain and present to their guests confidently
- Identify the best place and times of day for different activities (e.g. coffee spot in the morning, etc.).

Tips for Matching Guests and Host Families

It is important to match guests with suitable hosts to ensure the experience is enjoyable for everyone. i.e. you won't put an elderly couple in a homestay where there are young babies.

Here are some tips to keep in mind when matching guests and hosts:

- Before tourists arrive, homestay coordinators and professional tour guides should share information about the characters of tourists and homestay families, and plan which homestays are most appropriate for the guests.
- During the first few trips, tour leaders and homestay coordinators should read tourists feedback and reflect on which homestay families were the 'best fit' for different types of visitors (e.g. families which are more outgoing / shy etc).
- If families wish to welcome visitors, but have limited family members to prepare / cook etc they can consider asking friends from other homes to help.



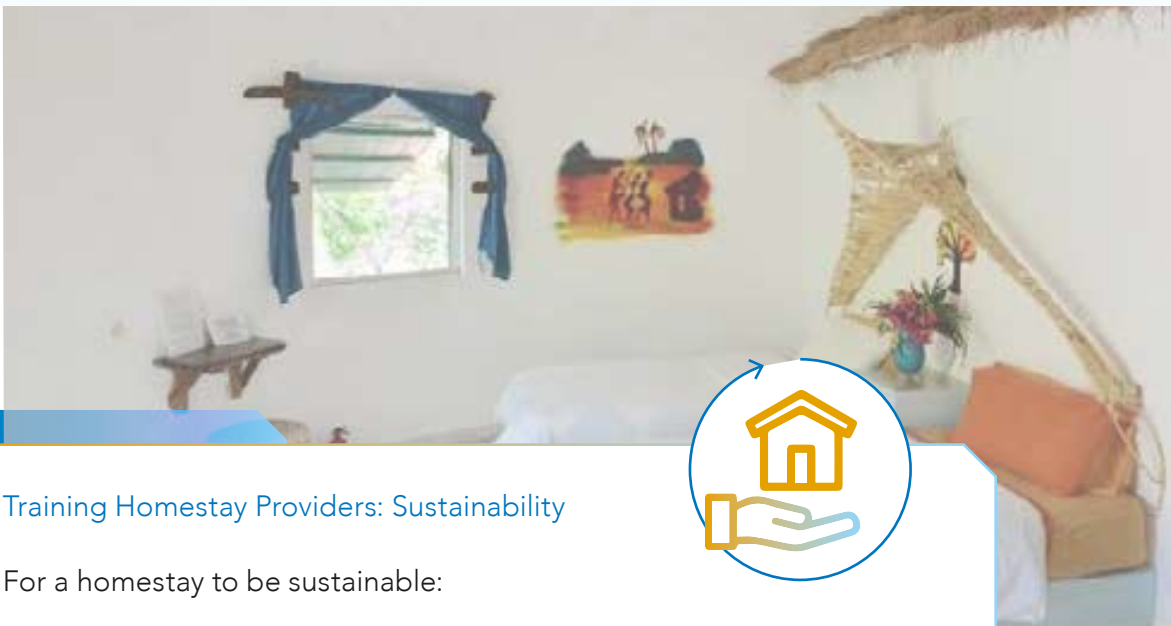
Tips for Eco Lodges



Eco lodges are a unique and interesting experience, but they come with challenges, and it is important to monitor them carefully.

These are some tips when running an eco lodge:

- A common complaint about ecolodges (promoted as CBT) is that tourists can feel 'abandoned' on their own in the lodge, without opportunities to interact with local people. Visitors staying in CBT ecolodge appreciate opportunities for cultural exchange. E.g. a local musician or storyteller should visit the guests in the evening.
- The lodge can create additional opportunities for local families to earn income through jobs (cooking, housekeeping, guiding) handicrafts, and artistic performance.
- The lodge can offer shares based on work. E.g. community members help to build the lodge and receive shares rather than labour wages.



Training Homestay Providers: Sustainability

For a homestay to be sustainable:

1. Homestay providers should work as a team to establish a homestay system.
2. Discuss, agree on and follow prices, to avoid internal competition.
3. Queue or rotation system.
4. Agree on the Tip system.
5. Discuss and agree on a contribution to the CBT community fund (if exists).
6. Develop a feedback form and schedule for monitoring progress.
7. Visitors book for guests to share their experiences.



BE PREPARED

Local food and accommodation are highlights of CBT. Success relies on local capacity. Initially, service providers will lack confidence. Plenty of practice and good feedback and on the job training will help them to improve. The facilitator should observe and comment on different stages of preparation and delivery. Then service providers practice again, taking into account feedback. Finally, after you have tested delivering the services several times, set a price for food, based on market costs, lost opportunity costs, any travel costs which are necessary to bring ingredients from local markets. When pricing accommodation, consider costs of preparing and cleaning accommodations.



Step 15: Develop CBT Activities and Souvenirs



Activities and souvenirs are an important part of tourism. They can create lasting impressions of the value and beauty of traditional skills and knowledge. Souvenirs can also provide great memories of the people and places which tourists encounter, leading to word-of-mouth recommendations.

Specific types of activities and souvenirs which are selected to develop will depend on the highlights in each community, and feedback from tour operators and tour guides.

Buying souvenirs allows tourists to support local skills, increase local pride, and support the local economy. In many cases, producing souvenirs for tourists has enabled local people to practice, maintain and even restore cultural heritage, and pass it on to the next generation. Souvenirs provide an important economic incentive to continue producing traditional crafts.

WHAT'S THE ISSUE?

Activities are at the heart of great experiences and memories.

While developing new activities, we must ensure that:

1. Community members feel comfortable to show visitors.
2. The activity is attractive to tourists, tour operators or other partners.
3. The activity is safe, or any risks can be managed safely.

In some cases, you will need to bring in external expertise to help develop these potential CBT products.



What tour operators really look for in a CBT experience

In Myanmar, tour operators were interviewed about their experiences of village-based tourism activities before and after this CBT process was implemented in the CBT project site.

Before CBT	After CBT
<ul style="list-style-type: none">■ Not sure about CBT, worried it may complicate existing tour programmes.■ Awkward experience in the villages, it felt intrusive and uncomfortable.■ Felt impossible to connect with local people.■ Communities were not benefiting from tourism.■ Villagers scared / lacked confidence with tourists.	<ul style="list-style-type: none">■ Fun, responsible experiences.■ Socio-cultural and economic benefits from CBT.■ Warm welcome and meaningful encounters between community members and visitors.■ No longer felt invasive.■ Many opportunities to discover authentic, local culture.■ Hosts happier and confident.■ Contributing towards human dignity and peace.

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Key elements which tour operators valued in a CBT experience included:

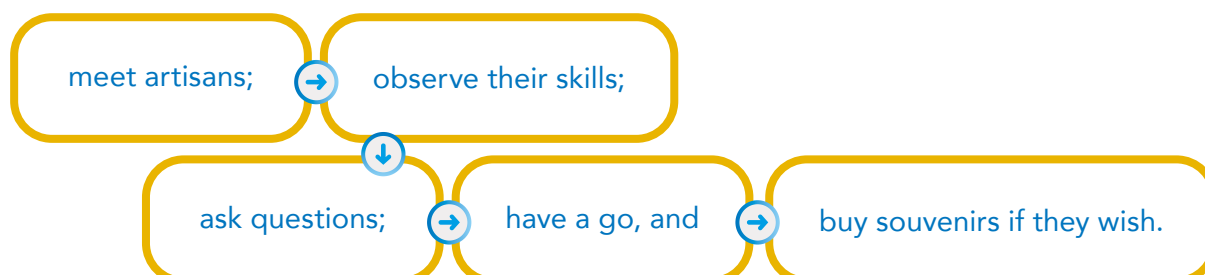
1. A warm, comfortable welcome
2. Interaction with local people
3. The chance for a hands-on experience
4. Benefits for the community



IN THE FIELD

Supporting organisations can help artisans to find a workable balance between preserving traditional, authentic designs; while also assisting community members to apply or adapt traditional designs in new and creative ways, which can meet modern needs and functions.

Tourists often enjoy hands-on experiences. This means that they have a chance to observe local people demonstrate an activity or skill, and then have a go themselves. Artisan visits can be great fun. Allow sufficient time for tourists to:



For example, they could try weaving, cooking, or playing a traditional instrument. The following kinds of activities could be developed into a hands-on experience:

- **Farming** activities, such as fishing, planting, or picking vegetables.
- **Musical** activities, such as playing an instrument or learning a local dance.
- **Culinary** activities, such as learning how to make a local dessert or snack.
- **Spiritual** activities, such as participating in a simple ceremony.
- **Personal** interaction, such as learning a few words of local language.



Whatever activities you focus on, make sure that community members feel comfortable and confident to share this aspect of their lives and cultures.

Also, make sure to check that activities are safe, including any equipment which visitors will need to use. Avoid activities involving sharp tools or heat.

Consider how valuable or expensive equipment or local crafts may be. Keep it simple. Do not let tourists 'have a go' at a tapestry which takes months to weave!

Here are some tips about how to deliver a good hands-on experience:

- On arrival, tell tourists what activity you will do and for how long.
- If appropriate, tell the story of the place or activity you will try.
- Present any equipment which the tourists will use (e.g. fishing nets).
- Do a demonstration and give safety tips as necessary.
- Give tourists the chance to ask questions before you start.
- Let tourists have a go at the activity if they wish.

Crafts and Souvenirs

Souvenirs are an important part of tourism:

1. They create lasting impressions of the value and beauty of traditional skills and knowledge.
2. Souvenirs can also provide great memories of the people and places which tourists encounter, leading to word of mouth recommendations.
3. Buying souvenirs allows tourists to support local skills, increase local pride, and support the local economy.
4. Producing souvenirs for tourists often enables local people to practice, maintain and even restore cultural heritage, and pass it on to the next generation.
5. Souvenirs provide an important economic incentive to continue producing traditional crafts.



There are some guidelines when providing souvenirs and crafts:

- The souvenirs are handmade by community members.
- The souvenirs are useful or functional.
- The souvenirs are beautiful.
- The souvenirs are lightweight and easy to pack, ship or carry.

Showcasing Local Products



Artisan experience showcase and adding value to local products:

- CBT Facilitators should help local community vendors:
 - » showcase their products;
 - » share how their products are made;
 - » create an impressive experience for tourists;
 - » create sales opportunities for vendors, and
 - » contribute towards the sustainability and innovation of local products.
- Language barriers may cause communication challenges:
 - » Local vendors can fall back on a hard-sell, which undermines the attractiveness and reputation of destinations.
 - » Part of our job as a CBT trainer is to help vendors sell their products, by designing a welcoming space, opportunities to interact, interesting presentations and reasonable prices.

Here are some actions which you can take to support a better experience for vendors and visitors:

- Train guides to introduce local vendors, their products and how they are made.
- Provide training in relevant safety and hygiene issues, to inspire confidence in visitors.
- Train local vendors to welcome tourists politely and avoid a hard-sell atmosphere.
- Produce attractive posters or pamphlets to show how local products are made.
- Produce stickers or tags with information about the product (ingredients, history, highlights, etc.)
- Produce language sheets, cartoons and other media to help break the ice.
- Train guides how to initiate simple exchanges between vendors and visitors, for example by teaching tourists how to greet artisans using local languages.
- Develop experiences (e.g. arts workshops) to elevate from 'product' to 'experience'.
- Help link vendors with hotels, restaurants or other partners to help sell their products.

Crafts and Souvenirs: Considerations

CBT facilitators are a useful tool in interactions between tourists and artisans. Facilitators can help achieve a balance between preserving traditional, authentic designs, and what appeals to tourists. They can also help the artisans to develop a range of marketable products.

CBT Facilitators can advise on product adaptations:

- Apply or adapt traditional designs in new and creative ways which can meet modern needs and functions, e.g. making laptop sleeves from local woven material.
- Small/light souvenirs are easier to carry and take back home in bags / on aircraft.
- Sizes may need to be adapted to physically bigger tourists. E.g. longer bag straps.

Preparation and training of the artisan and family:



1. Family members should be consulted in advance and agree to welcome visitors.
2. Train artisans how to present their crafts and beliefs / stories associated with them.
3. Train artisans how to demonstrate stages of production, and the different tools used during production. E.g. tools used to spin and weave cotton, carve instruments, etc. This helps tourists appreciate the value of crafts and motivates them to buy souvenirs.
4. The team should assist villagers to develop a range of marketable products.
5. To avoid misunderstandings, souvenirs should be clearly and consistently priced.

LTG's and tour leaders should explain to tourists that selling crafts gives local women opportunities to stay with their families, and earn a living, without needing to travel.



How to manage visits to elders and artisans respectfully

Both the local guide and the tourist group should respect the artisans by engaging with them in a polite and respectful way. Guidelines to follow include:

1. First introduce the artisan. Always ask the artisan direct questions, so that they can participate in the conversation, rather than being a passive object of interest.
2. The artisan demonstrates their special skill to the tourists.

3. The tourists have a chance to have a go / try their hand.
4. The tourists have a chance to ask questions to the artisan.
5. The tourists have an opportunity to buy a souvenir.

Training and preparing artisans

Here is a step-by-step process to identify and develop artisan experiences:

Step 1: Identify possible artisan experiences

1. **Survey community** to identify artisans, local handicrafts and activities with potential to develop hands on experiences or souvenirs to make the programme more attractive.
2. If raw materials are **expensive** or the crafting process is complex, it is better not to develop a hands-on experience.
3. **Identify good locations** to hold activities, for different sized groups. E.g. at home, in a community hall or workshop, etc.
4. **Prepare for the workshop:** photos and ideas.



Step 2: Raise Awareness: Workshop

1. Show photos with examples of different kinds of hands-on activities:
 - » What is the activity?
 - » What does the local guide have to prepare?
 - » What does the local guide have to do during the activity?
 - » What can tourists learn?
2. Explain to community members why tourists are interested in hands-on experiences and local souvenirs.



Step 3: Prepare the artisans

The workshop should include the following content and suggested processes:

1. Explain that a good artisan experience requires:
 - » A skilled and knowledgeable, and welcoming host.
 - » Good preparation by the artisan.
 - » Materials and tools are ready.
 - » Private place with no interruptions.
 - » Sufficient time for demonstration and chance to 'have a go'.
2. Show two pictures which show two different locations:
 - a. a place next to the road, which is not very private.
 - b. a more private house / space/ workshop.
3. Ask the question: Which is a better place for an artisan experience?
4. Consider how local crafts could be adapted as souvenirs and observe important cultural symbols which could be used to inspire new handi-craft designs.
5. Training artisans by following the guidelines of "How to manage arti-san visits".
6. Explain how to prepare workshops for tourism visits:
 - » Artisan's homes, or learning stations (e.g. community halls) should be clean.
 - » Prepare the equipment used at each stage of the production pro-cess in advance.
 - » Prepare enough equipment for several tourists to 'have a go' at the same time.
 - » If the production process is very long or confusing, prepare a photo album.
 - » Prepare a language sheet with greetings and useful words. This can help to break the ice between sellers and buyers, and make both sides feel happier and less awkward.
7. **Sales area:** If artisans wish to sell souvenirs, they should set up an at-tractive presentation on a shelf or table, and present this at the end of the visit. Never push tourists to buy.
8. **Communication and translation:** LTG's and tour leaders should always help to translate, so that tourists and community members can com-municate and do not lose interest in the experience.

BE PREPARED

Tourists searching for 'authenticity' can react negatively when encountering 'commercial' aspects of local life. Markets are an integral part of life in South East Asia and Africa, even in remote villages.

Many villagers have had extensive life experiences and lived challenging lives as refugees. They have limited choices and opportunities. Guides should gently manage tourists' expectations and [encourage tourists to respect how local people chose to make a living](#).

Summary Action Points: 'C' Craft

Design an attractive CBT program

- » Report back to community members on the three to five most popular CBT product ideas. These will be the priority experiences / products / services / for development.
- » Make sure you know your key markets so you can adapt tours to their needs.
- » A general tour offering a variety of experiences OR an in-depth, themed tour?
- » Success factors (e.g., highlights, hands-on, safety, flow, timing, 5 senses, time to rest).

Build capacity and systems to manage CBT:

- Establish a CBT Club, CBT Coordinator, Bookings and Accounts systems
- Agree the goals of CBT, and define roles, rules, and regulations for the CBT Club.
- Establish a system of regular, monthly meetings to monitor progress and challenges.
- Establish a Community Fund and a Committee to steer and oversee the CBT Fund.



Train local community tour guides:

- Local community guides have a crucial role in the success of CBT.
- Build skills through the simple 3S's training system: Safety, Story, Service (see page 69)
- Build confidence and delivery style using the 3C's: Clear, Confident, Caring.
- Develop a village map showing the CBT route and train guides to give a welcome briefing.

Train local hospitality providers:

- Identify interested community members and research seasonal menus.
- Provide training on a variety of seasonal menus, food safety and hygiene.
- Prioritise trainers who speak local languages / are able to provide tailored advice.
- Community members should practice introducing dishes, and the stories behind them.



Develop activities and souvenirs

- Help artisans to add value to their products by creating a memorable experience.
- Balance preserving traditional designs with meeting modern needs and functions.
- Develop a home visit to meet artisans, learn about their crafts, and 'have a go'.
- Train villages in a 'soft sales' approach, using presentations, real equipment, and local language cartoons. Show visitors how crafts are made before trying to sell products.









Module 5. Connect



Connect consists of the following steps:



Connect

“Join together so as to provide access and communication... Form a relationship or feel an affinity.”

(Oxford Living Dictionary)



In the last module, you learned how to design an attractive CBT programme, build capacity and systems to manage CBT, train local guides and food providers, and develop activities, with a focus on artisan experiences. Now, it is time to focus on market access. You have already been working and consulting with tour operators and guides since the early steps of CBT development. However, this module is a deep-dive into how to form win-win partnerships with tourism businesses.

By the time you will have completed this module, you will be able to:

Step 16: Calculate and agree on prices

WHAT'S THE ISSUE?

Tour operators promote their programmes in advance, and usually only change their prices one time per year. Therefore, communities which want to sell their CBT programmes through tourism supply chains

need to be able to guarantee fixed prices for at least 1 year. It is very important to establish prices which are good value for money, while also being good value for community members' time. This is a delicate balance.

IN THE FIELD

What do you need to know to deliver this training?

As a CBT Facilitator, you will have to have a broad understanding of a range of issue in order to deliver this step. These include:

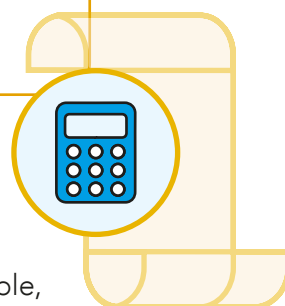
1. Principles for pricing CBT (e.g. value for money, competitive, etc.)
2. How to calculate a feasible price
3. Cost plus profit pricing
4. Value added pricing
5. What DMCs need to be able to sell CBT (value, annual price, etc.)
6. The 5C cycle for pricing CBT
7. How to negotiate with tour operators over prices
8. How to follow up and review prices (annual stakeholder workshop)



Principles of pricing

When calculating prices of CBT products, the following considerations must be kept in mind:

- **Viable and profitable:** it covers all your costs plus a mark up.
- **Competitively priced** compared with similar products.
- **Motivating to community members** - better than minimum or low wages.
- **Great value for money.** Tourists will pay more for a genuinely better product or experience. So, you need to think very carefully about how you will make the product more memorable, attractive, fascinating, beautiful etc.
- **Guaranteed price** for at least 12 months.



Other issues to think about or consider include:

- What will be included as 'standard'? Meals, water, equipment?
- Do you need to charge for a minimum number of guests? For example, stating that you are prepared to offer lunch to a minimum of 2, 3 or 4 guests.
- Will the seasons affect your availability?
- Discounts / Free of Charge for professional guides or drivers (FOC)?
- Will you offer discounts for groups, children, seniors, early booking, etc.?
- Make sure the price is still attractive after Community Fund deductions
- You may wish to add a percent to the price to offer as a sales commission

In the field

The 5 C's system to identify a competitive, good value price:

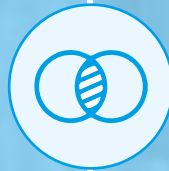
Calculate:
ground costs and
'ballpark' profit

Compare:
is it com-
petitive in the
market?

Create:
how can you
add addition
value for
money?

Consult:
value for time
and money for
communities and
partners?

Confirm:
fixed price for
the season



Calculate: ground costs and 'ballpark' profit

1. Survey and confirm the normal day rate for labour in the community.
2. Calculate the full costs of delivering your product: raw materials, transportation, labour, repaying debt, and any maintenance costs.
3. Identify an attractive profit margin. This could be a % (e.g. add 10%) or a fixed cost per item or per order (e.g. add 25 cents per meal).
4. Define the price. e.g. full costs \$3 USD + 10% = \$3.30 USD.

Compare: is it competitive in the market?

1. Survey where you can find a comparable product in the local area.
2. Identify a high price point for the product (e.g. the cost of a meal in an expensive hotel) and a low price point for the product (e.g. the cost of the same meal in a local market.)
3. Identify an average or common price for the product (e.g. what people consider to be a 'normal' price).
4. Also ask 5-10 tour operators or professional, licensed tour guides what they consider to be a normal, fair price for a similar meal, activity, etc.
5. Compare your draft price from the 'Calculate' step with the high, low and 'normal' price points.
6. Are your draft prices high, low or average?

Here is an example from the popular Gambian dish, domoda



Create: how can you add additional value for money?

Look at the two photographs of domoda below.

Restaurant A



Restaurant B



- Which dish do you think is more expensive?
- Which dish would you be prepared to pay more for? _____
- How has the Restaurant B increased the value of Domoda? _____
- What factors would make you decide to eat the dish from Restaurant A? _____

Of course, different people have different tastes. Neither of these presentations are 'correct' or 'incorrect'. However, we can say that if the flavour of the two dishes is similar, Restaurant B will generally be able to charge a higher price than Restaurant A, because they have added value through attractive presentation. However, if the price of Restaurant B is very expensive, customers may feel that Restaurant A is much better value for money, then Restaurant B will lose customers to Restaurant A.

As a facilitator, your job is to help the community members identify ways that they could add value to their products and charge a bit more without losing customers. Here are some things to think about:

Add-ons:

- Think about what could be added to a simple product to create a more interesting, valuable experience for the tourist.
- This results in a higher price being able to be charged so long as the tourists gets good value.


Ideas:

- Using the senses e.g. tasting
- Experiencing
- Additional outing
- Music or dance



Consult: value for time and money for communities and partners?

1. Design and re-calculate the costs of two versions of your product: a simple option for a lower price, and a more luxurious option for a higher price.
2. Consult with CBT service providers carefully, thinking in detail about the time and effort which it will take to deliver each option. Adjust your price if necessary. Community members must feel genuinely satisfied with the price, or they will not be motivated to continue with CBT.
3. After you have considered different ways to add value, practice, take some photos and write short descriptions of the proposed products and prices.
4. Send these ideas to at least 5 tour operators which you contacted in earlier stages of CBT development. Explain that you are trying to define a price which is attractive and feasible for community members, business partners and tourists. Ask for their honest feedback on your products and prices



Confirm: fixed price for the season

Finally, identify the product option and price which is the best balance between the needs of community members and partners. This may take some time. It is better to take time agreeing a viable price, than rush to propose a price which will not be feasible and sustainable in the future. The price should be guaranteed for 12 months.

Additional tips for calculating prices:

1. During the first year, consider adding a small buffer of 5 % to your prices to allow for any mistakes or unforeseen changes in the prices of raw materials.
2. Always test prices. Community members should practice. Make sure that community members are satisfied with the price, after testing it.
3. Be clear about tourists' expectations for service. Always use tourists' service expectations as a foundation for calculating prices. Do not use villagers' expectations. e.g.: Local people may enjoy eating fatty meats, but tourists do not. Removing fat may increase the costs of meat.
4. Clarify exactly what is included or free. e.g. fruit from villagers' orchards?
5. Consider the impact on prices if materials must be brought from outside the village (e.g. the market). Make sure that the price will cover your costs.
6. If local guides regularly stop to meet an important local leader, herbalist, shaman, etc. who is not a CBT service provider consider giving this person a contribution for their time at the end of the year, from the CBT Fund.

BE PREPARED



Always include community fund contributions when considering costs and prices. Community members may be satisfied with profit based on income minus expenses but may not be satisfied if an additional 10% is deducted. Consider any investments which must be recovered from the cost.

A photograph of a woman and a man in a blue shirt looking at a tray of food on a table. The woman is on the left, wearing a grey t-shirt, and the man is on the right, wearing a blue shirt. They are both looking at a tray of food on a table. The tray contains several small jars and a bowl of food. The background is slightly blurred, showing other people and a table. The image has a blue and yellow color overlay.

Step 17: Engage and support Local Ground Handlers



WHAT'S THE ISSUE?

The term 'Local Ground Handler' (LGH) refers to tour operators at the state or provincial level. Their offices are usually located in the nearest tourism destination to the CBT communities. They operate tours and arrange services for major national tour operators, also known as Destination Management Companies or DMCs in major commercial centres like Bangkok and Banjul. They also offer tours to FIT travellers, who arrive in destinations independently by plane, bus, ship, etc.

Local ground handlers are crucial to the success of CBT. They are located close enough to the communities to be able to develop long-term, trusting relationships with community members. They can help to support / backstop CBT while community members gain capacity and experience. Involve LGH's in CBT development as soon as possible. This familiarises them with the CBT programmes and builds trusting relationships with community members.

Crucially, ground handlers are often small or medium sized local businesses, which may have little experience in the international tourism industry. Therefore, wherever possible, CBT trainers should consider how to support these ground handlers to build capacity across product development, operations, and marketing.



IN THE FIELD

To be able to build lasting and useful relationships with local ground handlers, you need to find out:

- 1** The names, profiles and target markets of local ground handlers.
- 2** Contact details for local tourism associations or government offices.
- 3** Particular challenges for tourism in the local area.
- 4** Updated information on market demand for CBT at national / regional levels.
- 5** Case studies or examples of how CBT can benefit communities, tourists, and businesses in destinations.
- 6** Techniques for requesting feedback from ground handlers as CBT products.
- 7** Specialist training – you will usually need outside support for this. e.g.: functions of tour operators, how to pitch CBT to national TOs and DMCs.

How to engage and support local ground handlers?



Some simple actions which CBT supporting organisations and trainers can take to build ground handlers' understanding and support for CBT include:

- Introduce yourself to local ground handlers as soon as possible.
- Organise a presentation on 'what is CBT?', including successful examples.
- Share information on market demand for local experiences and responsible tourism, and the expectations of national and international tour operators for local partners. This will provide an incentive for LGH's to become interested in the project and CBT.
- Invite ground handler staff to join ongoing CBT field training and meetings.
- Request feedback from ground handlers as CBT products are developed and tested.



Build the capacity of the ground handlers to reach markets:

Local ground handlers often face their own significant challenges. They may need training and access to networks to be able to promote and sell CBT.

1	Learn about ground handlers' successes and challenges trying to promote their products to tourists and tour operators.
2	Learn about their training needs and what their existing networks are.
3	Organise training or study tours to build ground handlers' capacity and motivate them to support CBT. Be prepared. Training may need to be very simple. E.g. building knowledge and skills across the basic Tour Operator functions of: <ul style="list-style-type: none">a. product development and contractingb. sales and marketingc. operationsd. admin and financial systems
4	If national tour operators visit your destination, for a FAM or inspection visit, organise table-top meetings, inspections etc. so that ground handlers can network, present their businesses, and meet potential business partners.

Questions for understanding potential partners:

- What kind of tours do you specialize in?
- Please tell me a bit more about your main target tourists? (Group or FIT? Ages? Nationalities? Special interests? Special service needs?)
- What kind of experiences are your (your clients) looking for in (the destination where you are developing CBT), but can't offer yet?
- Are our activities / services a good match for your target groups?
- Can you easily include our product / service into your current programmes? Opportunities and challenges?
- How can we make it easier? What could be improved / adjusted to make our products more attractive to your target markets?



CASE STUDY: TOUR OPERATING STUDY TOUR TO YANGON FOR LOCAL, LOIKAW GROUND HANDLERS

In the other direction along the supply chain, a study tour was organized for local ground handlers, licensed tour guides and local community representatives, to visit Yangon, Myanmar's commercial hub, and broaden their knowledge about Myanmar's tourism industry. The program provided participants with unique insights into the tour operating business, ground handling standards, how to improve marketing-promotion, and how to implement sustainability best practices. The study tour also strengthened cooperation between tour operators and local ground handlers and communities.

The study tour included the following activities:

- Visit to national associations (UMTA) and tourism promotion organizations (MTM)
- Presentation on the roles of associations and the benefits of association membership
- Training on tour operating (focusing on functions by department) and tour guiding.
- Discussion of the expectations which DMCs have for LGHs, LTGs and CBTs.
- Discussion on the expectations which community members have for business partners.
- Discussion of the positive impacts of tourism, CSR and how to increase positive impacts.
- Discussion of the negative impacts of tourism, CSR and how to reduce negative impacts.
- Visits to specific tour operators to learn more about day to day work in each department.
- Site visits to major tourist attractions to observe site management techniques.
- Site visits to social enterprises to understand SE philosophy, products, and target markets.
- Participants had the opportunity to 'feel like a tourist by joining tourist activities'.
- Participants experienced 'culture shock' by eating pizza in downtown Yangon!





BE PREPARED

A very effective way to contact local ground handlers can be through local associations, which can communicate with all of their members. Sometimes, these local tourism associations are active, helpful and a pleasure to work with. On other occasions, association members may be wary or cynical about the success of CBT projects, and the value of investing their time. Sometimes, associations are highly political with internal conflicts. Try to stay positive.

Make personal visits to get to know association leaders, and other active members. Build relationships and request support to contact association members. As necessary, start working with a pilot group of active, local ground handlers. Keep project doors open for additional tour operators to step in.



Step 18: Train Licensed Tour Guides

WHAT'S THE ISSUE?

Tourists usually arrive in the community accompanied by a licensed tour guide. Licensed guides usually come from the national capital, or another important tourism hub. Or they work at the destination level. For example, regional licenced tour guides at state level. Licenced guides play an important role in CBT because of their language skills and understanding of tourists' needs.

IN THE FIELD



Strong teamwork between community and licensed tour guides is an essential success factor for CBT. The roles of professional, licensed tour guides and community guides are quite similar. Local community guides are responsible for leading the CBT programme in the community, storytelling and coordinating with local service providers like cooks and artisans. Professional tour guides are responsible for the overall safety and enjoyment of their customers. It can be challenging for professional tour guides to trust local community guides and give them the necessary space to do their jobs. Cooperation needs to be built and managed sensitively. This unit focuses on how the CBT trainer facilitates this cooperation.

To succeed, CBT Facilitators need to know:

1. Potential points of cooperation and conflict between licensed and community guides.
2. Updated information on market demand for CBT.
3. How licensed tour guides can benefit from CBT.
4. How licensed tour guides can work as a team with village guides / CBT staff to deliver great tours.
5. Specific legal responsibilities of licensed guides.

Responsibilities of Community Guides and Licensed Tour Guides

Professional guides and community guides have similar roles but slightly different responsibilities:

Local community guides are responsible for:

- Leading the CBT programme
- Storytelling
- Coordinating with local service providers

Professional tour guides are responsible for:

- Overall safety and enjoyment of their customers



Training for professional, licensed tour guides



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In order to work effectively with local community guides, licensed tour guides need to understand, experience and practice::

1. How CBT is different from regular sightseeing trips.
2. What roles local people play in delivering CBT.
3. How to adjust their role to work as a team with local CBT staff, while continuing to be responsible for the safety and satisfaction of clients.
4. How to use CBT systems, such as bookings, receipts, etc.
5. The progress of initiatives like community fund.



Before licensed guides can be trained, the CBT Group needs to have:

- Clear CBT programmes and prices.
- An effective CBT communication and booking system.
- Benefit sharing (organisation, rotation, community fund).
- Trained local staff (food providers, local community guides, etc.).
- Consensus of the story at each important interpretation point on the tour.
- Some experience testing their services and activities.
- Local community guides need to have practiced and be quite confident.



Before licensed guides can be trained, you must brief community guides about:

- Who are professional licensed tour guides? What is their job?
- What kinds of misunderstandings may occur between the different guides?
- How community tour guides and professional, licensed tour guides can cooperate to avoid conflict and deliver great experiences for guests.
- Which places, people and activities are included in the training programme?
- How local community tour guides and professional, licensed tour guides will share their roles during welcoming visitors and leading the tour.
- Why it is so important that the two types of guides work as a team.

Successful training combines classroom and field sessions, so both of these must be included in the training event.

Classroom training for professional tour guides takes half a day, and should include:

1. A quick overview of the CBT programme, to give context to the training.
2. An overview of market demand for authentic, local experiences.
3. What is community-based tourism? How is it different from sightseeing?
4. An overview of the work done so far to develop CBT in the destination.
5. Consider how employing local community guides creates better experiences for tourists, and benefits for the local tourism industry?
6. Opportunities for licensed tour guides who have expertise in CBT.
7. How local community tour guides have been trained (the 3Ss).
8. Why licensed guides and community guides need to work as a team?
9. Potential challenges to smooth cooperation to deliver the 3Ss?
10. How professional and community guides can work as a team.

CBT Training for Professional Tour Guides: Field Training

Field training allows professional guides to:

1. **Experience** the CBT programme.
2. **Practice** working as a team with the community guides.
3. **Learn:** get to know the local area and what to expect on location.



Field Training Preparation

Give the licensed guides a learning assignment to find information that they normally need to know in advance:

- What is included in the CBT programme, services, times?
- Why are the community interested to welcome guests?
- What do local people feel very proud to share with visitors?
- Are there any special rules, taboos / do's don'ts?
- Who are the coordinators / community guides?
- What time and where should they meet community guides?



Field Training Delivery

Both local and professional tour guides will need to support the 3S's of Safety, Story and Service. Specifically, professional tour guides will need to support the 3S's as follows:

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Safety

1. Be familiar with any risks or dangers which may occur during the CBT programme.
2. Find out how community members plan to manage these risks.
3. Share information about customers' health issues with local guides.
4. Consult with local guides in the case of dangers or an emergency.
5. Ensure that tourists follow important instructions when requested.

Story

1. Learn about the most important people / places in the programme.
2. Learn about rules, cultural taboos / do's and don'ts / Codes of Conduct.
3. Explain to tourists they should expect that local community guides will stop to tell stories and give information about important local people and places.
4. Introduce local guides to guests, and always keep them involved in the conversation. Don't Talk about people – Talk to them. Use questions.
5. Help to encourage customers to listen to the local community guides.
6. Help local community guides by translating their stories into English.
7. Help to translate customers' questions for community guides to answer.

Service:

Be familiar with CBT staff, tour timings, routes, food and toilet stops. **1**

Brief tourists on the schedule, mealtimes, toilet breaks, etc. **2**

Share information about dietary requirements, allergies, etc. **3**

Inform local community guides if guests are getting overtired. **4**

Help to solve problems, and backstop community member. **5**

Organise a field training, for professional tour guides to experience the CBT programme, and practice working as a team with the community guides. **6**



Preparation: assignment

Before heading to the community, give the licensed guides a learning assignment.

- 1** Give the licensed guides a learning assignment to find information that they normally need to know in advance:
 - » What is included in the CBT programme, services, times?
 - » Why are the community interested to welcome guests?
 - » What do local people feel very proud to share with visitors?
 - » Are there any special rules, taboos / do's don'ts?
 - » Who are the coordinators / community guides?
 - » What time and where should they meet community guides?
- 2** Organise the professional guides into three small groups, to observe and provide feedback on Safety, Story and Service.
- 3** In the field, these groups take turns being 'tourists' while other group practices helping community guides translate.
- 4** Inform the licensed professional guides in advance which points they will be responsible for helping to translate.





On arrival in the community

There are some tips for managing a smooth arrival. Guides should practice:

1. Tell tourists the location of the meeting point and toilet immediately when they arrive.
2. Give them a 'Ten Minute Toilet break'. This gives tourists the chance to go to the toilet and gives the professional licensed tour guides and community guides to update any information.
3. Introduce tourists to the local community tour guides.
4. Ask tourists to listen to the 'welcome briefing' and help to translate.

After this, the licensed tour guides will follow the CBT programme, taking turns helping the local community guides to translate. At the end of the CBT tour, hold a feedback session for the guides to reflect what they have learned about how to cooperate.

Local tour delivery and conclusion



1. Together, the guides will follow the CBT programme.
2. The local guide will deliver local content.
3. The licensed guide will translate if needed.
4. At the end of the CBT tour, hold a feedback session for the guides to reflect what they have learned about how to cooperate.



BE PREPARED


Manage the expectations of the guides so they know that all aspects of the CBT tour will not be perfect in the beginning. Practice makes perfect. Be aware that there is a 'freeriding' risk associated with training licensed guides.

Some licensed guides may decide to lead their own customers along the CBT routes without using community tour guides. This undermines trust and motivation of the CBT members, and is ultimately damaging to CBT. This is very difficult to manage. The best solution is that the community members cooperate and insist that licensed guides book in advance and are always accompanied by a community tour guide.

If professional licensed tour guides don't use CBT staff:

- Tourists will not be well prepared when they arrive.
- The experience won't be as good for visitors, which will affect feedback.
- There may be confusion, and even conflict due to disrupting queues.
- Community members won't benefit as much from tourism.
- Eventually, villagers will become unhappy: Lose-Lose for the destination.





Step 19: Promote CBT to DMCs with a 'whole destination' approach

WHAT'S THE ISSUE?

Competition at national and international level is between countries and destinations, not between communities and businesses. If tour operators do not know your destination, they will not be interested to promote your CBT tour. Therefore, a useful strategy to promote CBT is through promoting the whole destination, with CBT as a core part of the offer. Clearly this will take skills, contacts and resources. If you do not have these yourself, you will need to coordinate with responsible government offices, tourism associations or NGOs to support you.

For promotion to be successful, you will need to build relationships with tour operators at the national level, building on your initial consultations. Throughout the CBT development process, you should keep in touch regularly with these tour operators, providing updates, and meeting face-to-face if possible.

A key strategy to encourage tour operators to include CBT in their B2B offer is to promote the hub destination closest to your CBT site. A useful tool to achieve this is a Sales Manual for Tour Operators, which provides detailed information on hotels, guest houses, restaurants, activities in and around the area (including CBT), and practical information on banks, hospitals, etc. This allows tour operators to visualize 'the whole offer'. The destination approach can be reflected in the design of Familiarisation (FAM) trips, which are offered for tour operators to travel to new destinations. In addition to visiting the new CBT sites, include activities such as table-top networking and promotion sessions for all local CBT tourism supplier groups, so that national level DMCs can meet everyone they needed to craft a programme.

IN THE FIELD

What you need to know to be able to lead and facilitate this process:



The main idea behind a 'whole destination approach' is that most travellers will not visit your area only to visit a CBT. Therefore, you need to promote and sell the whole destination, with CBT embedded as a key highlight.

To do this, you will need to know:

- Information on all key tourism suppliers in your destination: hotels, restaurants, transport, etc.
- Information about different kinds of activities available inside and outside / surrounding your destination.
- Information on how your destination and CBT can be conveniently connected through tourism routes and packages between destinations.
- How to share information effectively, especially during face-to-face sales presentations and online networks.
- How to prepare and deliver a successful FAM trip.

Promote, educate, and motivate DMCs to be interested in the CBT Project

1. Partner with national tourism associations and government to organise product presentations for members (many are usually tour operators).
2. Use e-mail and personal visits to update tour operators regularly.
3. Invite tour operators to join site inspections and FAM trips.
4. Provide tour operators with good quality product descriptions and photographs.
5. DMCs cannot create a programme based only CBT. They need information on hotels, restaurants, etc. Create a Sales Manual with full information on services in the destination.



Destination Sales Manual

A sales manual is a key tool to provide destination information to tour operators and DMCs. Key information in a Sales Manual may include, for example:

- » Background history and culture of the area/destination.
- » Hotel and guest house information.
- » Restaurant and cafe information.
- » Local experiences in the town.
- » Natural and cultural experiences around the town (CBT is part of this).
- » Contact details for local ground handlers and professional tour guides.

What information should be included for hotels?

- Short, attractive introduction and great photos: seven inside and three outside.
- Highlights that WOW the guest (beautiful view, great location, decoration, etc.)
- How many rooms and room types does the accommodation offer? (Standard, superior, double, twin, family, etc.). Extra bed charges?
- Facilities (E.g.: air conditioning, hot water, TV, wi-fi, swimming pool, rooftop bar, meeting rooms, gym, spa, tea and coffee, massage, sauna, etc.?)
- Price range (single / double).
- Are credit card payment and contract rates available?
- Address, telephone number, website, email and social media.
- What languages do the staff speak?



Organising a Familiarisation (FAM) Trip

One of the most effective tools to motivate tour operators to sell your product is a familiarisation or FAM trip. A FAM trip allows you to promote your new products, and to gain valuable feedback, which can be used to improve CBT products. It's recommended to organise FAM trips in cooperation with a tourism association or a government tourism organisation (e.g. ministry or tourism board).

What information should be included for restaurants?

- Short, attractive introduction about the type of food (local, French, etc.)
- Great photos (2 inside / 2 outside / 4 top 'signature' dishes)
- Ambience of restaurant (traditional, modern, local, beachfront, quiet, busy)
- Recommended menu / dishes.
- Opening days and hours.
- Size: can it accommodate small (1-10), medium (11-20), or large groups (21+)?
- Any other services (meetings, functions, karaoke, events, etc.)
- Is credit card payment possible?
- Address, telephone number, website, email, and social media.
- What languages do the staff speak?



Preparing for a FAM Trip

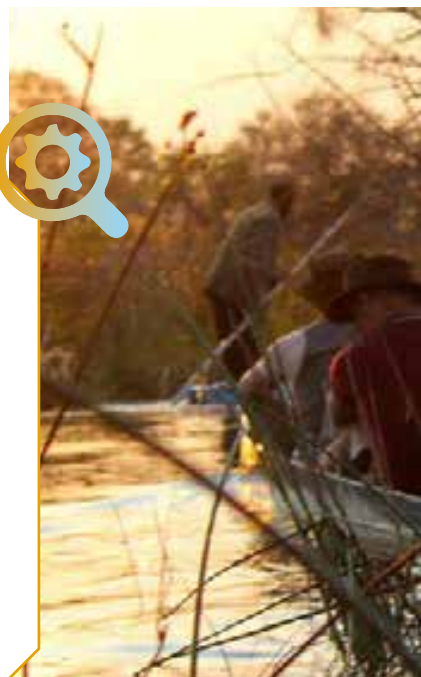
Some elements to think about when preparing for a FAM trip include:

1. Identify tour operators with an interest in cultural tourism and your destination.
2. Prepare an attractive one to two page overview of the FAM programme.
3. Complement your CBT product presentation with general information about the destination: accommodation, transport, restaurants, banks, hospitals, etc.
4. Inform and invite tour operators to attend the FAM at least 3 months in advance. Be sure to invite decision makers. Set a deadline for RSVP.
5. Provide a deadline. Follow up and remind DMCs of the invitation at least two times.
6. Be clear about what is included and what the tour operators will need to pay for.
7. Set a clear limit to the number of participants and communicate this clearly.
8. Close to the dates of the FAM, prioritise your follow up to DMCs which specialise in cultural tours / have a particular interest in responsible tourism / CBT.
9. Provide clear information about meeting places and times, how to travel from airport / bus / train stations to the meeting point and any transfers provided.

Delivering a FAM Trip

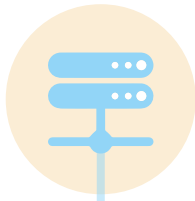
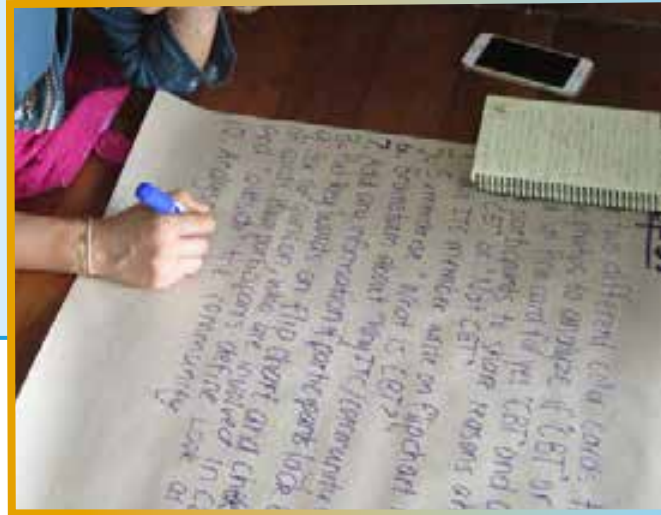
When delivering a FAM trip, do the following:

1. If possible, meet participants from their flights.
2. Organise a welcome dinner and introduce the FAM programme.
3. If necessary, divide participants into small groups to ensure an intimate experience.
4. Provide opportunities for participants to participate in activities.
5. After the site visit, organise a wrap up session to listen to tour operators' feedback.
6. Don't only focus on CBT. Organise hotel inspections, tabletop networking etc. to give DMCs an opportunity to meet potential local partners (hotels, tour operators).
7. Ensure that tour operators know who / which companies to contact to book a tour.



Following up a FAM Trip

- Contact all tour operators to thank them for participating in the FAM trip.
- After approximately 3 weeks, contact the tour operators again to follow up progress and ask if they require any further assistance or contacts, to be able to offer CBT.



Tabletop networking for local ground handlers and national DMCs

Try to organise a table-top networking session between local ground handlers or even product owners, and the tour operators or DMCs on the FAM trip. During tabletop networking, a large number of tour operators and tourism suppliers have short meetings, usually lasting from five to ten minutes. Table-top networking is a convenient way for tour operators to meet many local suppliers quickly. Suppliers can learn about tour operators' trip style and customers. Tour operators can learn about suppliers' products, services, and experiences. Following these meetings, buyers and sellers can decide who they wish to work with.



Preparation

1. Advise ground handlers to prepare promotional materials, and name cards and a short five to eight-minute pitch, supported by nice photos.
2. Coach the ground handlers to prepare brief and attractive presentations. Ground handlers have 7 minutes to make introductions, learn more about the tour operators which they are talking to, and recommend a small number of the most appropriate products and services.
3. Practice pitching to each other and improving presentations.
4. Contact tourism associations.
5. Inform local ground handlers and other businesses about the opportunity to meet national tour operators.
6. Organise a preparatory meeting with ground handlers and other local tourism businesses.
7. Clarify the role which ground handlers and national tour operators play in international tourism supply chains.
8. Present the importance of sustainable / responsible tourism to developing and maintaining attractive destinations, and the trends in demand towards local experiences and environmental concern.

Implementation

1. Brief DMCs on the design of tabletop networking in advance
2. During networking, each ground handler has a table. Every eight minutes, the facilitator rings a bell. DMC representatives move to a new table, meet the ground handler, and exchange business cards, the ground handler presents. The DMC shares information about their trip styles and clients' needs. The businesses agree on 'what's next?'
3. Ground handlers should make notes on each meeting, including the name and style of each national tour operator, notes on their clients' needs, notes on their response to different products, and notes on any agreements or follow up which was agreed during the meeting.



Tips for recording meetings

Advise the local ground handlers or product owners to do the following:

Make short notes of all meetings, insights, and agreements made by each party.

1

To have results from your participation, follow up your meetings and agreements.

2

Try to present offers which are adjusted to meet the needs of the DMCs.

3

Additional tips for successful tabletop networking sales presentations

You don't have much time in sales meetings so make the most of it. You can't make a good recommendation to a potential client if you don't know what they need. So, always start a meeting by learning about the company which you are talking to, then suggest a small number of your most appropriate products, which are just right for them.

You don't need to include all the details of your products and services. Be focused. Give enough information to make them interested to learn more.





Questions for Tabletop Networking

Questions to ask DMCs:

- What **kind of tours** do you specialise in?
- Please tell me a bit more about your **main target tourists** (Group or FIT? Ages? Nationalities? Special interests? Special service needs?)
- What kind **of experiences** are your clients looking for in XXX (the destination where you are developing CBT), but can't offer yet?
- Are our **activities / services** a good match for your target groups?
- Can you easily **include our product / service** into your current programmes? **Opportunities and challenges?**
- **How can we make it easier?** What could be improved / adjusted to make our products more attractive to your target markets?

Follow up

Local ground handlers should follow up as soon as possible (within 48 hours) to say thank-you for the meeting and clarify the follow up.

Case Study of the NTFIII Project: Create a destination buzz in the market

Hundreds of destinations around the world are competing for the attention of different tourism markets. Some destinations focus on family travel. Other destinations focus on winter sun, sports, art and music. Every destination has competitors. To stand out from competing destinations, and get noticed, is increasingly challenging.

Some of the key activities which were implemented by the team to create a buzz included:

1. Branding support for Myanmar: The NTF III team developed a tagline for Myanmar, evoking the excitement and mystery of a new destination - Myanmar: Let The Journey Begin. National branding guidelines were developed, to help create a distinctive positioning in the market. Training was delivered on how to roll out the brand. The brand was used at the national Myanmar stand in international tourism fairs, and gained significant interest among international tour operators and media
2. Stage events and press conferences at major EU tourism fairs: Participations in international tourism fairs were enhanced through a full programme of events and press conferences, supported by H.E. the Union Minister of Hotels and Tourism. Presentations were made to mainstream tour companies at major events, and to niche, cultural, responsible and eco-tour operators at high-profile side events. Presentations were designed to be simple with powerful, attractive messages
3. Product presentation roadshows in key target markets: The team organised roadshows in Scandinavia. Scandinavia was identified as a promising market for Myanmar due to high interest in cultural tourism, and relatively low saturation and competition compared to the most mature EU markets (e.g. UK, Germany, Holland)
4. Product presentation roadshows in key target markets: The team organised roadshows in Scandinavia. Scandinavia was identified as a promising market for Myanmar due to high interest in cultural tourism, and relatively low saturation and competition compared to the most mature EU markets (e.g. UK, Germany, Holland)
5. Press FAM trips: The team welcomed several journalists from high-end newspapers, radio and guidebooks. In each case, contacts were made at the EU trade shows. Having Kayah experts at the EU trade shows helped to add depth to discussions with journalists, who were eager to visit Kayah. Key lesson: when organising a FAM trip for tour operators, it is common for tour operators to travel as a group. However, when organising media FAM trips, each journalist has a particular interest or angle. They require long periods of time with specific individuals to conduct interviews. Therefore, it is more effective to invite journalists individually than together in a group

BE PREPARED

New, emerging destinations and established destinations which already welcome large numbers of visitors create different kinds of marketing challenges. In emerging destinations, there is often excitement and demand for new products, which is an advantage for new CBT initiatives. In established destinations, there will be more competition. Prices will often be much more sensitive. Tour operators may be less interested in new products. When trying to link new CBT programs

to tour operators in established destinations, FAM survey trips are very important, so tour operators can see how CBT is different and better. Tour operators will be familiar with local hotels, restaurants, etc, so you can offer a shorter FAM trip, for example only 2 days focusing on CBT.



Step 20: Engage and support national level DMCs



WHAT'S THE ISSUE?

In the past, the product managers of international tour operators used to travel overseas regularly to find new products. Nowadays, DMCs are increasingly regarded as the experts on destinations. They are expected to follow market trends closely, to identify new products, and send creative proposals to their partners overseas. DMCs, based in major commercial centres, are now the central hub of the supply chain. They buy products from local ground handlers and sell them to international tour operators. If you have the resources, an effective strategy to catalyse sales is to support DMCs to market and sell CBT products successfully to European or other target tour inbound operators.

In practice, these activities will be carried out by highly experienced professional consultants. Nevertheless, it's useful to have an overview of key actions:

- Helping DMCs to identify target markets and tailor products and marketing towards target markets'.
- Support for developing tailor-made export marketing plans for DMCs.
- Support for DMCs at international tourism fairs and roadshows.
- Support to improve sustainability performance through schemes like the EU Travelife for Tour Operators.

That said, there are generally two types of DMCs:

» **Category A:** highly experienced, possibly owned or managed by people with similar demographics to the international target market (ex-pats). They are comfortable with international travel, regularly attend trade fairs, have good marketing system in place.



» **Category B:** often may be local/nationally owned. They are less experienced, starting to expand, may need some support.

This section gives some ideas for the CBT project to extend support to these Category B DMCs if the project has the resources, scope and capacity. This step is therefore optional, but useful to know and understand for any CBT facilitator. If the CBT project does not extend this far, then a recommendation would be for the national DMO to provide this type of support to emerging local DMCs as a separate project.

Note that this will help to build strong links in the national tourism value chain/distribution channel to the benefit of the national tourism industry.

IN THE FIELD

Choose partners carefully



It important to work with international tour operators and other companies that have similar values and objectives to the CBT project. To find out if there is a good fit between the CBT and potential partners:

- Research the DMCs.
- Check that their principles are aligned with yours: CBT, Responsible Tourism, etc.
- Learn about their successes and challenges in selling their products.
- Learn about their training needs and what their existing networks are.
- Identify which Cat B DMCs to work with.

The ITO Product Development Cycle

It is important the DMCs learn about and know where they Acan engage with ITOs during the ITO product (tour package) development cycle.



The product development and promotion cycle of ITOs is usually annual. Medium to large operators will start the process of surveying and selling new products 1–2 years in advance.

There is often a mismatch in timing between when ITOs are looking for new products, and when they receive proposals from the ground via LGH/DMCs. There is a **small window of opportunity** when ITOs are researching new products to include in their packages. Another opportunity is that ITOs often complain that they don't get interesting products from the local DMCs.

To benefit from these opportunities, DMCs need to get product information to these ITOs at just the right time. There are two ways of doing this:

1

Meetings with ITOs

2

Trade Fairs (such as Akwaaba African Travel Market or World Travel Market, etc)



Learning about the ITOs

However, before engaging with ITOs through meetings or trade events/fairs, a DMC should do some homework and learn as much as possible about the ITO to match with their product offering and target markets. While some research needs to be done in advance in order to identify and set up meetings with ITOs that are a good match, asking questions when meeting with them is another option to get to know them better.

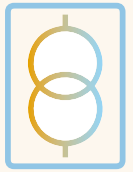
Good questions to get to know TOs and their target markets, during either meetings or trade events:

- What different nationalities / ages do they sell to? What are the preferences of different nationalities and ages for activities, food, accommodation, etc.?
- What are their clients' specific needs for service and safety standards?
- What are their needs for languages / guides?
- Are their clients interested in particular themes? E.g. agriculture, history, food?
- Are your activities / services a good match for their target groups?
- What could be improved / adjusted to make your products more attractive to Their target markets (e.g. shorter treks for seniors or families with children)?
- How can we make our programme more attractive for your international partners?
- What do they know about your product / service? Where do they see potential?
- Can they easily include your product / service into their current programmes?
- How could we make it easier to add your product / service to your programme?
- Don't forget to consider demand from domestic and regional tourists.

Meetings with ITOs

When DMCs or ITOs are consulted about new product ideas, they will be more interested to receive updates than if you cold call or send an unsolicited proposal.





- To build relationships and catalyse interest, schedule regular short meetings with ITOs e.g. every 3 months
- During these meetings:
 - » DMC's can **ask about gaps**, new trends and what customers are looking for (so that the DMCs can adapt and develop products accordingly) a 'brief'
 - » **Present what has been developed** based on the previous brief – trip concept with a few images, short description and **ask for input**
- If ITOs are part of the process of conceptualisation, development, etc, they have a personal interest in it.
- This improves the chances of sales/success.



Tourism Trade Fairs

The national DMO e.g. GTB will usually arrange a stand at tourism travel fairs – international or regional e.g. WTM, Akwaaba African Travel Market.

Step 1: Preparation

1. **Get information** from the tourism board (e.g. GTB) about which International Tour Operators (ITOs) are targeted or will be attending the trade show. Check online or in the catalogue.
2. Make a **shortlist** of ITOs which may be interested in CBT in the Gambia (they already sell Gambia/ neighbouring destinations, or they specialise in cultural tours).
3. Contact international tour operators 1 month in advance to make appointments. Do not arrive at a tourism fair and hope that tour operators will have time to meet and speak to you. Attending a tourism fair is a huge investment of time and money. By the time tour operators arrive they will already have a full schedule of meetings. You need to schedule your meetings in advance to benefit from participating in trade fairs.
4. **Prepare a short pitch / presentation** of new products and experiences. Lead with the visitor experience highlights, and also showcase any key sustainability highlights.

Step 2: Meetings

1. Listen to international tour operators carefully. Ask about their clients and needs.
2. Show how your new CBT products can be fitted into existing programmes and routes.
3. Make short reports of all meetings, insights, and agreements made by each party.



4. To get results from your participation, follow up your meetings and agreements.
5. Try to present offers which are adjusted to meet the needs of the tour operators.



Promote, educate, and motivate DMCs to be interested in the CBT Project

1. Partner with national tourism associations and government to organise product presentations and Q&A sessions for their members (many of which are DMCs)
2. Use e-mail and personal visits to update tour operators regularly, and build interest.
3. Invite tour operators to join site inspections and FAM (familiarisation) trips.
4. Provide tour operators with good quality product descriptions and photographs.
5. DMCs cannot create a programme based only CBT. They need information on hotels, restaurants, etc. Create a Sales Manual with full information on services in the destination.



What marketing messages are effective for selling CBT to western tour operators?

DMCs need persuasive marketing messages because they will be selling CBT to ITOs and they need compelling 'slogans/messages' to grab attention. DMCs sell CBT within their product offering.

To succeed in attracting tourists and tour operators, our marketing messages must be simple, fun, hopeful and inspiring. We need to offer easy choices, which make tourists feel that the hard work is being done for them (Font, 2015.)

Tourists and tour operators are looking for authentic experiences which benefit local people.

However, most tourists and tour operators value experience above sustainability.

Sustainability is a decision tipper between products of similar quality and price. Therefore, to successfully attract tourists and business partners, we must be able to show how CBT is a better experience for different target markets (e.g. senior, families, high-end, students, etc.).

Lessons learned marketing sustainable products can help us communicate CBT more attractively. Research has proven that tourists say they care about the environment and local communities. There is increased awareness. However, consumers increasingly feel confused, don't know what to do first, and fall back on price, habit and convenience (c.f. UNEP, 2006.)

To succeed in attracting tourists and tour operators, our marketing messages must be:

Simple

Fun

Hopeful

Inspiring

Offer easy choices: make tourists feel all the hard work is being done for them

The key message for presenting CBT activities is that clients will enjoy a **great local experience** with **real local benefits** for community members. Keep it simple. **Don't use technical terms to promote.**



Example: Myanmar Kayah State CBT Project

During the NTF III project, marketing messages which were successful in attracting DMCs and ITOs to include Kayah Community Based Tourism / Cultural tours in their offer included:

- A warmer welcome by local people
- A better experience than similar excursions
- More fun and hands-on
- More unique and inspiring (local people telling their own stories in their own voices)
- Fresher and tastier food
- Deeper, local insights
- Although life can be confusing, we're not so different (hosts and guests)
- We can make the world a little better

BE PREPARED

Does this step seem out of reach to you? Don't worry. In most cases, you won't be expected to offer capacity building to national tour operators to reach international markets! You can simply consider these tour operators / DMCs as important potential partners for promoting and selling a CBT program. However, this step shows us that **every stakeholder in the supply chain faces their own unique challenges.**

While promoting CBT to tour operators and requesting their support to train their tour guides, sales teams, etc, we also need to recognise that DMCs are operating in a highly competitive environment with many limitations. Good luck working with communities and tour operators towards a win-win.





Summary Action Points: 'C' connect

Agree on prices:

- You define clear, profitable, marketable, competitive prices, valid for at least one year.
- Use the 5Cs to calculate, compare, create value, consult and confirm win-win prices.
- Make sure to discuss and agree community fund contributions before agreeing on prices.
- Add value to your experiences through low cost presentation and a better experience.
- Consider package pricing, special offers, free of charge (FOC) for tour guides / drivers.

Engage and support local ground handlers:

- Invite local ground handlers to the field, to build awareness and understanding about CBT, and to nurture trusting relationships with local community members.
- Build LGHs capacity across key functions: product, sales and marketing, operations.
- Help LGHs to network with potential B2B business partners (e.g. national level DMCs).
- Organise a study tour for LGHs to meet DMCs and learn about their clients and needs.

Train licenced tour guides:

- Teamwork between community and licenced guides is a key success factor for CBT.
- Organise classroom and field training at a CBT destination for licenced tour guides.

- Licenced guides and community guides should practice working together as a team.
- Licenced guides must introduce the CBT team, and help them to translate to tourists.

Promote CBT to DMCs with a 'whole destination approach':

- Success at local level requires the wider destination to be 'on the tourist map'.
- Create a buzz using traditional and new media: newspapers, TV, radio, online, social.
- Create a sales manual to showcase the whole destination, and the new CBT products.
- Promote, educate and motivate DMCs to be interested in the CBT Project.
- Visit DMCs to make product presentations, and provide good quality information.
- Invite DMCs to visit the CBT destinations (FAM), test new experiences and meet suppliers.



Engage and support national level DMCs:

Depending on your role and access to funds, some recommendations are to:

- Build DMC's capacity to access international markets, seeking responsible, cultural tourism. e.g. Consider coaching at trade fairs, or support road shows in growing markets
- Support DMCs to improve their sustainability understanding and performance.
- National level: branding campaigns, national / local destination marketing campaigns.
- Create a buzz at tourism fairs: stage events, press conferences, promoting FAM trips.




Tips on communicating authentic, local experiences effectively:

- Great new CBT products will require creative, distinctive marketing to succeed.
- Do not promote 'CBT.' Promote inspiring, fun, unique, responsible, local experiences.
- Be exciting and reassuring: 'inspiring local experiences' but 'we're not so different.'
- Making a responsible choice is easy: 'together, we can make the world a little better.'





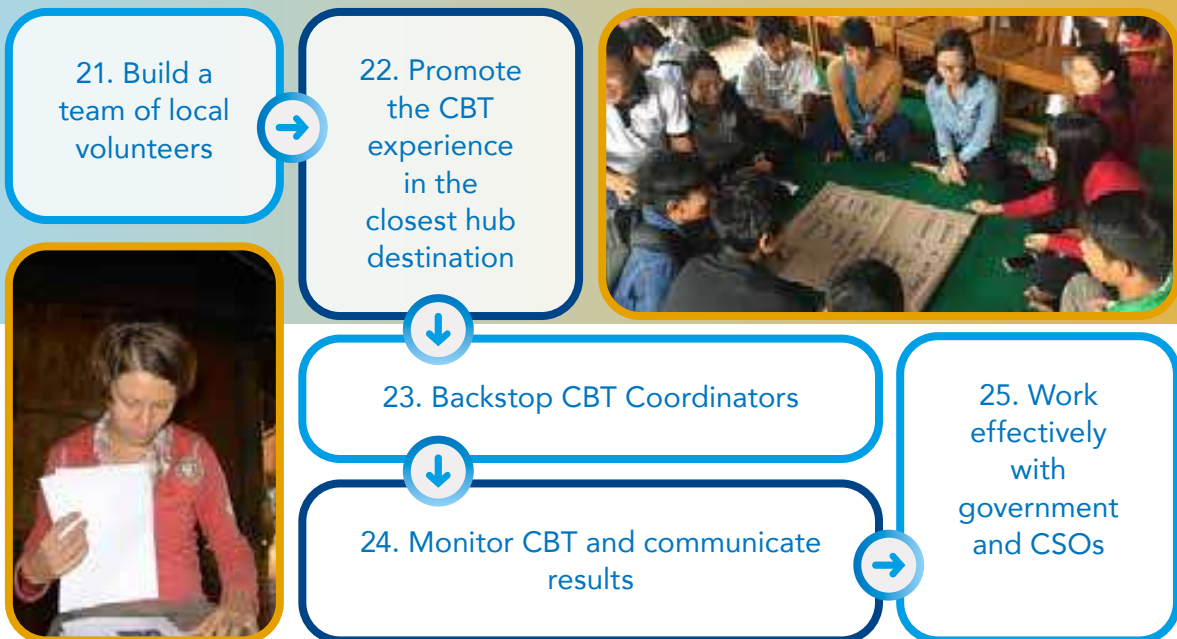


A photograph of three people in a forest setting. On the left, a man in a green cap and white shirt is partially visible. In the center, a man with a dark headband and a blue and white jacket looks towards the right. On the right, a woman wearing a light-colored headscarf and a plaid shirt looks towards the man in the center. The background is filled with trees and foliage, with a large white circle overlaid on the image.

Module 6. Conserve



Conserve consists of the following steps:



Conserve

“Carry on with something that one has begun. Remain in existence or operation.”

(Oxford Living Dictionary)

In the previous module, we dived down into pricing CBT, and how to work with and support business and marketing partners. At this point, you have helped to develop CBT programmes, and to link these programmes with tour operators and guides. Tourism marketing can be a slow process, often taking over a year between promoting and selling tours. In the meantime, it is good to focus on promoting the new CBT tours in the local area.

Moreover, you will need to put the people and systems into place to monitor the positive and negative impacts of CBT, in order to continually improve. In the case of NGO projects, your team may not stay in the destination following the end of a project. For this reason, it is essential to build a team of local volunteers, and nurture good relationships with government and local CSOs. These organisations can help to backstop communities and partners when projects end.

By the time you have completed this module, you will be able to:



Step 21: Build a team of Local Volunteers

WHAT'S THE ISSUE?

A key aim of CBT projects is to build the skills of local destination tourism professionals to develop community-based tourism. From the beginning of the project, work is usually done by a team of national and international colleagues, which allows for some knowledge transfer to local communities. However, an important point for a CBT project is to actively reach out to local volunteers who are interested to learn how to develop CBT.

WHY IS THIS STEP IMPORTANT?

As a trainer, we must always strive towards transferring our knowledge, so that local people are able to build on and reproduce our work after our project or contract ends. Without knowledge transfer, there is a high chance that CBT or other community development projects will not be sustainable.

CBT provides a platform for community members to build new skills, take on new jobs and develop new organization and management systems. This is a new experience for community members. Therefore, they need plenty of practice to gradually build their capacity. Short training courses are only a beginning. Villagers consolidate their knowledge and skills through direct experience, on-the-job, learning by doing. Coaching is an essential part of capacity building. Volunteers play a very important role supporting and 'backstopping' the CBT Club, as 'friends in the field'. Building a team of local volunteers is one of the best ways to initiate exchange of knowledge.

Stop and think:

- What kinds of tasks or activities could volunteers do?
- What people might be interested to be volunteers?
- How would you contact these people?

WHAT KINDS OF WORK CAN VOLUNTEERS DO TO HELP?

Volunteers can help with a wide range of jobs and tasks:

1 Help to conduct interviews and surveys. _____ ✓

Help to translate, or manage admin tasks. _____ ✓ 3

2 Help to confirm training and other events in communities and in town. _____ ✓

Helping to prepare presentations. _____ ✓ 4



IN THE FIELD

How to mobilise local volunteers

There are many ways to raise awareness and engage volunteers:

1. Engage with lecturers and teachers at universities and academies. Offer to conduct a guest lecture, and then offer volunteer or intern placements.

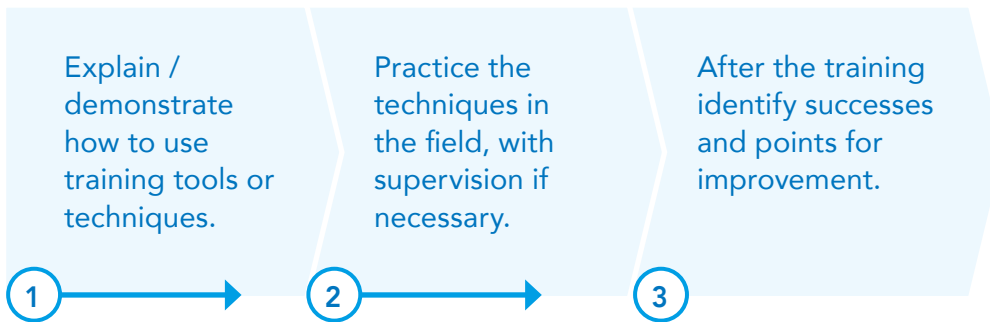
3. Initiate communication and give an open invite to licensed tour guides and tour operators to send their staff to join project field activities.

2. Invite government and NGO/CSO staff to observe and join field activities.

4. Invite literate youth in target CBT communities to be volunteers.



Use the following approach to invite a volunteer to take a training role:



TRAINING VOLUNTEERS

In most cases, volunteers will not have any of the skills that you need them to have such as conducting field surveys, supporting workshops and events, doing admin or other activities.

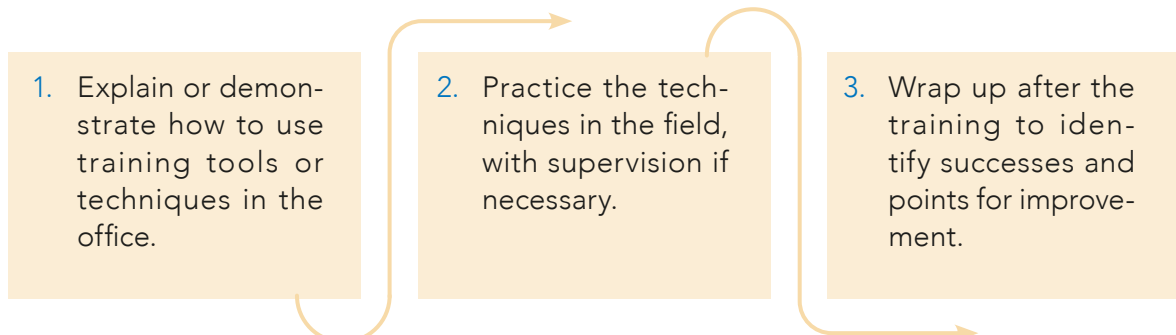
They will have to be trained on the tasks that they need to do.

CAPACITY BUILDING VOLUNTEERS AS CO-FACILITATORS

Volunteers may be developed from doing initial volunteer jobs to training assistants and co-facilitators. If volunteers are particularly enthusiastic and smart, you may wish to invite them to join your training events as a Co-Facilitator. You could lead the training, while your volunteer co-facilitator keeps notes, or writes responses onto flip chart for reference.



If you wish to invite a volunteer to take a training role, use the following approach:





Train volunteers in the tasks they will be doing such as:

- Conducting field surveys
- Engaging with local communities
- Doing administration
- Co-facilitation

Field examples from Myanmar

The project team engaged with volunteers in the following ways:

- An open invitation to Loikaw-based regional tour guides and the staff of local ground handlers to join all field trainings (not only tour guide / ground handler trainings). The ITC field team communicated continually with LTGs and LGHs about project activities. Volunteers frequently travelled to the villages using their own transport

- Through inviting the junior staff of the state MOHT office to join all field trainings. After 6 months, the team had established trust with the Loikaw MOHT team. Junior staff were keen to have field experiences. The ITC team made a formal request to the MOHT for junior staff to be able to join, observe and participate in field work

- Through volunteer lectures at Loikaw university, which enabled us to meet young people who did not have regular work, and were eager to gain work experience

- Through volunteering time to support Regional Tour Guide training being implemented by the MoHT from Nay Pyi Taw and Loikaw state office

- After the first six months of the project:
 - » Volunteers were so active and enthusiastic that when ITC was requested to work in a further two villages in Kayah state, our team offered a simple Training of Trainers (ToT) programme for volunteers to practice many of the key steps to developing CBT
- During the second year of the project:
 - » The ToT participants assisted the ITC project team in many useful ways. E.g.: visiting target villages to collect information; visiting target villages to prepare the community members for upcoming study tours; helping to translate project documents and training presentations into Myanmar language
- The ToT used a three-step model:
 - » First, the team introduced the participants to different field tools / processes
 - » Next, participants went to the field to practice
 - » Finally, the ITC team organised a debriefing session to identify successes and points for improvement and discuss these with the volunteers
- By the end of the process, participants included representatives of:
 - » Different **sectors**: government, private sector, CSO and CBO
 - » Different **ethnic groups**, including groups which had historic conflicts
 - » Different **ages and levels of experience**, from 18 to over 60 years old
 - » Different levels of **education**
- Reaching out to local volunteers was one of the key success factors of the project



BE PREPARED

Many volunteers may not be able to join every training session, especially in the high season. Plan training events and activities around the availability of the volunteers to ensure that they can participate and thereby support the development of the CBT.



Step 22: Promote in the closest hub destination

WHAT'S THE ISSUE?

International tourism supply chains are a powerful marketing channel. However, they are also slow. It can take as long as 2 or 3 years before companies agree to include a CBT programme in their offer, then actually produce their annual brochures, market, sell and operate a tour. Therefore, partnering with local tourism businesses to promote CBT to independent travellers inside the destination is also essential. Local tourism businesses (owners / managers) should also have opportunities to experience CBT and understand how they can support CBT.



WHAT IS A LOCAL TOURISM BUSINESS?

The following are local tourism businesses:



PROMOTING CBT THROUGH LOCAL TOURISM BUSINESSES



There are different ways to promote CBT through local tourism businesses. These include:

- **Making CBT programmes** and prices available in hotels.
- **List of Licensed Tour guides** who have been trained (directory with name and contact number)
- **Organising CBT tours** (Fam trip) / site inspections for local tourism stakeholders.
- **Delivering briefings to tour operators**, tour guides and hotel associations and
- **Asking them to promote** the tours in their premises

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Examples from Myanmar

Some of the techniques used to market CBT tours to independent travellers included:

- Producing impactful posters and pamphlets to promote the tours.
- Organising CBT tours / site inspections for local tourism stakeholders.
- Training the junior staff of the MOHT how to present the new CBT tours.



- Delivering briefings to tour operator, tour guide and hotel associations and requesting all members to be allowed to promote the tours in their premises.
- Continual communication and trainings for regional tour guides based in Loikaw.
- Offsite training for tour guides based in Inle Lake.

IN THE FIELD

How to organize a FAM trip for local businesses (hotels, restaurants, etc)

Step 1: Prepare the CBT communities and team

- Design the fam trip programme and invite local businesses.
- Coordinate with community members and resource people in advance.
- Explain who is coming, and their roles in tourism in the destination.



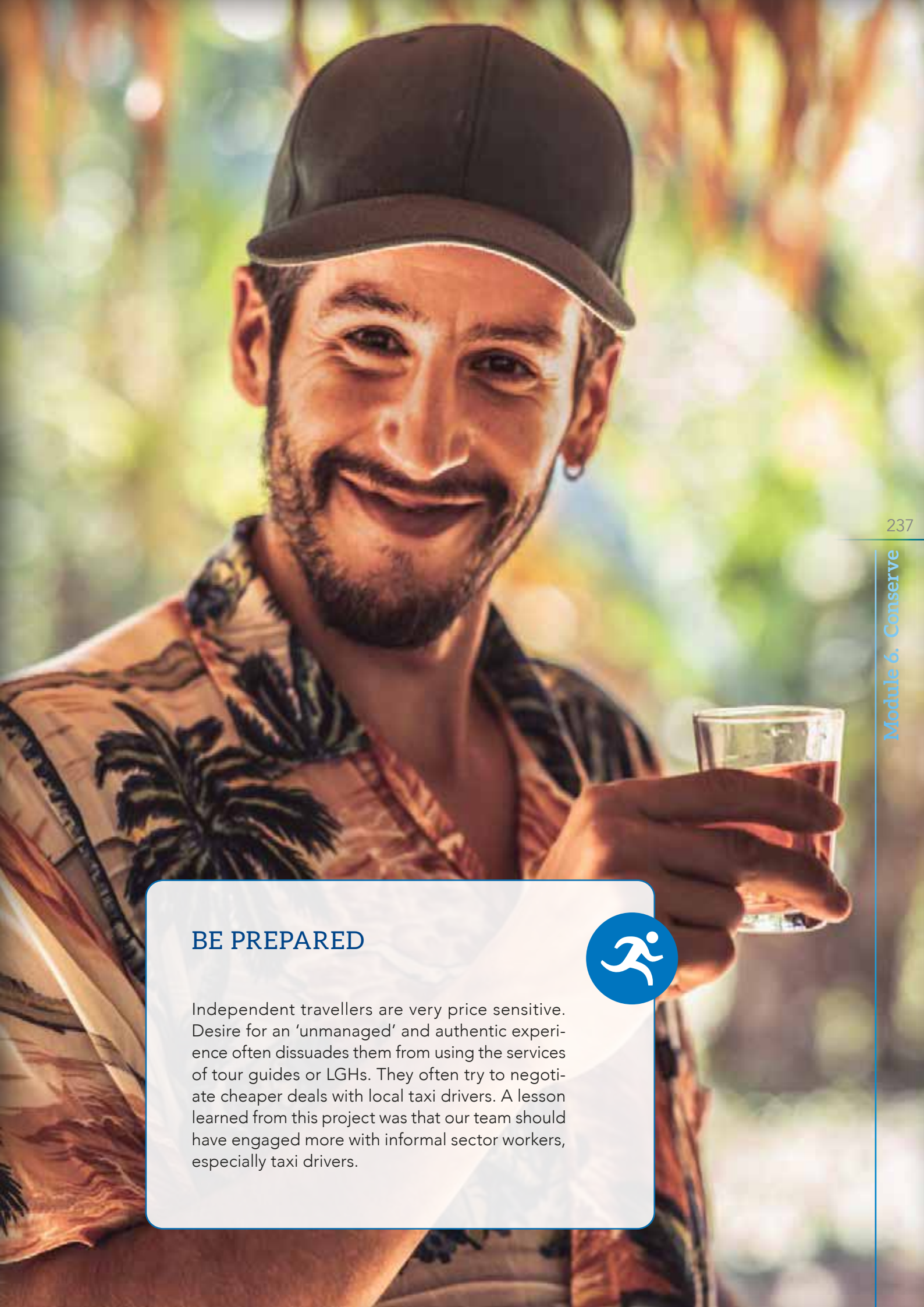
Step 2: Give a quick briefing to local businesses before setting off for the communities

- Overview of FAM trip programme.
- Understanding market demand for local experiences.
- What is CBT and how was it developed (keep it simple).
- How can local businesses benefit from new products to sell?
- FIT tourists and CBT: Challenges and Solutions.



Step 3: Provide promotion material, CBT programme, price, contact no's, trained licensed guide directory





BE PREPARED



Independent travellers are very price sensitive. Desire for an 'unmanaged' and authentic experience often dissuades them from using the services of tour guides or LGHs. They often try to negotiate cheaper deals with local taxi drivers. A lesson learned from this project was that our team should have engaged more with informal sector workers, especially taxi drivers.

Step 23: Backstop CBT Coordinators

WHAT'S THE ISSUE?

By this point in the process, the village coordinators have been trained to:



- Take bookings
- Provide receipts
- Record accounts
- Inform CBT members when there is a tour and follow up
- Meet regularly with the CBT members to discuss successes and challenges

Despite this training and coaching, it is not easy for CBT Coordinators to work un-assisted on bookings / accounting, etc. Community members may have very little formal education. Simple, unintended mistakes can easily be made, such as accounting errors. Mistakes may draw suspicion of financial mismanagement to coordinators when there has actually been no intention to act dishonestly. It is useful if a local organisation is on hand to backstop CBT Coordinators for the first 18 months following training.

IN THE FIELD



Backstopping

Backstopping is the provision of ongoing support and guidance to CBT workers as they get to know their roles and responsibilities. Backstoppers will check what they are doing and help spot any errors or mistakes, and will guide on taking corrective action and will coach and ensure that members can do the tasks consistently correctly.

- The backstopping organisation and responsible staff need to have significant trust and authority within the community, and with outside stakeholders.
- Local government or an established and trusted NGO or educational partner (like a local university) are ideal hosts.





Step-by-step support to local, CBT coordinators:

Provide ongoing backstopping to the CBT coordinators with the following actions:

1. Visit each of the CBT villages every month, sit with the coordinator, update the situation, review accounts and collect important data.
2. Listen, update progress, give advice and solve challenges.
3. Help CBT coordinators to organise a monthly CBT Club meeting and produce monthly reports.
4. Support annual reporting or monitoring meetings with stakeholders.

Example: Backstopping in Kayah State

In Loikaw, the ITC team worked together with the local MOHT office to build the skills of junior MOHT staff to backstop the CBT community coordinators. This was part of a bigger initiative to develop a 'CBT Check-In Center' at Loikaw MOHT, with five key responsibilities including:

- Giving information about Kayah tourism / CBT
- Supporting CBT Coordinators post-project
- Collecting key data to show project progress and achievements
- Creating attractive media to promote the CBT destinations
- Using data to plan CBT development (still a work in progress)

Training was provided to the junior MOHT staff to travel to the villages and help the CBT Coordinators to summarise their accounts, prepare for monthly meetings and solve problems.



BE PREPARED



It is important to allocate responsibility and travel budgets for this model to be sustainable.



Step 24: Collect data, monitor, and communicate results

WHAT'S THE ISSUE?

Tourism can be a positive force for communities, by developing new skills and confidence, creating new opportunities for work and income, and helping to fund social and environmental work in the community.

However, positive socio-economic benefits may not necessarily outweigh negative impacts on natural resources, wildlife, society and culture. It is important to monitor tourism to be able to recognise and take action against negative impacts.

CBT Facilitators should be able to Work with community members to identify priority issues to monitor and improve and establish a simple monitoring system to achieve this.



Collecting data can help the community and supporting organizations by:

- Identifying and following up many different types of positive and negative impacts of tourism on the local economy, community, culture and environment.
- Reporting transparently, preventing misunderstandings and conflicts in the village.
- Proving the results and impacts of the project to outside stakeholders.
- Creating a foundation for evidence-based planning based on supply and demand. E.g.: training new CBT staff and investing in new equipment at the right times.
- Adding value to promotion by showing how local people benefit from CBT.

Despite the value of this data, to implement a sustainable monitoring system is challenging. Local people working on CBT often work in agriculture; collecting data is (unsurprisingly) not a priority for rural farmers. Most people working on CBT initiatives prioritise agricultural work, which can consume time from dawn until dusk during busy periods such as ploughing, planting and harvesting seasons.

Even when local people have the capacity and systems to collect data, they have little time or motivation to collect complex information. For this reason, a simple, very carefully prioritized monitoring system based on local realities is essential.

According to the Dutch development organization, SNV, *“the scoping of key issues is the most crucial step in the development of a monitoring programme. Scoping is the process of identifying a number of priority issues – ideally less than 20. Key Issues are the most important areas of concern facing the community in terms of its’ social, cultural, environmental and economic wellbeing.”* (SNV, TIM, 2008).

Data is necessary for:

- Transparency and preventing conflicts and misunderstandings in the village
- Proving the results and impacts of the project to outside stakeholders
- Using as a foundation for evidence based planning and balancing supply / demand
- Adding value to promotion by showing how local people benefit from CBT

However, although communities may collect data, actually using the data requires support. As a CBT facilitator, your job is to lead the CBT group to discuss and identify key issues to monitor; and to choose and practice how to use simple monitoring tools. The process below assumes that a backstopping organisation (discussed in Step 23), which is prepared to support the CBT group for 12 – 18 months, has been identified.



IN THE FIELD

One Day Planning Workshop

The best way to help community members to identify key issues to monitor is by facilitating a one-day planning workshop.

This will take the community members through a step-by-step process to identify:







- How will we **know** if there has been a + or - change? (indicators)
- What kind of information will we need to collect to be sure?
- How will we collect the information?
- How often and when will we collect the information?
- Who will collect the information?
- Who will assess the information?



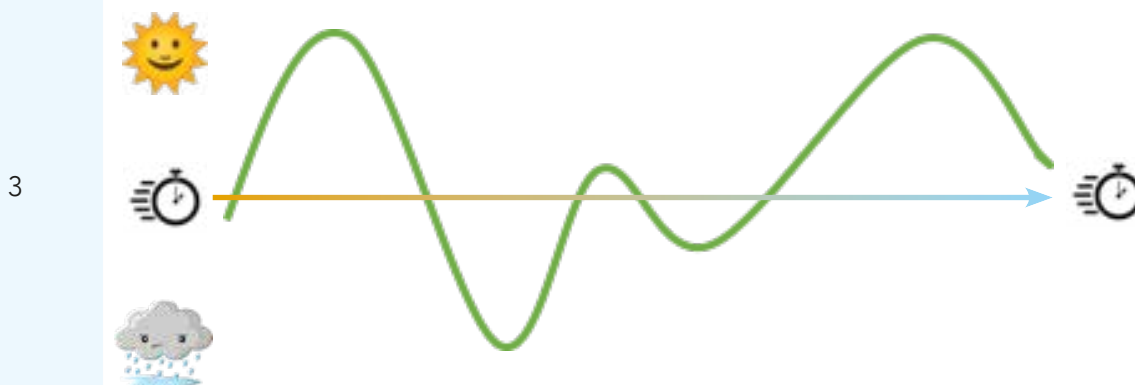
An outline for a one-day training to achieve these objectives could be:

Time	Activity
09.00	1. Opening formalities, objectives and overview of training programme
09.30	2. The value and role of a backstopping organisation
10.00	3. Review past steps , and consider CBT moving into the future » What are our hopes for tourism in the future? » What are our concerns for tourism in the future?
11.00	Break
11.30	4. Monitoring CBT : what, why, how, who?
12.30	Lunch
13.30	5. Group work to propose and prioritize key issues to monitor and draft indicators to measure changes over time
14.30	Break
15.00	6. Presentations by groups
16.00	7. Feedback and adapt tools based on trainer's suggestions
17.00	Wrap up

Workshop content and delivery:

Step	Content				
1	<ul style="list-style-type: none"> Opening Formalities: welcome, registration, other Objective and overview: <p>Present these in slide format or on a flipchart sheet</p>				
2	<p>The value and role of a backstopping organisation</p> <ul style="list-style-type: none"> Explain the role of a backstopping organization (see Step 23) Explain how the CBT Coordinator and CBT group will need to work as a team with backstopping organisations, and what they will need to prepare for meetings with backstopping organisations (e.g. up to date accounts) Discuss with CBT group members to understand their perspectives about different options for backstopping organizations (e.g. GO/NGO/CSO) 				
3	<p>Review past steps of CBT development</p> <ul style="list-style-type: none"> This can be a simple discussion to review different steps of CBT development up to this point in time Alternatively, the trainer can prepare laminated photos or a presentation showing these different steps. Ask CBT group members to share what they remember from each step Review the CBT group's vision and objectives for CBT Inform the group that you will now think about the future <p>CBT moving into the future</p> <p>Taking into account the group's objectives for CBT, small groups will confer over:</p> <ul style="list-style-type: none"> What are our hopes for tourism in the future? What are our concerns for tourism in the future? <p>Specific hopes and concerns should be grouped under suitable headings. For example, economic, social, cultural, and environmental headings; along with safety and service to ensure that feedback from tourists is also central to monitoring.</p> <p>Use simple images to indicate positive and negative for the direction CBT elements are heading:</p> <table border="1" style="width: 100%; text-align: center;"> <thead> <tr> <th>Hopes for Tourism</th> <th>Concerns for Tourism</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table>	Hopes for Tourism	Concerns for Tourism		
Hopes for Tourism	Concerns for Tourism				
					

Indicate hopes and concerns over time:



Monitoring CBT: what, why, how, who?

What: Explain to the community that you will help them develop a simple system to monitor 5 – 20 key issues, based on their prioritized hopes and concerns. If the CBT trainer is aware of a critical issue which has been overlooked (for example the need to protect a rare species), he / she should propose this for consideration.

Why? Explain that the CBT group that the value of monitoring is to be able to observe and measure positive and negative changes connected to each issue.

By measuring changes over time, we will be able to see how we are making progress, and how we need to adjust, to manage CBT in the best possible way.

Who? The community and partners can help provide feedback and information:

- 4
- Communities
 - GOV
 - CSO/NGO
 - Private Sector
 - Tourists

Who participates will depend on the specific issue which we wish to monitor.

How: The heart of the process is to Measure, Monitor and Manage

The CBT group members, working with the CBT trainer, should consult and agree on 2-3 most important key issues by group (e.g. a total of 2-3 environmental issues, 2-3 social issues). The total number of issues should be between 10 and 20 key issues.

What issues are most important to monitor? To clarify, the trainer can ask “What do we most hope to achieve and what impacts are we most concerned to avoid?”

Group work:

Next, community members will work in groups. One group could consider all the hopes and challenges related to the environment, another group consider all the hopes and challenges related to customer service and experience, etc.

One by one, consider each prioritized, key issue:

- How will we know if there has been a + or - change? (indicators)
- What kind of information will we need to collect to be sure?
- How will we collect the information?
- How often and when will we collect the information?
- Who will collect the information?
- Who will assess the information?

Finally, key issues should be the *"most important areas of concern facing the community in terms of its' social, cultural, environmental and economic well-being"*.

Going into the concept of 'indicators' in more detail

The trainer may choose to go into the subject of 'indicators' in more detail. You will need to assess case by case whether extra information will be helpful or confusing.

5

Indicators are designed to measure CHANGE

- Quantitative change: E.g. 20 to 30 local guides/ 20% to 30% more income
- Qualitative change: E.g. resident's perception of tourism (Like Scale 1-5)
- Normative change: From "yes" to "no" or from "have" to "don't have"
- Change from baseline: E.g.: Changes in the amount of monthly income which community members earn now, compared to before CBT

You can use a combination of indicators to measure change in specific issues:

- Baseline: Number of women working in the CBT Club >
- Monitoring indicator: % increase in No. of women working in the CBT Club

How do you know if it is a good indicator?

- Is the indicator appropriate to the issue – is it meaningful?
- Is the indicator easy to understand?
- Is it feasible to collect this information (\$\$/People/Time)

How (easily / \$\$'s) can the indicator be measured and recorded??

How can the information about the issue realistically be collected?

E.g. through:

- Feedback forms for tourists
- Cash books / accounts books / bookings books (number / %)
- Surveys / questionnaires / interviews / focus groups
- Transect Walks with Counting (the number of bottles, plastic bags, etc.)
- ...

Remember that communities are dynamic:

- If it's terrible now, it can get better
- If it's great now, it can get worse!
- So, we are not monitoring until we arrive at 'a satisfactory situation' – we are monitoring to ensure that we remain in 'a satisfactory situation'
- We are monitoring to be aware of changes
- We are monitoring to know what changes need to be made

Examples of CBT creating benefits / limiting impacts on economy and society:

How will we know that CBT is having a positive impact?	How do we show that CBT is having a positive impact	How and who will collect the data?
<ul style="list-style-type: none"> ■ Increased income for active service providers. 	<ul style="list-style-type: none"> ■ % increase in monthly income of service providers. 	<ul style="list-style-type: none"> ■ Personal interviews
<ul style="list-style-type: none"> ■ Women, youth and seniors have opportunities to work. 	<ul style="list-style-type: none"> ■ Number of women, youth and seniors working for CBT group. 	<ul style="list-style-type: none"> ■ CBT Club records
<ul style="list-style-type: none"> ■ The community fund is effectively used for community development. 	<ul style="list-style-type: none"> ■ Satisfaction of community leaders with CF. ■ Number of local projects supported by CF 	<ul style="list-style-type: none"> ■ Community Fund administrators



Examples of CBT creating benefits / limiting impacts on local culture:

How will we know that CBT is having a positive impact?	How do we show that CBT is having a positive impact	How and who will collect the data?
<ul style="list-style-type: none"> CBT activities are based on appropriate aspects of local culture, which people feel proud and comfortable to share with visitors. 	<ul style="list-style-type: none"> % of community members who feel satisfied with the CBT programme. Number of cultural activities in the CBT programme. 	<ul style="list-style-type: none"> Survey Focus group
<ul style="list-style-type: none"> Community guides inform visitors about local life, culture and important do's and don'ts. 		
<ul style="list-style-type: none"> Youth are actively involved in CBT, and cultural knowledge is being passed between generations. 		

Examples of CBT creating benefits /limiting impacts on the environment:

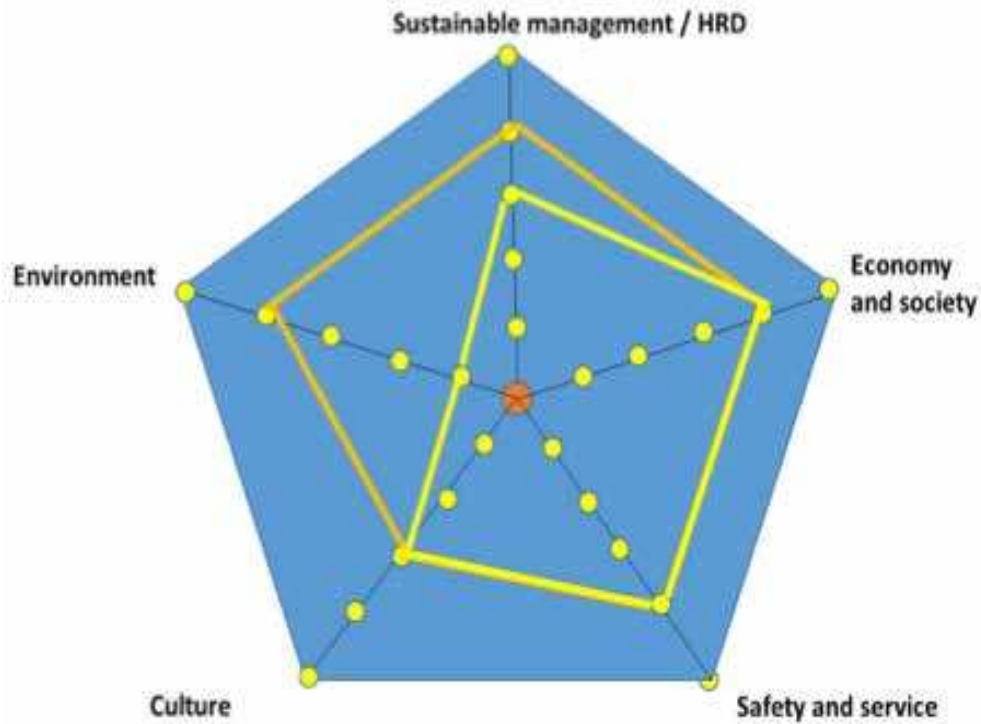
How will we know that CBT is having a positive impact?	How do we show that CBT is having a positive impact	How and who will collect the data?
<ul style="list-style-type: none"> Tourism impacts on the environment are limited and managed. 	<ul style="list-style-type: none"> Number of items of plastic waste used and disposed by CBT group per month. 	<ul style="list-style-type: none"> CBT Cooking class to record quantity of plastic waste.
<ul style="list-style-type: none"> Visitors are well-informed about sensitive natural areas, flora and fauna, and how to protect the natural environment. 	<ul style="list-style-type: none"> Number of tour programmes including a nature conservation activity. % of tours which include environmental do's and don'ts. 	
<ul style="list-style-type: none"> Waste, including organic, is managed, reduced, reused and recycled 		

How to visualize achievement and change?

One way to visualise how positive the current situation is, and to visualize change over time is mapping using scales of one to five across all the main groups of issues.

- 1 would be an unsatisfactory situation. For example, a lot of waste and rubbish on the beach or in the village, or very low feedback from tourists.
- 5 would be a very satisfactory situation. For example, a spotlessly clean beach or very high feedback from tourists.

Tool 18: Tool to Visualise Achievement and Change



How to make the data useful?

Finally, all this information is only useful if it is used.

There are many, very practical ways that monitoring data can be used. For example:

- To summarise 'headline figures' (e.g. the total income to villagers) and develop powerful media. E.g. show tourists how their trip makes a positive financial impact on local families by illustrating that the income which CBT group members earned during year XXXX is equal to 'X' kilos of rice, 'X' meals, 'X' months of education, etc.
- Identifying and the most popular and profitable services
- Identifying the most popular channels to market
- Identifying which tour operators and tour guides are using the CBT services and which are not
- Identifying if flora or fauna are being disrupted by tourism

IN THE FIELD

Training in the classroom and field was provided to junior MOHT staff on:

- The booking and accounting systems used in the CBT villages
- Meeting the CBT Coordinators and practicing helping to collect data
- The general value and uses of the data being collected
- Practicing summarising key information, including:
 - » Total income
 - » Total income per service
 - » Total number of tourists (International / Domestic)
 - » Total number of tourists per channel (LGH/LTG)
 - » Type of tourist:
 - a. General tourist Couple
 - b. Family
 - c. Senior
 - d. Student / academic
 - e. Government study tour NGO study tour
 - f. Team building
 - g. Special interest group Volunteer

- Practicing how to use the data to extract useful information. E.g.:
 - » The value of the total income in real terms. For example, illustrating that the income is equal to 'X' kilos of rice, 'X' meals, 'X' months of education, etc.
 - » Identifying and The most popular and profitable services
 - » Identifying the most popular channels to market
 - » Identifying which LGH and LTG are using the CBT services and which are not
- Practicing how to use 'headline figures' (e.g. total income to villagers and what that represents in real terms) to create powerful media to promote the benefits of CBT
- Practicing how to make short promotional videos for Kayah cultural tours, which include the highlights of the tour, plus key figures on benefits to local people



BE PREPARED



Our experiences in the field confirmed that it is possible to rely on local community members to collect data on income and visitor numbers, but not to collect more sophisticated types of data. So far, it has been too difficult for the CBT coordinators to observe the 'types of tourists'. Collecting data needs to be practiced, monitored, and improved, one step at a time.



Step 25: Work effectively with Government and CSOs

WHAT'S THE ISSUE?

Government support is necessary to keep sectors and stakeholders moving at all levels. The private sector will offer more support to a project with government support. State and local level officials will only cooperate if they are sure of national level support. Specific tools were used at national and state levels to ensure strong cooperation with government. In the field, it is also very important to cooperate with local NGOs and CSOs.



IN THE FIELD



It is important to build cooperation at different levels in order for the CBT to get support from national, regional and local level. There are different ideas for doing this.

National level cooperation

A **lead ministry** must be identified to define and coordinate roles, responsibilities, and expectations. This ministry helps identify key stakeholders to be project partners.

The Project Steering Committee (PSC) should meet every 6 months and include participation by senior public and private sector stakeholders. A PSC is a tool to maintain communication and support from the start to the end of the project. This channel allows updating progress, providing feedback, and making formal requests across sectors.

Focal point staff must be appointed by the lead Ministry of Commerce to work with the project team. The selection of staff should be well managed to ensure that senior, focal point and supporting staff are active, genuinely interested in the project and hard working. The choice of government counterparts is a very significant success factor.

Government staff should, wherever possible, join field activities from the beginning of the project. The PSC should join field trips every year. This results in them seeing progress after only six months.

Local level cooperation

- Depending on the level of autonomy, it can be useful if the regional / state level is given a mandate by National level government to support the CBT initiative.
- Inviting junior government staff to train alongside junior private sector staff can help to build friendly relationships, and generate positive outcomes in the future.
- Link with government information services, such as information centres
- Strategies to build good working relationships with local government include:
 - » Regular briefings on project progress
 - » Informal meetings to update and share ideas.
 - » Training for junior level staff, which directly benefits the local government.
 - » Consider conducting some training on-site at ministry offices. This helps to build a sense of momentum and to build confidence in the usefulness of the project.
 - » Assist local or state level to make requests to national level if possible.
- Inviting junior government staff to train alongside junior private sector staff helps to build friendly relationships, which are likely to generate positive outcomes in the future.



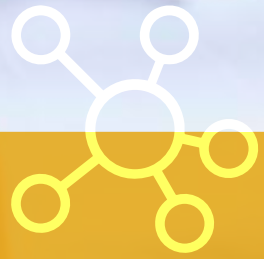
- The CBT Check In initiative was designed to ensure sustainability at the end of the project. Junior government staff were trained to give information about the CBT programmes, backstop the CBT coordinators, and help to collect data on visitor arrivals and income.

Cooperation with NGOs and CSOs



- » Organise courtesy visits to local NGOs working in tourism, or issues related to tourism such as environment, culture, waste management, etc.
- » Introduce the plan for the CBT initiative.
- » Invite NGOs / CSOs to join project activities.
- » If there is budget available, consider offering to pay to use NGO/CSO facilities for trainings and events.
- » NGOs and CSOs often work with extremely small budgets, and even small gestures can make a big difference.

BE PREPARED



It is important to maintain good, open communication with government staff at national and state levels. If government staff feel that they cannot follow the progress of the project, then they can lose interest in the project. Even after developing good personal relationships with government staff, it is still important to respond to formal requests in good time. For example, sending formal letters of invitation for government staff to join meetings or events. It is also important to maintain trusting relations with NGO and CSO staff, who often have considerable influence over public perception and goodwill towards CBT.

Summary Action Points: 'C' conserve

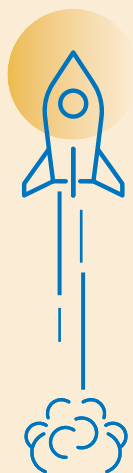
BUILD A TEAM OF LOCAL VOLUNTEERS:



- Identify young people who are interested in tourism, searching for opportunities.
- Reach out to local tourism businesses. Explain how CBT can benefit their businesses.
- Invite volunteers / students / junior staff to accompany / volunteer for field activities.
- Consider Training of Trainers as a strategy to keep skills in the destination post-project.

PROMOTE IN THE CLOSEST HUB DESTINATION:

- Selling through tourism supply chains is slow. Also promote CBT locally to FITs.
- Develop posters and pamphlets showing the CBT tours, and how they can be booked.
- Present CBT to local associations and request help to display the posters / pamphlets.
- Train gov. staff to present CBT product highlights / booking channels to FIT travellers.



BACKSTOP CBT COORDINATORS:

- For the first 12 – 18 months, local CBT coordinators will lack experience, and need support to continue the CBT management systems such as bookings, accounts, etc.
 - You need to identify a team to
 - » backstop CBT coordinators
 - » collect key data to show project progress / achievements
 - » use data for planning and promotion
- It is necessary to allocate clear responsibilities and travel budgets to be sustainable.

COLLECT AND USE DATA:

- Data on visitor numbers / income, etc. is necessary for transparency, preventing conflict, proving results, planning how to balance supply / demand and promotion.
- Develop simple criteria to monitor CBT based on community members' hopes and concerns for tourism. Support to consider criteria across the pillars of sustainability.
- Train local government or NGO staff to collect data from the communities. Use the data to forecast and prepare for increased tourist arrivals. E.g. by training additional community staff, food providers, local homes and resource people for artisan visits.
- Also use data to plan the right time to develop new CBT communities. Only develop CBT in additional communities if there is sufficient demand to support their products.



WORK EFFECTIVELY WITH GOVERNMENT AND CSOS



- Identify a lead ministry and 'focal point' staff. Establish a Project Steering Committee.
- Keep government counterparts updated, using correct / timely protocol as necessary.
- Invite national / state government to join field activities, to observe project process.
- Make courtesy calls to brief NGOs on the project and seek synergies to support their work.
- Create direct opportunities for GO and NGO staff through trainings / coaching, etc.





