TRAINING WORKBOOK
Tourism is one of the driving forces of global economic growth, currently providing 1 in 11 jobs worldwide and represents nearly 10% of the global GDP. It is also one of the industries that poses both an opportunity and a threat to traditional livelihoods and ecosystems, and therefore the need to turn customary tourism practices into sustainable ones is essential. And, what better way of doing this than by engaging the communities where the activities take place?

The global commitment to achieve the Sustainable Development Goals (SDGs) calls for joint actions towards sustainable tourism, particularly because it has the potential to contribute to all of the goals, either directly or indirectly. Tourism features as a target for Goal 8 – good jobs and economic growth, Goal 12 – responsible consumption, and Goal 14 – the conservation and sustainable use of oceans and marine resources. By enabling the development of skills for improving the quality of products and services offered by communities, local inhabitants have the opportunity to provide decent work opportunities for community members, enable practices of sustainable consumption and production, protect their natural resources and improve local livelihoods.

SWITCH Africa Green, as a framework of programs aiming at bringing innovation and improvement of current practices towards the development of an inclusive, green economy in the African continent, sets the context for partnerships towards the achievement of the SDGs. SUS-TOUR, as a program of SWITCH Africa Green, is an initial step to support Kenya’s ambition of being a globally competitive and prosperous nation with a high quality of life by 2030. Tourism, being one of the six pillars to achieve this goal, offers an excellent opportunity for multi-sectoral partnerships to be created and strengthened, and SUS-TOUR is an example of these partnerships. The Collaborating Center on Sustainable Consumption and Production (CSCP), as a Think and Do tank committed to the creation of solutions for a sustainable planet, is proud to be part of this exciting journey along its local partners Ecotourism Kenya and the Federation of Community Tourism Organizations, and counts with the support of experts from the KUONI Group and the UN World Tourism Organization.

This workbook is an instance of how the green economy encompasses more than solely addressing solutions towards environmental preservation. It is an invitation to explore the field of visions of sustainable lifestyles, to gain knowledge on the interrelationships between socio-environmental issues and how they can represent opportunities for economic development and a sustainable future. The interactive approach of the training gives participants the opportunity to exchange experiences and personal perspectives on the topic of sustainable tourism, sustainable business development and capacity building, and to provide training to others in understanding these topics in relation to their personal contexts. SUS-TOUR and the training depicted in this manual aim at encouraging the innovative spirit of communities and enabling them to seize the opportunities that a sustainable, green economy conveys.

I invite the users of this manual to use each of its components and become active agents of change in their communities.

Michael Kuhndt, Director
Collaborating Center on Sustainable Consumption and Production
Foreword by SUS-TOUR Project Partners

The basic premise of the concept of sustainable tourism is that a tourist makes a positive impact on the environment, economy, and society of the visited destination. This is pertinent, as conventional tourism often has some adverse impacts on the resident communities. Moreover, the economic benefits from conventional tourism rarely benefit the resident rural communities where most of the tourism enterprises are based. A tourism model that incorporates the interest of the locals is therefore necessary in the development of sustainable tourism.

Community-based tourism (CBT) offers a form of ecotourism where local communities have significant control over the development and management of tourism enterprises, and where a large proportion of benefits resulting from tourism activities remain within the community. The resident communities will be more concerned with the long-term impacts of tourism development as compared to ‘non-resident’ investors, whose decisions will mainly be influenced by the bottom line. Therefore, the residents would promote tourism practices that enhance economic, environmental and social sustainability.

A number of CBT ventures exist in Kenya today. They range from undertaking handcraft activities such as beadwork to owning and running a conservation area. The emergence and growth of the CBT concept has been boosted by conservation organizations and proponents of ecotourism in the country. However, the development of the CBT concept in the country is still incomplete. For instance, there is limited and inconsistent data on CBT enterprises in government and private organizations that deal with CBT. Additionally, most Community Based Tourism Enterprises (CBTEs) in Kenya lack principle business practices to make their enterprises profitable in the long run. Therefore, it is pertinent for CBTEs to increase their capacities in sustainable business practices through training.

CBT can be a solution to many of the problems that are caused by mass-tourism in the country. Although the community is at the center of CBT, government, and non-governmental organizations are important for CBT development in the country. Specifically, support from tour operators, government marketing agencies, academia and the regional administration is important. It is for this reason that SUS-TOUR has adapted a multi-sectorial approach in promoting the CBT concept in Kenya that incorporates Community Based Tour Operators (CBTOs), tour operators, county government officials, national government officials, tourism organizations, and tertiary academic institutions in the project.

Through SUS-TOUR, mini, small and medium enterprises (MSMEs) will find ways to improve their business performance and, by enhancing the multi-sectoral approach to CBT development, the project partners can endorse green practices towards more profitable CBT ventures.

It is important to highlight that this workbook presents a ‘hands-on’ approach to training. It is a tool that complements existing knowledge on CBT and enables the newly formed SUS-TOUR trainers to enhance the promotion of CBT beyond the project duration.

Grace Nderitu, Chief Executive Officer
Ecotourism Kenya
The Federation of Community Based Tourism Organizations (FECTO) was created with the purpose of facilitating CBT enterprises in maximizing their potential to produce and market quality tourism cultural products and services. We are aware that major tourism experiences occur at sights bordering local communities that have some sentimental attachments to the attraction sights in terms of cultural beliefs. The communities have assumed ownership of these sights as part and parcel of both cultural and environmental conservation. To continue playing this custodian role, their participation in the tourism business as part of livelihood creation is paramount. This support is only assured through CBT development, which puts the host communities at the center of tourism management.

For people to run CBT professionally and competently, they must be empowered by business management skills through training. There are hundreds of Community-Based Tourism Operators (CBTOs) in various tourism destinations and attraction sites spread across Kenya. Most of them are run as a hobby or pass-time and this needs to be changed for the better. The success of CBT depends on the involvement of various stakeholders, which is important for marketing, policy formulation, infrastructural development and improvements. This is why various government agencies involved in tourism at both national and regional levels are important, as well as the not-for-profit organizations that support cultural and environment conservations.

SUS-TOUR is a project with high ambitions, as it intends to fulfill the expectations of CBTOs and Tour Operators regarding market linkages and enhancement of business management skills while meeting the expectations of governmental agencies, who expect fresh thinking in attracting more tourism business to Kenya. CBT has the potential to become a supplement of the mainstream tourism management and that is also why other partners involved in SUS-TOUR expect recognition of their initiatives in tourism and cultural conservations.

We expect that this training material, which has been designed as a tool to share case studies, understand success factors and promote entrepreneurial skills, will support communities in the development of high-quality products and services.

Francis Kodhiambbo, Chief Executive Officer
Federation of Community Based Tourism Organizations
Community Based Tourism in Kenya

This project is funded by the European Union

About SUS-TOUR –
A SWITCH Africa Green Project

Kenya aims at being one of the top long-haul tourist destinations in the world, offering a high-end, diverse, and distinctive visitor experience. To this end, Community-Based Tourism (CBT) offers an opportunity by creating new high-value niche products that enable tourists to discover local habitats and wildlife, while celebrating traditional cultures, rituals and wisdom. Enhanced understanding of the market and its business principles are needed for CBT to improve and uncap the potential for improving livelihoods of rural communities in Kenya, and it is for this reason that, under the framework of SWITCH-Africa Green projects, SUS-TOUR was created.

The SUS-TOUR program aims at bringing together communities, tour operators, policy makers and university lecturers in order to identify and develop strong CBT businesses that can support Kenya's green growth. The program is designed to contribute to the sustainable development of tourism in Kenya through promoting customer-oriented innovation and marketing of CBT, fostering improvement in rural livelihoods, and enabling the conservation of culture and nature.

SUS-TOUR activities include:
- Identifying opportunities for sustainable tourism – by developing tools to understand and translate the demands of tourists into CBT innovation and marketing strategies;
- Knowledge transfer – by identifying and sharing international, regional and local best practices for innovation, marketing and partnership development for CBT;
- Capacity building – by supporting different CBT stakeholders in honing their skills for enhancing the business principles of CBT and integrating them into mainstream products; and,
- Guiding CBT forward – by providing recommendations for the improvement of enabling CBT policy frameworks and marketing structures.

About SWITCH Africa Green

SWITCH Africa Green is an EU-funded project aiming at supporting African countries in their transition to an Inclusive Green Economy and promoting a shift to more Sustainable Consumption and Production (SCP) patterns and practices, while generating growth, creating decent jobs and reducing poverty. Building on the experience of similar regional programs (SWITCH Asia and SWITCH Med – Mediterranean) and following up the UN Conference Rio +20, SWITCH Africa Green will support partnerships between governments and the private sector in Burkina Faso, Ghana, Kenya, Mauritius, South Africa and Uganda. The program will support a number of projects and initiatives developed under the national development plans and national indicative programs as it is intended to serve as a pilot for possible subsequent projects, achieving a broader coverage in the sub-Saharan African region. Partners in the overall set of activities include UN agencies, notably UNDP and UNOPS, the African Union Commission, the African Roundtable on SCP (ARSCP) and the African Development Bank (AfDB). The partnership entails building on existing cooperation towards poverty alleviation, environmental protection, SCP, green economy and green growth (UNEP, 2012).
# Table of Contents

**Foreword** ......................................................... 3
**Table of Contents and Terms of Use** ................................ 7
**Core Concepts** .................................................... 10
**Introduction** ...................................................... 13
**Welcome to the trainers** .......................................... 13
  - Target group ................................................... 15
  - Role of trainers and training material ................................ 16
  - Training agenda .................................................. 16
  - Understanding the Workbook ...................................... 18
  - Hands-on. Starting the training .................................... 19
  - Some basic definitions ............................................. 25

**Module 1 – Kenya Context** ........................................ 28
  - Basic definitions .................................................. 31
  - Kenya Today .......................................................... 33
  - CBT opportunities .................................................. 36
  - SWOT analysis ...................................................... 39

**Module 2 – Success Factors** ........................................ 43
  - Basic definitions .................................................. 46
  - CBT success factors ................................................ 49

**Module 3 – Idea Generation** ......................................... 56
  - Basic definitions .................................................. 59
  - Stakeholder mapping .............................................. 63
  - From expectations to products .................................... 65
  - Idea consolidation .................................................. 76

**Module 4 – CBT Business Plan** ..................................... 79
  - Basic definitions .................................................. 85
  - Introduction to the Sustainable Business Model Canvas ........... 87
  - Preparation for CIW ................................................ 90

**Module 5 – Facilitation skills** ....................................... 97
  - Relevant information about facilitation ............................ 100
  - Organizing a SUS-Tour session .................................. 106
  - SUS-Tour session flow ............................................ 108
  - Skills to hone for trainers: leadership and communication ........ 117

**References** .......................................................... 121
**Annexes** ........................................................... 125
  a) Module 1 – SWOT considerations, SWOT analysis template ........ 125
  b) Module 2 – Case studies and success factors analysis template .... 129
  c) Module 3 – Persona ID cards, Persona analysis card, stakeholder mapping template ........................................... 133
  d) Module 4 – Sustainable Business Model Canvas ...................... 145
  e) Module 5 – Self-assessment template ................................ 147
This Workbook is intended for SUS-TOUR trainings and is accompanied by handouts to be used during the sessions.

This workbook will be given to the participants of SUS-TOUR trainings AFTER completion of the training. Please note that no online version will be available for download.

Terms of Use
This material is an intellectual property of SUS-TOUR project. All copyright, trademarks and other intellectual property rights are protected and remain by its owner. This material is intended for trainings organized as part of the SUS-TOUR project and all sessions should be notified to the project team at the beginning of the training planning. Content should be properly referenced. Users may not modify, copy, distribute, transmit, display, redistribute, reproduce, publish, license, commercially exploit, create derivative works from, transfer, or sell any SUS-TOUR activity or training section without first obtaining permission from the project partners. The infringement of any of these regulations may convey penalties for international violation of property rights.

SUS-TOUR is funded by The European Union (EU) and supported by:
ACRONYMS

CBO – Community Based Operations

CBT – Community Based Tourism

CBTE – Community Based Tourism Enterprise

CBTO – Community Based Tour Operator

CIW – Collaborative Innovation Workshop

CSCP – Collaborating Center on Sustainable Consumption and Production

EK – Ecotourism Kenya

ESD – Education for Sustainable Development

PECTO – Federation of Community Based Tourism Organizations

GE – Green Economy

SCP – Sustainable Consumption and Production

SD – Sustainable Development

SDG – Sustainable Development Goals

SL – Sustainable Lifestyle

TO – Tour Operator

UNDP – United Nations Development Programme

UNEP – United Nations Environment Programme

UNOPS – United Nations Office for Project Services
“Green Growth” is a concept that possesses at least 13 definitions (Sustainable Development Knowledge Platform, 2016). For the purpose of this training, the definition we use is the one provided by the UN Economic and Social Commission for Asia and the Pacific (UNESCAP), which defines it as “growth that emphasizes environmentally sustainable economic progress to foster low-carbon, socially inclusive development” (UNESCAP, 2012).

The concepts introduced in this section represent the backbone of all the activities leading to “Green Growth” either in economic, social or environmental terms. Unless clearly referenced in the text, most of the definitions hereby depicted are built on the outcomes of the research accrued by the Collaborating Center on Sustainable Consumption and Production and have been used in various publications of the center. For direct references, please visit the “references” section of this workbook.

Sustainability: Redefining the Links?
The globally accepted definition of sustainable development (SD) was proposed by the Brundtland Commission and states that SD is “development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (WCED, 1987). For this to happen, sustainability implies the redefinition of the links between nature and mankind in order to create sustainable societies. A sustainable society is one where individuals have access to goods and services that satisfy all their needs without jeopardizing the well-being of nature and of other individuals. For this to become a reality, social structures must reorganize themselves in a way that economic activities no longer depend on the ever increasing exploitation of natural resources and where the notions of re-use, recycling and substitution of technologies and energy sources become the main drivers of production and consumption. The planet is increasingly showing signs of the urgency of lifestyle changes, thus providing the means to seize entrepreneurial opportunities to solve these problems without sacrificing our quality of life and to help bridge existing prosperity gaps between nations.

Sustainable Livelihoods
The 1991 definition suggested by Chambers and Conway explains that “a livelihood comprises the capabilities, assets (including both material and social resources) and activities required for a means of living. A livelihood is sustainable when it can cope with and recover from stress and shocks and maintain or enhance its capabilities and assets both now and in the future, while not undermining the natural resource base.”

Sustainable Lifestyles (SL)
A lifestyle is defined as “the way people live at a particular time and place” and it describes the attitudes, values and beliefs as the ways individuals relate with each other and with nature. This interaction can be translated into terms of consumption and production, where nature produces the conditions for inhabiting the planet whilst all living creatures consume these goods, mankind in particular. UNEP defines sustainable lifestyles as “the way we live our lives, what we do, with whom, where, how and what we use to do it. They also define our identity; we express our social position, political preferences and psychological aspirations to others [...]. Creating sustainable lifestyles means rethinking the ways we organize our daily lives. It is about transforming our societies and living in balance with our natural environment. All our choices and actions contribute to sustainable lifestyles” (UNEP, 2005).

Sustainable Livelihoods and Sustainable Lifestyles in the Context of Sustainable Living
There is an intrinsic relationship between lifestyles and livelihoods; the first one refers to the choices that individuals make based on their values and beliefs, while the second one is often defined as the capabilities to access “well-being”. UNEP suggests that: “Sustainable livelihoods [...] are not limited to, for example, a particular level of income, paid labor or ability to meet household food security, but must include opportunities for investment and business, national economic stability and reliable and accountable governance systems” (UNEP-Africa Environment Outlook, 2006). Sustainable living is thus the interaction between the lifestyle choices and conditions determining individuals’ livelihoods.
Education for Sustainable Development (ESD)

ESD goes beyond environmental education and has gradually integrated aspects of the social and economic dimensions of sustainability. It is presently defined as empowering learners “to take informed decisions and responsible actions for environmental integrity, economic viability and a just society, for present and future generations, while respecting cultural diversity. It is about lifelong learning, and is an integral part of quality education. ESD is holistic and transformational education which addresses learning content and outcomes, pedagogy and the learning environment. It achieves its purpose by transforming society” (GAP Roadmap, UNESCO, 2014, p. 11).

Transition to Sustainable Development

The above definition of sustainability comprises the necessary actions to transition from unsustainable to sustainable lifestyles, thus leading the journey towards a sustainable society. Since human activities are intrinsically connected with the local and global natural environment, the necessary conditions for SD to become a reality are:

- A holistic consideration of the impact that each activity has in terms of raw material consumption, waste accumulation, creation of compounds that harm nature and human health, and the ways individuals satisfy their needs.
- Human activities that care and respect the environment with a decoupling of the use of natural resources from economic growth.
- An equitable distribution of the world’s resources such that human needs are equally satisfied and ecosystems respected.

Sustainable Consumption and Production (SCP)

It is a notion that provides an overview of our lifestyle drivers, and hence, it also represents an opportunity to address the challenge of sustainability in a way that supports both business and the shift in lifestyles. The SCP approach implies the use of a wide range of public policies, technologies, investments, the involvement of the private sector and coordinated consumer action that influences supply and demand for sustainable goods and services. SCP requires integrated methodologies for improving production and consumption practices in all stages of product or service lifecycles. SCP occurs within the institutional framework of policies and education systems and springs forth from the willingness of individuals and communities to promote sustainable change.

The main focus areas are: Biodiversity, Resource Efficiency, Economy and Business, Social Welfare and Climate Change.

The holistic SCP approach makes it possible to identify a vast array of potential businesses opportunities for a number of reasons, including:

- The global market for sustainable products and services is growing steadily.
- Environmental and socio-economic factors are changing the competitive landscape for businesses.
- Product and service sustainability is beginning to represent a new point of leverage for leading brands that seek to retain and build competitive advantage.
- Many businesses are beginning to understand sustainable products and services as a framework for driving growth, increasing shareholder value and customer satisfaction, as well as holding potential for a wider outreach with the community and commercial partners.
- A growing number of developing countries recognize the potential of SCP to strengthen national strategies for sustainable development. Governments are paying ever greater attention to stimulating SCP through tools including economic stimulus programs and subsidies, programs for start-up sustainability-oriented companies, tax benefits, the promotion of new markets, etc.
- SCP also provides the opportunity to leapfrog to modern environmentally sound technologies, allowing developing countries to adopt more efficient and competitive technologies.

To sum up, SCP requires an integrated approach to improve quality of life from both production and consumption stages of product and service lifecycles.
CORE CONCEPTS

Sustainable Development Goals (SDGs)
They are a set of universally applicable goals that balance the three dimensions of sustainable development—environmental, social, and economic—looking at the critical areas of people, planet, prosperity, peace and partnerships (UN, 2015). Building on the Millennium Development Goals, they represent the greatest global challenges and their fulfilment is indispensable for sustainable development. Their implementation depends on collaborative partnerships around the 17 goals and their targets (UN, 2015).

SDGs and Sustainable Tourism
The UN World Tourism Organization (UNWTO) defines sustainable tourism as “tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities” (UNWTO, 2016). Because of its nature, sustainable tourism is related to all the SDGs and is among the targets of goals 8, 12 and 14. However, it is inherent to all the goals, thus representing an opportunity to develop practices that bring together stakeholders towards consensus building, leadership development and constant participation.

Consumption and Production: Some Balance?
Our consumption patterns influence the ecosystem. The sharp increases in consumption and production of goods have caused many negative effects on the environment that are increasingly posing challenges not only for nature but also for humanity. It is not hard to understand which human activities are responsible for many impacts with deep and wide reach.

Resource consumption is increasing along with the ever-increasing growth in population. Therefore, the basic means of supporting sustainable livelihoods are in peril. The numbers and facts of the following sections demonstrate this in terms of resources, energy, water, population and nutrition.
WELCOME TO THE TRAINERS

This workbook has been designed to support you in the organization and delivery of SUS-TOUR trainings to different audiences. The objective of the workshop is to bring individuals of diverse backgrounds to work together towards the identification of opportunities for sustainable tourism in Kenya. Moreover, the trainings facilitate knowledge transfer and enable capacity building among the participants, ultimately guiding Community Based Tourism (CBT) forward through the development and implementation of sustainable, locally-designed products and services.

Please note that this training is as an introduction to business development for Community Based Tourism. The information pertaining to business management and marketing strategies belongs to SUS-TOUR go-to market material and is not part of the current edition of this workbook.

The training session is structured in a flow that enables the trainer to guide the participants through an experiential learning process, designed to:

- gain or deepen the understanding of the opportunities and challenges that CBT in Kenya faces today;
- perform critical analyses of experiences that can help identify solutions with potential to be introduced, adapted or developed on the local level;
- develop and hone the participants’ entrepreneurial skills;
- enable participants to create action plans to be locally implemented; and,
- prepare the participants as SUS-TOUR trainers, thus becoming multiplier agents.

Considering that people undergo a 4-stage cycle of learning (Fig. 1), it is important to identify the channels to be used for every stage in a way that participants of the training experience and understand the concepts presented and tools used.

The first stage, immediate or concrete experiences, is enabled by introductory notions of concepts through activities they can draw experiences from. The second stage of the learning cycle is known as observations and reflections. This is why after every activity, participants are invited to share their thoughts about what they learned and discuss with other participants.

The third stage could be seen as the most challenging one, as it is important to let the participants turn these reflections into personalized messages (abstract conceptualization) that they can connect with. Here is where referring to the flow of the training, the Sustainable Business Framework (explained below) offers an opportunity to create individual connections to the topics and realizing how it is related to her/him. The learning cycle closes when the participant enters the “actively tested” stage to create new experiences. This means understanding the concept of Sustainable Community Based Tourism and having the willingness to implement it in their daily practice -that is, your trainee shares her/his experience with peers, inviting them to create their own experience.

This is also why a SUS-TOUR trainer is recognized as such only AFTER having undergone the ENTIRE TRAINING PROCESS. This means, attending ALL the sessions without exceptions.

The training flow has been designed according to the Sustainable Business Framework developed for this project.
INTRODUCTION

Identifying and understanding

- Megatrends influencing tourism
- Global demands from tourists
- Local needs and demands (strengths, opportunities, weaknesses and threats)

Communicating and implementing

- Training for education, capacity building and skills development
- Output and short term outcomes review
- Consolidation of partnerships
- Development of marketing strategy

Inclusive and sustainable CBT business / product/services

- Managing profit
- Stakeholder satisfaction review
- Best practice development
- Networking and international exposure

Analyzing and aligning

- Existing practices of products and services
- Success factors’ review
- Inventory of resources and activity development
- Creation of partnerships

Co-creating and testing

Awareness raising

Local governance and accountability

Stakeholder satisfaction

Figure 2. Sustainable Business Framework for CBTs
The workbook is divided into 5 core modules. Each module has specific, interconnected objectives, congruent with the overall structure of the program. The trainer has to have a clear understanding of the objectives of each module in order to explain the exercises and guide the group through a reflective learning process.

Every module contains an explicit list of materials, handouts, instructions and referenced material that helps to build a rich content and allows the trainer to plan and deliver an impactful session. The overall objective of this modular approach is to have a workshop that thrives on the mix of technical information, the exchange of ideas among participants and the integration of individual strengths and knowledge.

**Module 1**
Introduction and Kenya context: The definition of Community Based Tourism and the vision of Kenya 2030 as a common ground for discussion and joint collaboration are presented. Moreover, the activities are designed to gain an objective understanding of the country’s current reality and opportunities for the tourism sector.

**Module 2**
Success factors analysis: Through the active analysis of existing CBT practices, participants will have the opportunity to understand what makes a CBT product/service successful. Moreover, they can relate these factors to their local contexts in order to identify which ones are feasible and applicable to their own communities.

**Module 3**
Idea generation: By gaining a deeper understanding of the different stakeholders participating in CBT in Kenya, participants have the opportunity to brainstorm on products and services they would like to turn into business opportunities.

**Module 4**
Community Based Tourism Business Plan development: With the introduction of the most used tools for business development, this module takes participants one step further in the creation of a successful CBT product or service. Here, the ideas generated will be analyzed from different perspectives, leading to the creation of an initial model to be implemented.

**Module 5**
Training skills: This module is designed to support future trainers in the organization and delivery of a SUS-TOUR training session by honing their facilitation skills and providing useful tips to implement the activities presented in this workbook.

The target group and training materials

This manual is for use by people who had experience with the SUS-TOUR training, and are now organizing the workshops on their own. The trainers’ background and expertise vary, ranging from academicians with well-developed teaching skills, to representatives of communities with a deep understanding of their communities’ challenges and tour operators with sound knowledge of the hospitality industry.

Given this diversity, the material aims to provide a common ground for collaborative work, enabling participants to bring forward their individual knowledge and expertise and learn from the experience of other stakeholders involved in the workshop.

The materials have been designed in a way that they are easy to reproduce. Explanations are kept as short as possible, stating illustrative references for further reading. Handouts are also included to facilitate individual work.

The sessions have been planned to engage between 20 to 30 participants. Should the groups be larger, it is suggested to have two facilitators and split into smaller working groups. The ideal number of participants per group is between 5 to 6 people. Larger groups may make it difficult for everyone to speak up and participate.
INTRODUCTION

The role of the trainers

The trainers are responsible for facilitating the sessions of the workshop, as well as for:
• Explaining the process and activities that accompany each session in order to make sure the dynamic evolves as planned and results are achieved;
• Providing orientation; and
• Adding the results of individual modules into a coherent big picture of the overall training.

The work of the trainer forms the basis for the prominent awareness of CBT’s relevance and the opportunities to develop new services and products within this field.

The implementation of the various activities is very dynamic and a good documentation of the results is important. It is recommended to work with the help of visual means to retain the ideas and keep reminders of important information. There are flipcharts, graphics, photos, handouts and other material that can be integrated into the work process.

The Training Agenda

This training is presented in two modalities, both containing the same information, but with the difference being the time needed for delivering the entire training

Modality A – An introduction to CBT development. 1.5 day agenda. It consists of a short introduction of the topics and a quick, yet detailed experience of the activities, allowing participants to gain an initial understanding of concepts and preparing them to become trainers. This modality is recommended for lecturers and people who are familiar with training other people.

Modality B – Intensive training. 2–3 day agenda. This training allows for deeper and longer discussions in order to consolidate outcomes that can be taken to a next level of development. This modality is recommended for participants that are already planning to develop a project or are already working on existing projects and would like them to be more sustainable and adequate for CBT growth. The length of the training will vary as it is suggested to include the participation of practitioners to share their experiences and learning.

When delivering the training on Modality B, Module 5 activities could be focused on pitching.
Overview of the training flow
The detailed moderation plan is available in Module 5 and Annex E.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>120</td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>150</td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
</tr>
</tbody>
</table>
Understanding this workbook

Every module consists of a series of activities, background information and relevant facts and figures that can support the dialogue during the development of the activities as well as invite the participants to learn more about the topics addressed.

At the beginning of every section of the agenda, you will find a quick overview of the agenda showing the topic, the session, its length and objectives.

Relevant information, such as key concepts that relate to the overall content of the project and the training itself, are provided at the beginning of every section. These information blocks will not necessarily be presented in detail during the training, therefore, this manual offers succinct, yet descriptive, definitions and concepts that can be further discussed and are easy to identify by the icon:

All the data comes from renowned sources and the reference list is available at the end of this workbook.

Within the session, you will find a description of what is going to happen in terms of activities, these are clearly identified by the icon:

The activities are described using the following structure:
• Name of the activity
• Objectives
• Time allocation
• Materials
• Room requirements
• People requirements
• Process description
• Reporting methodology

Along the text describing the section, you will also find several facilitation tips. They will be marked with the icon and they will help you to better prepare to become a SUS-TOUR trainer. Module 5 contains more information about how and when to apply these tips.
Please note that the length of the introduction section is the same for both modalities of the training.

**WHERE ARE WE NOW?**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td><img src="image" alt="Image" /></td>
<td>40</td>
<td>Welcome the participants, get to know each other and their personal expectations</td>
</tr>
<tr>
<td><strong>Module 1. Kenya Context</strong></td>
<td>Kenya Today CBT opportunities SWOT</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td><strong>Module 2. CBT Success Factors</strong></td>
<td>Identification Assimilation</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td><strong>Module 3. Idea generation</strong></td>
<td>Stakeholder mapping From expectations to products Consolidation of ideas</td>
<td>150</td>
<td></td>
</tr>
<tr>
<td><strong>Module 4. CBT Business Plan</strong></td>
<td>Introduction of the Business Canvas Drafting the plan Preparation for CIW</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td><strong>Module 5. Training skills</strong></td>
<td>Self-assessment Training flow Skills building Dry runs</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
HANDS-ON. STARTING THE TRAINING

Your training session begins by welcoming the participants. You may know some of them already and they may also know each other as well, but normally, you’ll be dealing with groups of people that do not know each other and it is therefore important to know what kind of “ice” needs to be broken.

Some useful information

Icebreakers

If you’re bringing together people of different backgrounds, even if they’re from your own community, it is important to create a common space to have a neutral and friendly working ground. If your audience is comprised of like-minded people or people that already know each other for quite some time, your “ice” may be just to get everyone in the mood to work.

All differences must be handled sensitively, keeping in mind what is important for this training. Therefore, you should focus on the similarities that your participants bring about rather than on the differences. And the one thing they all have in common at this moment: they are here to be part of the SUS-TOUR training.

For choosing your icebreaker, you need to know:

1. **The objective of your icebreaker.** Many icebreakers are introduced with the purpose of building a team or exploring different topics besides being an initiation for a time working together. In the context of SUS-TOUR training, the objective is to introduce the participants to each other in order to learn each other’s names, have an idea of which organizations they are representing and uncover the one expectation that brought them to the training. Participants need to have badges. If your group is relatively small, it is encouraged to ask them for their individual expectations and make a list. This way, you can use the list during the reflection at the end of the training to check if the expectations were met.

2. **The size of your group.** The bigger the group, the more time you will need for the icebreaker part of the session. Bear in mind the objective of your icebreaker. For SUS-TOUR training, if you are dealing with a group of over 20 people, it may be convenient to have a short round of introduction. If you have a group of over 20 people, you should think about an activity that is simple and perhaps can be done in smaller groups rather than in one large setup.

3. **How much time you have for the activity.** You should design your icebreaker considering the first two points: purpose and size of your group. The larger the group, the more time you will need to go through the activity in order to give everyone the opportunity to have their say. The SUS-TOUR training is designed for one and a half days and the purpose is to provide participants with a hands-on experience of the Sustainable Business Framework for CBT.

4. **The “openness” of your group.** Ask yourself, are they the kind of people that would participate in an activity tossing a ball or drawing on scrap paper? You have to design an activity suitable for your audience and to the purpose.

This activity is optional in case of having a group of less than 20 people. Otherwise, just a round of introductions with people standing up and mentioning their name and organization will suffice.
ACTIVITY – ICEBREAKER: TOSSING THE BALL
(TOTAL TIME: 40 minutes)

Objectives
• Facilitate a quick round of introductions (name and organization)
• Collect expectations on the training

Time allocation
• 2 minutes to explain the activity
• 30-35 minutes to toss the ball and do introductions
• 3 minutes for recap and introduction of the next session

Materials
• Flipchart
• Marker
• Small, soft ball

Room requirements
Enough space for the group to be in a circle

People requirements
• 1 person to take notes on the expectations
• 1 facilitator checking nobody is left out

Process Description
• Facilitator welcomes the group and asks everyone to stand in a circle
• The facilitator introduces her/himself and explains that the person receiving the ball is kindly asked to introduce her/himself by saying their name, the organization they represent and one expectation they have for the training
• After the person is done with her/his introduction, s/he tosses the ball to another participant.
• This activity will be repeated until everyone in the room has been introduced
• Supporting facilitator writes down the expectations on a flipchart

Reporting Methodology
• No reporting needed – the flipchart with expectations will be used to close the session and link to the next one
• It is important to keep the flipchart for revisiting it at the end of the training
## WHERE ARE WE NOW?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>10</td>
<td>Introduce the program, its overarching objectives, the partners and funders as well as the agenda of the day</td>
</tr>
<tr>
<td></td>
<td>Training overview Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities SWOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification Assimilation</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping From expectations to products Consolidation of ideas</td>
<td>150</td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas Drafting the plan Preparation for CIW</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment Training flow Skills building Dry runs</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
It is important that before starting the activities, the participants know what will happen during the day. During the icebreaker, they shared their expectations about the training. This next short, informative activity is simply an introduction to SWITCH Africa Green, SUS-TOUR perks and the agenda of the day.

Due to the time available, this session is meant to be delivered using a presentation. You will be provided with the presentation on its official template to be adapted by you depending on the dates and location. Below, you can have an overview of the presentation.

*Figure 3*
**WHERE ARE WE NOW?**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td>Icebreaker</td>
<td>5</td>
<td>Link the objectives of SWITCH Africa Green and SUS-TOUR with the national plan for growth</td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>150</td>
<td></td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Canvas</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
Now that your participants know what the training is about and have an idea of who else is in the room, it is important to have some basic, common understanding of the topics behind the content of the training and SUS-TOUR itself. In every section, you will find some key definitions to help you consolidate this baseline knowledge.

Please note that this is a very short session delivered via a presentation, followed by a brief discussion. You will be provided with the files of the presentation as part of this training package. More detailed information about the definitions presented in this workshop can be found in the Best Practices Manual for Community Based Tourism Enterprises (CBTE) document available for download on the project’s website.

Some Basic Definitions

Definition Community Based Tourism

Generally, community based tourism involves communities controlling, managing and developing their own tourism industry, whereby tourists and travellers can experience the community's way of life and consider their social, economic, and environmental impacts upon the destination they are visiting. CBT has been used to describe a broad range of different tourism models but usually refers to tourism that involves community participation and aims to generate benefits for local communities in the developing world by allowing tourists to visit these communities and learn about their culture and the local environment. Community participation in the tourism initiative is central to all definitions, ranging from cooperatives or individually-owned and managed businesses, to joint ventures between the community and the private sector. The two most significant criteria used in the academic definition are community ownership/management and community benefit.

“Community based tourism development would seek to strengthen institutions designed to enhance local participation and promote the economic, social and cultural well-being of the popular majority. It would also seek to strike a balanced and harmonious approach to development that would stress considerations such as the compatibility of various forms of development with other components of the local economy; the quality of development, both culturally and environmentally; and the divergent needs, interests and potentials of the community and its inhabitants.”


“Community Based Tourism (CBT) is tourism activity, community-owned and operated, and managed or coordinated at the community level that contributes to the well-being of communities through supporting sustainable livelihoods and protecting valued socio-cultural traditions and natural and cultural heritage resources.”

2 The ASEAN community based tourism standard (2016)

Community based tourism is usually defined by three characteristics: indigenous leadership, sustainability, and cultural immersion.

Indigenous Leadership

Community based tourism is managed by indigenous communities. This means that communities assumes collective responsibility for all aspects of your stay, including accommodation, internal travel, local food, and cultural activities.

Communities reap the benefits from tourism revenue, making community based tourism a sustainable alternative for many travel organizations, which often do not work in solidarity with the communities and environments they use.

Through community based travel, collective well-being is valued over corporate or individual profit.
**Sustainability**

Communities will only accommodate as many people as they are able to, keeping in mind long-term sustainability, and avoiding unnecessary strain on their own resources. Meals generally draw on local agriculture, and communities will not take on more guests than their housing and energy resources can effectively support.

Aside from physical resources, revenue from community-based travel helps to sustain indigenous cultures and traditions in a rapidly changing world.

**Cultural Immersion**

Travellers are able to experience the diversity and customs of another culture, and to interact with the community. Unique lodging, cuisine, and activities form a foundation for increased knowledge and awareness of another culture, different set of beliefs, and social norms.

**The Kenya Vision 2030 (presentation)**

The Kenya Vision 2030 is the national long-term development policy that aims to transform Kenya into a newly industrializing, middle-income country providing a high quality of life to all its citizens by 2030, in a clean and secure environment.

- The Economic Pillar aims to achieve an average economic growth rate of 10 per cent per annum and sustaining the same until 2030.
- The focus on tourism is on diversification, increasing the number of international visitors and positioning Kenya as among the top long-haul destinations in the world by offering high-end, diverse, and distinctive visitor experiences.
- CBT has become part of the agenda through appreciation for ecotourism.

The Vision 2030 provides a common direction for the development of the country and it helps to define the direction for developing businesses and social initiatives alike. Understanding the vision is the first step to take action, as it helps to identify the areas where a project can contribute the most as well as who the potential allies could be.

**The National Tourism Strategy**

The strategy was commissioned by the Department of Tourism in 2012 and is a product of a deliberate stakeholders’ consultative process to address tourism challenges. Challenges to be addressed include:

- **Challenge 1:** Reinforce the Kenya tourism industry as a high-quality service sector
- **Challenge 2:** Better position Kenya as the number 1 tourism destination in the world
- **Challenge 3:** Make the tourism industry part of the knowledge economy
- **Challenge 4:** Develop Kenyan tourism in a sustainable manner
- **Challenge 5:** Increase the value generated from available resources
- **Challenge 6:** Create an environment conducive to tourism businesses
- **Challenge 7:** Invest in tourism infrastructure
- **Challenge 8:** Ensure an efficient transportation system

The strategy identified 5 Thematic Areas for which guidance and a systematic approach are needed:

1. The need to have an effective product development and deployment approach
2. The need to enhance the marketing of Kenyan tourism products
3. The need to address inadequate financing and improve the investment environment
4. The need to be more scientific through research and information management
5. The need to focus on human capital, as well as legal, policy and institutional frameworks
A vision for a competitive Kenya

**Overarching Vision**
A globally competitive and prosperous nation with a high quality of life by 2030

**Economic**
To maintain a sustained economic growth of 10% p.a. for most of the next 20 years.

**Social**
A just and cohesive society enjoying equitable social development in a clean and secure environment.

**Political**
An issue-based, people-centered, result-oriented and accountable democratic political system.

**Enablers and Macro-Foundations**
Cross cutting infrastructural development, STI, Public Sector Reforms and Macroeconomic stability

**National Value System**

---

You can ask your group this simple question: Why is Community Based Tourism an opportunity for achieving the Kenya Vision 2030?
Welcome to the journey for enabling the Green Economy in Kenya! By now, you are already familiar with the vision (and ambition) for 2030 and are getting ready to explore further the ways you can develop and/or strengthen high-quality, sustainable CBT products and services to support the sustainable development of Kenya.

The objective of this module is to assist you in building new linkages between CBT practices and your local context while honing your analytical skills to understand your surroundings. Further information will be presented to broaden your horizon and help you define your perspectives for opening windows of opportunity by:

- Introducing the concepts of green growth, sustainability, sustainable development, sustainable tourism, sustainable entrepreneurship and sustainable lifestyles
- Presenting facts and figures to provide a picture of the current challenges for transitioning to the Green Economy in Kenya
- Providing tools for enabling entrepreneurial actions and moving ideas for sustainable tourism forward

The activities in this section are designed to provide you with insights on promising practices for Community Based Tourism that can help you think about ways in which sustainable products and services can also support communities’ economic development.
## Module 1 – Kenya Context

### Where Are We Now?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>120</td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>150</td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
</tr>
</tbody>
</table>
Identifying and understanding

- Megatrends influencing global tourism demands from tourists
- Local needs and demands (strengths, opportunities, weaknesses and threats)

Inclusive and sustainable CBT business/product/service

- Managing profit
- Stakeholder satisfaction review
- Best practice development
- Networking and international exposure

Communicating and implementing

- Training for education, capacity building and skills development
- Output and short-term outcomes review
- Consolidation of partnerships
- Development of marketing strategy

Co-creating and testing

- Existing practices of products and services
- Success factors’ review
- Inventory of resources and activity development
- Creation of partnerships

Figure 1.1

Note: The colored areas are the elements of the framework addressed in this module.
As facilitator, it is important that you are familiar with the definitions presented in this section, as it will help you to address some of the basic, frequent questions that participants may ask. You can have a printout of these definitions to make it available to the participants if you wish to do so. This activity is not included as part of the training program although it can help you to support participants in increasing their knowledge about these key topics.

Some basic definitions
This section provides you with some of the core concepts used for the overall development of SWITCH Africa Green and the SUS-TOUR project, which aims to help reach the program’s goals. These concepts are presented here with the purpose of building a common understanding of definitions and global ambitions regarding development in terms of natural resource use, social equity and economic growth. The definitions are clearly referenced and we invite you to review the sources in order to learn more about these concepts and the ways they are related to you and your activities.

Sustainable Development and the Green Economy
As mentioned in the preamble, sustainable development refers to a sustainable society, which is one where individuals have access to goods and services that satisfy all their needs without jeopardizing the well-being of nature and of other individuals. In other words, it is a matter of “responding to the basic needs of all with what we have” (Our Common Future, 1987). For this to become a reality, social structures must reorganize themselves in a way that economic activities no longer depend on the ever-increasing exploitation of natural resources and where notions of re-use, recycling and substitution of technologies and energy sources become the main drivers of production and consumption.

As the planet increasingly provides signs of the urgency of lifestyle changes, it also provides the means to seize entrepreneurial opportunities to solve these problems without sacrificing our quality of life and help to bridge existing prosperity gaps between nations.

Since human activities are intrinsically connected with the local and global natural environment, the necessary conditions for sustainable development to become a reality are:
• A holistic consideration of the impact that each activity has in terms of raw material consumption, waste accumulation, creation of compounds that harm nature and human health, and which affect the way individuals satisfy their needs.
• Human activities that care and respect the environment with a decoupling of the use of natural resources from economic growth.
• An equitable distribution of the world’s resources such that human needs are equally satisfied and ecosystems respected.

Taking sustainable development as the overarching concept, the green economy (GE) is defined as economic processes that result in improved human well-being and social equity, while significantly reducing environmental risks and ecological scarcities. The GE implies a unified suite of economic policies and analytical analyses towards Sustainable Development (UN Secretary-General, 2010). In other words, the green economy implies socially inclusive practices with low-carbon and efficient use of resources (UNEP, 2012).

Sustainable Tourism
Tourism is one of the fastest and largest growing industries worldwide. Its speedily expansion had derived important sources of income, employment and even wealth in various nations whilst also posing severe threats to ecosystems and societies alike (UNWTO, 2001).

Tourism activities have to be coherent with the principles of sustainable development. Thus, it should go beyond seeking to minimize local impacts, as it also entails reducing poverty through engaging the local communities in an active, participatory way (CDE, 1999).
The concept of sustainable tourism, as developed by the United Nations World Tourism Organization (UNWTO) in the context of the United Nations sustainable development process, refers to tourism activities “leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems” (UN, 2001a).

**Community Based Tourism, Eco-tourism and Green Tourism**

These three concepts have a common denominator. This is: awareness of the impacts of tourism on the environment. The activities carried out under these three schemes convey high exposure to nature and appreciation of the ecosystems, such as conservancy activities and rural tourism. The main difference between these three schemes lies in the ways that communities are involved and how social impacts are considered and distributed.

<table>
<thead>
<tr>
<th></th>
<th>Green Tourism</th>
<th>Eco-Tourism</th>
<th>Community Based Tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appreciation for</td>
<td>High</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>environment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social inclusion</td>
<td>Low</td>
<td>Medium</td>
<td>High</td>
</tr>
<tr>
<td>Ownership</td>
<td>Not specified</td>
<td>Not specified</td>
<td>Community management</td>
</tr>
<tr>
<td>Main activities</td>
<td>Appreciate the beauty of natural areas without damaging them (preservation)</td>
<td>Visit relatively undisturbed natural areas</td>
<td>Increase visitor awareness about the local ways of living and interaction with nature</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Some involvement of communities</td>
<td>Local population participates in the activities with the visitors</td>
</tr>
</tbody>
</table>

Source: (UNWTO, 2015)
## MODULE 1 – KENYA CONTEXT

### WHERE ARE WE NOW?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>10</td>
<td>Provide a quick overview of facts and figures about Kenya’s current reality, particularly related to CBT</td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td>180</td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>150</td>
<td></td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
It is important to have an initial notion of where you are standing in order to find out ways to achieve your objectives. In the context of this training, you will have the opportunity to spend some time exploring the current conditions of tourism in Kenya in order to perform an analysis that will let you develop your CBT product/service strategy.

The information below is a short summary of the report “Status of Community Based Tourism in Kenya” created in 2015 with the purpose of introducing the opportunities, challenges and overall picture of CBT in the country. For further information about the sources please visit the references section in this workbook. The full report is available on the downloads section of the project website. This information has been introduced into this manual with the intention of supporting you in the facilitation of discussions for the creation of the SWOT analysis. You can use this information as reference only or provide it directly to the participants of your training. If you choose the latter, it is suggested that you ask the participants to brainstorm about how SUS-TOUR can help addressing the issues mentioned in the report.

Quick facts about tourism in Kenya

Kenya has 29 national parks including 5 marine parks, 22 game reserves, and another 5 marine reserves. The parks cover 7.7% of the country. In addition, there are more than 100 community wildlife conservancies providing space for wildlife to roam freely beyond the national parks and reserves. This strong conservation tradition has been a bonus for tourism. Kenya also has abundant water resources making it possible to offer water-based activities. The Great Rift Valley, and its abundant bird life, is unique as are the tropical forests and mountains.

According to the Kenya National Bureau of Statistics (2015 survey), tourism continued being an important source of foreign exchange earnings in 2014. This is despite a decline in the performance of the sector owing to a number of factors, among them insecurity, adverse travel advisories and the spread of Ebola in West African countries. Consequently, the tourism industry earnings decreased by 7.3% from Ksh 94 billion in 2013 to Ksh 87.1 billion in 2014. In terms of employment, it is estimated that tourism accounts for 9.2% of employment, translating to nearly 550,000 employed individuals in 2014. UNWTO places tourism in Kenya in second place after agriculture in their 2010 tourism report.

Kenya always has been and still is predominantly a safari and beach destination. The main tourism product is wildlife safaris, sun and sand (Kenya Tourism Board). However, visitors are currently consuming culture and community based differentiated products as add-ons. The new travel trends point to a quest for adventure. Following the trends in the industry, the tourism board indicates the need and opportunity for product innovation.

Tourism products and services

Product development is predominantly a private sector affair. The government and tour operators trust investors to develop the right product for the market. The government participation is in quality control to ensure the product meets certain prescribed standards.

Consumption patterns of CBT products are erratic. It depends on the type of product/service offered. Cultural crafts are consumed by both the international and local markets. There are high-end crafts that are predominantly consumed by the international market, while others find their way into mass markets and shopping malls in Nairobi. An example of the high-end crafts is the Basecamp Maasai Brand products that are rarely sold locally. Most CBT products metamorphose into different things at different times of the year, and
with engagement of different partners. This challenge is related to the history of CBTs and their relationship with donor agencies. The choice of products is not determined by demand or market trends or market research. As such, most products remain unknown for a long time because they look for the market after establishing themselves.

The situation is, however, different where a community enters into a partnership with external investors. Here, investors conduct market research and develop products to meet market needs. The more successful CBTs are those that are in partnership with external investors and those that are hand-held by ‘big brothers’ who can either be NGOs and/or other private sector organizations who support the CBTs as part of Corporate Social Responsibility (CSR).

**Geographical distribution of CBTS and nature of their business**

Most initiatives are found along established tourist circuits. This confirms the thinking that CBTs are add-ons to mainstream tourism products. According to FECTO, communities that are most likely to adopt CBTs are found along the main tourism circuits. The areas where CBTs have been long established include Narok, Amboseli, Samburu, Coast, Taita Taveta, in Western Kenya around historic sites or forests, or the lake and around Mt Kenya and recently Laikipia.

Most of the CBTs are a mix of business and social development projects. This is because their initial investment capital is mostly provided by NGOs or through cooperative savings. The job titles of CBT officers attest to this. In the cases reviewed, there was a mix of several other activities apart from business and the funding was mainly from NGO sector.

**Pricing, market access and barriers**

There is a general agreement that CBT products are cheap, a perception challenged by the fact that there are high-end, expensive CBT products. Tour operators are ready to pay 10 times more to enter a national park/conservancy compared to what they would pay to enter a community conservation area managed by the community. Traditional crafts fetch up to 5 times more in a lodge than in a community craft center. The variation in pricing is as a result of perceptions that CBT products are of poor quality. CBTs have not been successful in using traditional marketing channels like travel brokers. Few of them have capacity to enter into business agreements.

---

1 What special interest groups (SIG) and stakeholders have in common is that both are groups. SIG actively pursue their own interests since they are sectors of the population that can be well represented by formal organizations with mission statements and explicit objectives (i.e. lobbyist, human rights activists). Stakeholders may include organizations and agencies as well as individuals (Levine, 2014).
**Future Opportunities for CBTs**

There are several opportunities for the future of CBTEs. These include:

- **Availability of support bodies like Ecotourism Kenya, FECTO & KECOBAT.** Other new associations like Kenya Association of Women in Tourism (KAWT), whose main mandate is to encourage women to tap into the tourism industry by providing incentives to students who choose tourism and hospitality related courses and lobbying for affirmative action towards women-led tourism businesses, are promising. A large percentage of members of the communities that form CBTs are women. This is because they evolve as self-help groups in rural areas.

- **The need for an authentic product to complement Kenya’s traditional beach and safari product.** The tourism strategy outlines clearly the need for alternative niche products.

- **The growth of online booking and independent travelers.** This will address the challenge of perceptions by tour operators who avoid dealing with CBTs. They can reach the market directly. It is important to note that the selection of marketing and sales channels is crucial for addressing this opportunity.

- **Wide access to and increased use of technology, especially Internet and social media, in African countries including Kenya is an opportunity to share CBT products.**

- **Improved infrastructure, especially road networks to most tourist destinations, has opened up access to CBTs.**

- **Tourism curriculum in most tourism training institutions is now offering relevant courses in tourism and CBT is covered under sustainable tourism.**

- **Legal frameworks in place by the government through the Ministry of Licensing, Registration, Regulations and Recognition as support bodies are a new opportunity for CBTs to rebrand and integrate.**

- **Homestay concept is becoming more attractive to tour operators.** Some tourism operators are packaging CBTs as an alternative way to stabilize their visitor numbers and avoid over-reliance on international visitors.

- **The growth of middle-aged tourists who are driven by adventure.**

- **Devolved governance system in Kenya is an opportunity for CBTs, as every county strives to develop their own niche tourism products.**

- **Volunteering and partnering opportunities.** Voluntourism is burgeoning. It has been noted that volunteers form a critical percentage of consumers of CBT products since this offers opportunities to work with a community. It is relevant to note that this is an activity that has been heavily criticized among many civil society organizations in Europe, and therefore, this opportunity should be explored carefully.

- **Diverse publicity channels giving attention to sustainable tourism.** For example, the Sustainable Report by Sustainable Travel & Tourism Agenda (STTA) focuses on sharing practices on sustainable tourism, amongst others.

- **Existing successful model of industry organizations in Kenya by private sector (e.g. KATA, KATO, ECOTOURISM KENYA).**
## CBT OPPORTUNITIES

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>A</td>
<td>B</td>
</tr>
</tbody>
</table>
| **Introduction** | Icebreaker  
Training overview  
Vision 2030 | 60 | 60 |          |
| **Module 1. Kenya Context** | Kenya Today  
CBT opportunities  
SWOT | 10 | 15 | Understand more about CBT practices around the world by learning about the challenges and solutions different communities addressed |
| **Module 2. CBT Success Factors** | Identification  
Assimilation | 120 | 180 |          |
| **Module 3. Idea generation** | Stakeholder mapping  
From expectations to products  
Consolidation of ideas | 150 | 240 |          |
| **Module 4. CBT Business Plan** | Introduction of the Business Canvas  
Drafting the plan  
Preparation for CIW | 90 | 240 |          |
| **Module 5. Training skills** | Self-assessment  
Training flow  
Skills building  
Dry runs | 140 | 140 |          |
| Feedback and next steps | | 15 | 15 |          |
| Closing ceremony | | 30 | 30 |          |
Kenya is one of many nations with rich natural resources and cultural heritage, and thus, there is no doubt about its potential for developing high-quality CBT products. The objective of this training is to empower you as an agent to support different groups of people in identifying the opportunities that CBT conveys.

This part of the training aims at providing the participants with a short overview of how various communities around the world have developed different tourism-oriented products and services. The list below contains some of the most notorious practices. Three of these short videos will be shown during the training to inspire the participants and address an emotional level for starting the analysis of their own communities.

**Africa**
- Kakamega Environmental and Educational Program (KEEP) – Kenya: www.keep-kakamega.or.ke
- Karibuni EcoCottages – Kenya: www.karibunicottages.com
- Pearls of Uganda – Uganda: http://www.pearlsofuganda.org/ (incl Video)

**America**
- Pueblos Mancomunados – Mexico: www.sierranorte.org.mx (video available at SUS-TOUR website)

**Asia**
- Chambok- Cambodia: http://chambok.org/ (incl video)

**Europe**

**Global**
- Village walks India and Ethiopia: http://www.vilageways.com/
## Module 1 – Kenya Context

### SWOT Analysis

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total Length (Minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>40</td>
<td>Understand the perks of a SWOT analysis and learn how to perform this analysis in the context of CBT</td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>150</td>
<td></td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
There are many tools to support community analysis and they all differ in levels of participation from the local people. SUS-TOUR proposes the use of a SWOT analysis, as it is a useful assessment technique that is simple to perform and can be used throughout the entire development-testing-implementation process of CBT products/services. Moreover, it is a tool that helps build dialogue among different stakeholders participating in the training.

A SWOT analysis offers a simple communication material that helps to:

- Adjust and refine plans any time during the different stages of your product/service/solution development and implementation. As it can be revisited to track progress, new opportunities may emerge as threats are overcome (and vice versa);
- Make decisions about the best path for your initiatives as you can check your choices against the context of existing threats and weaknesses; and,
- Determine when change is feasible since it provides an inventory of both strengths and weaknesses that can help in establishing your priorities.

**Understanding a SWOT analysis**

Standing for **Strengths**, **Weaknesses**, **Opportunities** and **Threats** to your community/products/services/businesses/etc., the SWOT analysis is a tool that supports strategic plan development and decision making.

The SWOT analysis is meant to provide a realistic recognition of existing weaknesses and threats in order to be able to build solutions upon your existing strengths and opportunities. When developing CBT products/services, change is inevitable. Therefore, it is important to be aware of what are the internal and external factors that may influence your work.

By understanding the factors affecting your communities, you can also position yourself better to start developing solutions. Your SWOT reflects your current position and enables you to be open to the possibilities offered by a threat or a weakness. It also recognizes opportunities that can become a threat (if everyone else sees the opportunity and plans to take advantage of it as well, thus increasing your competition). Don’t be surprised if your strengths and weaknesses don’t precisely match up to your opportunities and threats. You might need to refine, or you might need to simply look at the facts longer, or from a different angle.
ACTIVITY – CREATING YOUR SWOT ANALYSIS  
(TOTAL TIME: 30 to 40 minutes for short session – A, 50 minutes for a long session – B)

Modality B is recommended when delivering the training to a community, as this is an activity for them to get their business plan started. The analysis should be done on the conditions for CBT development in their community. For trainings with people from different locations, session A is enough as the SWOT is done for CBT on the national level.

Objectives

- Introduce participants to the SWOT methodology for CBT
- Perform a SWOT analysis

Time allocation

- 5 minutes to explain the activity and form 8 groups (depending on the size of the group, they should be balanced to discuss each of the SWOT components)
- 20 minutes to do the analysis (Modality A)/ 40 minutes to do the analysis (Modality B)
- 20 minutes for recap and introduction of the next session

Materials

- SWOT guidelines (provided as hand out)
- Pens/markers
- SWOT titles (1 or 2 Strengths, 1 or 2 Weaknesses, 1 or 2 for Opportunities, 1 or 2 for Threats)

Room requirements

Tables for the teams to work separately

People requirements

- 1 trainer
- 2 facilitators supporting the discussions

Process description

- Trainer welcomes the group and introduces the SWOT template, explaining the characteristics of the SWOT analysis
- The group splits in 4, 8 or 12 sub groups (depending on number of participants). One group will analyse the Strengths, another the Weaknesses, another the Opportunities and another the Threats. If there are 8 or 12 groups, there will be 2 or 3 groups discussing one specific section of the analysis
- The groups are provided with the SWOT guidelines and the title of the element of the analysis they will develop
- The groups have 20 (Modality A) or 40 (Modality B) minutes to brainstorm about the SWOT of Kenya as a country and in context of tourism activities
- It is suggested that the group prepares one flipchart with their outcomes

If doing Modality B,

- Ask participants to answer these simple questions: (1) what are the strengths and weaknesses of your community and (2) what are the opportunities and threats it faces?

Reporting methodology

- One speaker per group will present to the rest of the plenary
- In case of two or three groups addressing the same part of the SWOT, after the first one is done presenting, the other groups are invited to add any information that the first group may have not had in their presentation and the facilitator adds this topic to the list on the board or flipchart. There is no need to repeat what was already mentioned
- Towards the end of the session, the group will have a big SWOT analysis comprising the 4 flipcharts. The analysis is to remain visible throughout the workshop.
Community Based Tourism in Kenya

This project is funded by the European Union

MODULE 1 – KENYA CONTEXT

SWOT TEMPLATE

<table>
<thead>
<tr>
<th>HELPFUL (for your objective)</th>
<th>HARMFUL (for your objective)</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTERNAL (within your community)</td>
<td></td>
</tr>
<tr>
<td>STRENGTHS</td>
<td>WEAKNESSES</td>
</tr>
<tr>
<td>EXTERNAL (outside your community)</td>
<td></td>
</tr>
<tr>
<td>OPPORTUNITIES</td>
<td>THREATS</td>
</tr>
</tbody>
</table>

SWOT GUIDELINES

**INTERNAL FACTORS**
(Strengths and Weaknesses)

These include your resources and experiences. General areas to consider:

- Human resources - staff, volunteers, board members, target population
- Physical resources - your location, building, equipment
- Financial - grants, funding agencies, other sources of income
- Activities and processes - programs you run, systems you employ
- Past experiences - building blocks for learning and success, your reputation in the community

Don't be too modest when listing your strengths. If you're having difficulty naming them, start by simply listing your characteristics (e.g., we're well known destination). Some of these will probably be strengths.

Identify strengths and weaknesses from both your own point of view and that of others, including those you serve or deal with.

Do others see problems—or assets—that you don’t? You may know already if you’ve listened to those you serve.

**EXTERNAL FACTORS**
(Opportunities and Threats)

Forces and facts that your community does not control include:

- Future trends in your field or the culture
- The economy - local, national, or international
- Funding sources - foundations, donors, legislatures
- Demographics - changes in the age, race, gender, culture of those you serve or in your area
- The physical environment (Is your building in a growing part of town? Is the bus company cutting routes?)
- Legislation (Do new federal requirements make your job harder...or easier?)
- Local, national or international events

Cast a wide net for the external part of the assessment. No organization, group, program, or neighborhood is immune to outside events and forces.

Consider your connectedness, for better and worse, as you compile this part of your SWOT list.
After gaining an understanding of some basic concepts it is possible to realize that sustainability is mainly about human actions and their impacts on societies and ecosystems. Moreover, you also know how important the role of communities is to procure a sustainable growth and management of touristic activities. Considering that socio-environmental concerns related to economic development started to appear in international agendas at the end of the 20th century, practices of sustainable tourism are still in a relatively initial phase, and there is still an important amount of work to be done in order to fully maximize the benefits of engaging communities in the development, management and ownership of products and services that meet the demands of tourists without jeopardizing local practices and the environment.

This module aims at providing you with a more in-depth understanding of how CBT has been evolving in the last couple of years. By learning from the experiences of communities around the world, it will be possible to initialize a creative process to think on sustainable business solutions that can be relevant to your community. The activities of this module will:

- Provide you with a set of tools for performing critical analysis of CBT practices, both positive and not so successful ones;
- Guide you through processes of identification of concrete opportunities for the generation of business ideas; and,
- Allow problem-solving thinking in a systemic, holistic way by performing reviews of commonalities and differences between the analyzed cases and the local realities.

This section details the most needed factors to develop high-quality CBT products and services that are meant to be transformed into potential business ideas.
## WHERE ARE WE NOW?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>120</td>
<td>Be able to identify a successful CBT practice and the factors that are making it have a sustainable impact. Think on the ways that these success factors can be introduced into the communities the participants come from</td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>150</td>
<td></td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
MODULE 2 – SUCCESS FACTORS

Identifying and understanding

- Megatrends influencing global tourism demands from tourists
- Local needs and demands (strengths, opportunities, weaknesses and threats)

Communicating and implementing

- Managing profit
- Stakeholder satisfaction review
- Best practice development
- Networking and international exposure

Stakeholder satisfaction

Local governance and accountability

Inclusive and sustainable CBT business/product/service

Awareness raising

Local leadership development

Analyzing and aligning

- Existing practices of products and services
- Success factors’ review
- Inventory of resources and activity development
- Creation of partnerships

Co-creating and testing

- Training for education, capacity building and skills development
- Output and short-term outcomes review
- Consolidation of partnerships
- Development of marketing strategy

Figure 2.1

Note: The colored areas are the elements of the framework addressed in this module.
This module goes one level deeper in the understanding of the nature of business development, particularly the role of mini-, small- and medium-sized enterprises in the context of a community business (social enterprise). This is why the information below is presented as a reference to support the trainers in explaining some of the key terminologies used throughout SUS-TOUR. The Best Practices Manual for Community Based Tourism Enterprises (CBTE) is available for download on the project’s website.

Some basic definitions

Mini, Small and Medium Enterprises (MSMEs)

These types of businesses have become the focus of attention for a wide array of stakeholders interested in market-oriented solutions to poverty and economic development. The Kenyan government has defined an SME as a formally registered business with between 1 to 150 employees and has a turnover of between 8 to 100 million Kenyan Shillings. It is important to note that the adoption of e-commerce and mobile technology is seen as helping to develop this sector in the country (Warwick University, 2012).

The community as a social enterprise

The examples presented in the previous module showed how community based enterprises improve the life of a community through the development of one or various business models. It is important to differentiate between a private enterprise, with the objective of creating private gain, and a community enterprise, which possesses various characteristics that makes them unique:

- They are **led and owned by the community**, meaning that local people play a leading role in the enterprise, and the assets belong to the community. Therefore they can’t be sold off for private financial gains. This also means that their boards are accountable to the communities, mainly because the directors are representatives of the communities;
- They are **self-sustaining and able to generate profits** to be reinvested and/or distributed among the community. Their financial stability comes from their business practice. Even if at the beginning they receive support from a third party, they are able to sustain themselves after a while;
- They are **sustainable**. That is, they equally tackle environmental and social problems in their area. Because of their nature, they are also called social enterprises as they can generate many jobs among the community, return benefits to the community beyond those individuals directly employed, and can be run as a cooperative or as a member-based association. Some of the characteristics of Community Based Tourism Enterprises is that they:
  - Allow people to develop as economic decision-makers;
  - Are able to devise strategies to cope with competition and can be developed as part of local development plan, including hybrid models such as collaboration between governments or NGOs with citizens;
  - Add value to agricultural produce;
  - Allocate surpluses to community projects and other spin off community enterprises; and,
  - Provide purposeful employment and cash income for marginalized individuals and actively engage citizens.
The Community Based Tourism Enterprise

This text is an excerpt of the Best Practices Manual for Community Based Tourism Enterprises (CBTE) that we invite you to download from the SUS-TOUR website for strengthening your knowledge in the topic. Community based tourism is believed to have the potential to provide some unique opportunities for communities by offering financial gains while enhancing their involvement and participation in tourism planning and development in their areas in innovative ways. It has primarily two goals:

- Improving the quality of life of the local residents by optimizing their economic benefits while protecting their traditional ways of life and natural resources; and,
- Empowering community members as they develop and operate tourism activities, also being responsible for the management of resources using local labor and directing the income and revenue to the local population.

More details about these skills and how to enhance them among the training participants can be found in Module 5.

What is leadership?

It is a process of influencing the activities of an individual or group towards the achievement of a goal. Elements of leadership include the leader, the followers, and the process of influencing goal-directed behavior. Leadership involves inspiring, motivating, directing and gaining the commitment of people.

What is governance?

Governance entails establishing chains of responsibility, authority and communication to empower people (decision rights). It also entails establishing measurement, policy and control mechanisms to enable people to carry out their roles and responsibilities. Governance is the responsibility of the committee/board of the organization.

Principles of Good Governance

**Effective Governance**

For effective governance, organizations must have:

1. A governing body such as a committee or board
2. Regular meetings/conduct of meetings
3. Fair elections, representation and participation
4. Responsive committee and committee members
5. Rule of law as guided by their constitutions, by-laws, procedures and organizational policies
6. Accountability in all their operations

**Strong Financial Oversight**

For organizations to have strong financial oversight, the following must be observed:

1. Keep proper financial records
2. Operate within a budget
3. Have policies and procedures on travel and other expenses
4. Be compliant to donor requirements
5. Be accountable to members and stakeholders

**Legal compliance**

Organizations/committees must operate within the law and comply with:

1. Public disclosure
2. Their code of ethics
3. Conflict of interest requirements
4. Protection of assets
5. Whistle-blower policy
MODULE 2 – SUCCESS FACTORS

What is management?
It is the process of making and implementing decisions and covers such activities as planning, organizing, staffing, controlling and leading. Management is about planning, controlling and directing. It also includes coordination, delegation, team building, experience sharing, reporting and tracking progress. The responsibility for management lies with the staff of the Community Business Operations, primarily the Manager/Coordinator.

Difference between governance, leadership and management
1. Leadership is the process of influencing the activities of an individual or group towards the achievement of a goal.
2. Management is the process of making and implementing decisions.
3. Governance determines who is responsible for making the decision.

Strengthening Managerial Structures
It is important to understand the transitions needed in an organization in order to plan its development and manage all processes accordingly, particularly when transitioning from an initiative into a proper business.

Founder’s Syndrome
Founder’s syndrome (or Founderitis) is a label normally used to refer to a pattern of behavior on the part of the founder(s) of an organization that, over time, becomes an impediment to the successful accomplishment of the organizational mission.

Signs of Founder’s Syndrome in Organizations
1. A good organizational constitution and organizational policies
2. Organizational policies governing human resource, finance management, fund mobilization, implementation approaches, communication with members and partners, board activities, etc.
3. Developing a clear organizational strategy
4. Awareness of the transition system by all members
5. Early preparation for transitions/transition planning

How to Deal with Founder’s Syndrome
1. A good organizational constitution and organizational policies
2. Developing a clear organizational strategy
3. Awareness of the signs of Founder’s Syndrome
4. Early preparation for transitions

Succession Planning
It is a process for identifying and preparing internal personnel with the potential to fill key or critical organizational positions. One fact that we have to contend with is that people move on. We need to strategically mentor and coach other potential leaders within our organization for purposes of continuity.

Importance of Succession Planning
1. Minimizes risk
2. Prepares the organization to capture opportunities
3. Supports organizational growth
4. Reduces compromise on client and organizational relationships
5. Reduces the time and effort to recruit and train replacements

Steps in Succession Planning
Succession planning is part of workforce planning. Its focus is on assuring that appropriate bench strength is in place for replacing critical positions:
1. Identify key/critical positions
2. Conduct position analysis
3. Develop succession plan
4. Monitor, evaluate and revise

Succession Planning Approaches
1. Strategic leader development
2. Emergency succession planning
3. Departure defined succession planning
## MODULE 2 – SUCCESS FACTORS

### CBT Success Factors

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>A</td>
<td>B</td>
</tr>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td>60</td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td>90</td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>150</td>
<td>240</td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td>240</td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
<td>140</td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td>30</td>
</tr>
</tbody>
</table>
Success Factors

In general terms, success factors are the combination of important facts and happenings required in order to accomplish one or many desirable goals. Communities conducting community based tourism can improve their operations and practices and increase their chances of success by observing the following crucial factors:

- Participation in the decision making process
- Local ownership
- Collective responsibility
- Local innovation
- Sharing of resources
- Sharing of benefits among members
- Leadership and management
- Partnership and outside support
- Achieving authenticity
- Achieving distinction
- Business skills
- Compliance with governance structures

In order to achieve these success factors, you have to consider the following aspects:

1) Is tourism wanted by the host community? How will you manage the expectations? The first condition is to enable participation in decision making processes to ensure local ownership and collective responsibility. Are the local non-participants supportive? Is there established interest for tourism amongst the host community? Without local support there is no long lasting successful product! Moreover, it is important to understand that successful CBT is not a "magic remedy" to the problems of the community but rather the result of commitment and hard work.

2) Make sure there is tourism appeal and that tourism is possible to take place. Ask yourself, are there any attractive and competitive products that may be wanted by customers (do you know what customers want)?

3) In relation to the product, it is important that you make sure that what the community is offering is actually sustainable (that is, that it has a positive social and economic impact without harming the environment or at expense of other people’s well-being), particularly because you don’t want your services to be considered a “green-washing” practice?

4) What is your commercial viability? You need to consider the product/service quality, capacity and price, as well as important elements such as health and safety procedures and conditions.

5) Use the right marketing techniques. It is important that you understand your target market and establish interest for the product. In other words, this is to make the market WANT your product. As a starter, ask yourself, do you have an established communication platform such as regular meetings or communication channels?

6) Access to market. This is really important. How easy is to reach your product/service? This considers both the physical location and the proximity to the existing tourism market.

7) Policy frameworks and land tenure. Before you kick off any CBT product/service, you have to make sure you’re complying with all the regulations needed and that the use/ownership of the land is clearly understood and acknowledged by all the involved parties.

8) Skills needed to meet your customers' expectations. This includes questions from language to Internet access, guides, service providers, etc.
Below you will find some of the most relevant considerations that different entrepreneurs reflected on when interviewed about what made their ventures successful and what they identified as the most common mistakes that anyone willing to provide a new product/service is likely to fall into. Pay attention to these, as the participants of the training may discuss them during the success factor analysis.

**Learning from mistakes**
Establishing and running a start-up business is a process of continuous learning for the communities. They will surely face many difficult situations at every stage of the process, but the most intense challenges will likely be during the first months. Below are the most common mistakes made by social entrepreneurs:

**Common mistakes before the start-up of the venture**

- **Too little research on market’s viability** – A common mistake of new entrepreneurs is to quickly implement an idea that is not really viable. Often the motivation is an illusion of quick money. Starting a business requires large amounts of time, energy and capital.

- **Too little primary research** – Of course, someone willing to develop a CBT product/service has to be keen on starting the new initiative as soon as possible. But without a certain level of consideration, there is a very real risk that the venture will be over in a very short time. A detailed and well thought-through business plan is essential, including a thorough market analysis, demographic market data, and an understanding of external influences. Being unprepared to face problems that arise because of incomplete background research can make an immense and often decisive difference. Although, it is not the research per se that sets the mark but overlooking the outcomes of the analysis. It can be tempting to overlook unfavorable information, but if the indications are not positive it can be best to discard your idea.

- **Focusing on profit rather than value** – It is a common mistake to focus on making money rather than creating value. A CBT solution that does not fulfil a demand, but aims rather to generate profit without providing true value is unlikely to be viable in the long run. The more you are aware of the value the business creates the more feasible the idea becomes. In fact, this is one of the key aspects for contributing to sustainability. When producing things without value creation as a driver, the main outcome is a huge waste of resources, whereas with value creation, there is benefit for the entrepreneur but also for customers and ultimately for the environment.

- **Setting unrealistic expectations** – Many people often formulate unrealistic objectives because they are either too ambitious in terms of sales to be achieved or profit to be made in the short-term, or they simply try to accomplish too much at the same time. Unrealistic expectations not only lead to disappointment and frustration, but are also detrimental to sound management of financial and other resources.
Common mistakes *during the start-up process*

- **Underestimating financial requirements** – Without a detailed calculation of all costs, there is a high risk of ending up insolvent even before the business has fully started. Unforeseen financial requirements are likely and should be incorporated in the planning process. Another frequent mistake is to spend unnecessarily once funding has become accessible without sufficient consideration for long-term financial needs.

- **Failure to draw on experts’ help** – Starting up a business requires quite some expertise. New, inexperienced people are well advised to contact professionals regarding decisions that require expertise beyond their own knowledge. Also, in most cases it is a mistake to randomly ask family members and friends for help because unless they are entrepreneurs themselves, they are very unlikely to possess the necessary expertise or background.

- **Addressing too many consumer groups** – Many people make the mistake of over-marketing themselves and target too many client groups at the same time. It makes no sense to try to reach everyone. Rather, you should be clear about a reasonable target group and focus on this group only. Everything else will not be effective or efficient in the long run. Patience to develop the business at its own pace is crucial.

Common mistakes *after starting up the business*

- **Doing everything by oneself** – After overcoming all obstacles, it may be difficult to delegate certain tasks or responsibilities. That is why building an effective team is so important during the first stages. When there are effective structures and procedures, delegation should not be difficult.

- **Hiring the wrong people** – It might seem convenient at first sight to hire relatives or friends. Yet, experience shows that new entrepreneurs in particular have much more difficulty with firing than with hiring. Having brought somebody on board who is in fact not suitable for the job creates frustration and demands time and energy that could have been better invested in the business itself.

- **Making short-term decisions rather than focusing on the long-term** – If the aim is to have a long lasting, profitable CBT business, it is a mistake to grab every short-term opportunity to make extra money instead of sticking with a long-term strategy. Many new entrepreneurs fail to achieve their initial objectives because they lose sight of their actual business concept and end up exhausting their time and financial resources. Another aspect of the mistake related to short-term decisions is to be all too frugal regarding certain investments. Sacrificing quality for the sake of maximizing short-term financial profit is not only unsustainable, but will lead to failure in the long run.

The information and activities you find in these three training packages are a guideline created to empower you with the tools to succeed on your journey to create a sustainable business – a business that will last and create a positive impact on the environment, on your community and for your pocketbook. There are many opportunities you can undertake to transform your idea into reality. We hope the information in these training packages will serve you well as you develop your entrepreneurial plans for your, and ultimately our, common futures.
### WHERE ARE WE NOW?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>A</strong></td>
<td><strong>B</strong></td>
<td></td>
</tr>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td><strong>Module 2. CBT Success Factors</strong> →</td>
<td><strong>Identification</strong></td>
<td><strong>50</strong></td>
<td><strong>80</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Assimilation</strong></td>
<td></td>
<td><strong>Participants discuss the success factors and analyze real cases</strong></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>150</td>
<td>240</td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td>240</td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
<td>140</td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td>30</td>
</tr>
</tbody>
</table>
MODULE 2 – SUCCESS FACTORS

The activity proposed is intended to be an introduction to different CBT practices around the world. The cases analyzed represent three types of initiatives: those that had successfully flourished, some that are still in an early development stage and some that had to stop because of different circumstances.

It is strongly recommended that even after the training, you and the participants of your trainings take some time to check all the cases and get familiar with them, as they may portray useful insights for your own projects.

The cases consist of 2 documents, both available in Annex B: First, a “story” which illustrates the case with images and a straightforward narrative (story-telling). This document is to be handed to the participants for their analysis as described in the activity. The second document is an in-depth analysis of the case. It was created using public sources and its objective is to provide you, the trainer, with a detailed overview of the practice. This document is not intended to be distributed to the participants, as it is a key for you to support their discussions.

ACTIVITY – LEARNING FROM OTHERS’ EXPERIENCES. CASE ANALYSIS
(TOTAL TIME: 50 minutes – Modality A / 80 minutes – Modality B)

Objectives
- Get familiar with different types of Community Based Tourism products and services offered around the world
- Learn to identify the success factors needed for CBT to flourish

Time allocation
- 2 minutes to explain the activity
- 3 minutes to create 5 to 10 groups (depending the number of participants)

Materials
- CBT cases (for Modality A: 1 case per team, for Modality B: 2 cases per team –one positive and one for improvement). Please note that not all the cases need to be successful examples. Unsuccessful ones will also be useful for the analysis
- Success Factor Templates as hand-outs. 1 per team (if analyzing one case) or 2 (if analyzing two cases), in A4 size printout

Room requirements
- Enough tables for every team to be able work separately

People requirements
- 1 person to moderate the session
- 1 or 2 facilitators to support the teams in their discussions

Process Description
- Moderator explains the activity and each facilitator will have already the cases to be analyzed per team
- When teams are formed, they’re given the cases and they have 10 minutes to go through them
- After reading the cases, the teams are given the success factor template and they have to fill it in using the information they learned from the cases
- It is important that when they check the success factors of the practices, participants ask themselves whether the action/product/service described in the case could be applicable to Kenya or to their community
MODULE 2 – SUCCESS FACTORS

Reporting Methodology

• Upon finalizing the review, participants are invited to add the scores of the practice.
• The moderator will create two lists, one for the elements that meant a higher score and one for the ones that meant a lower score. Then, s/he calls for the cases that scored between 41 to 60 points and asks the participants for the elements that make the case get a particular score. For Modality A, it is enough to write a list of the elements. For Modality B, it is suggested to write down the name of the case as other participants may want to read it afterwards.
• The moderator calls for the cases that scored between 19 to 41 points and asks participants to share what were the highest scoring elements and the lowest ones, writing both on the respective lists.
• The moderator calls for the cases that scored below 18 points and asks for the elements that contributed to this score.
• The reflection will show that the elements that contributed to the highest scores are normally the same ones that are missing in the cases with lowest scores.

Note: if the participants already have their own ongoing projects, they are invited to use the template for reviewing their initiatives. They don’t need to share the scores with the group, as the analysis helps them to formulate their queries to the coaches supporting the preparation for the CIW and further development of their initiatives.

Critical Success Factors Template

Please assess the following critical success factors for your CBT product (5 fully covered; 4 almost covered, 3 partly covered, 2 somewhat covered and 1 not covered at all)

<table>
<thead>
<tr>
<th>Reason of score given</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participation in the decision making process</td>
</tr>
<tr>
<td>Local ownership</td>
</tr>
<tr>
<td>Collective responsibility</td>
</tr>
<tr>
<td>Local innovation</td>
</tr>
<tr>
<td>Sharing of resources</td>
</tr>
<tr>
<td>Sharing of benefits among members</td>
</tr>
<tr>
<td>Leadership and management</td>
</tr>
<tr>
<td>Partnership and outside support</td>
</tr>
<tr>
<td>Business skills – the CBT project does have the skills needed to run a business (business planning, marketing, finances etc.)</td>
</tr>
<tr>
<td>Achieving authenticity – do you have clearly defined Unique Selling Points?</td>
</tr>
<tr>
<td>Achieving distinction – is the destination attractive enough?</td>
</tr>
<tr>
<td>Skills – does the community have the skills needed to meet customer expectations?</td>
</tr>
</tbody>
</table>

THE CASES FEATURE IN THE MODULE’S ANNEX B
The process followed through this training takes you from the vision of Kenya in 2030, where the economy thrives, communities’ well-being is improved and natural resources are taken care of, to today’s current reality, particularly in the area of Community Based Tourism.

The previous modules were an introduction to the world of CBT practices, including some challenges and opportunities to develop and offer successful products and services. The objective of these activities were twofold: to realize the untapped potential of CBT and to identify the elements that are familiar to your local context. Thus, you may already have some ideas of what you would like to do in your communities and may even have notions of what is feasible and what is not. The activities of modules 1 and 2 had an “external-internal” approach. That is, you received information to be analyzed and internalized, and created knowledge that you can apply later on.

Module 3 is an immersive module, in that the activities now will have a different approach – an “internal-external” one. This means that now you will be producing the content and sharing it with others around you in order to co-create specific ideas on solutions (products and services) for your communities and markets. The activities of this module will:

• Guide you through a creative process to identify your key stakeholders, opening your mind to different realities and encouraging creative thinking;
• Generate new ideas for sustainable CBT products and services; and,
• Align the outcomes of your SWOT analysis with the ideas you created in order to start a feasibility check and streamline the most viable ideas to be turned into potential CBT products and services.
### MODULE 3 – IDEA GENERATION

**WHERE ARE WE NOW?**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td>Icebreaker Training overview Vision 2030</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td><strong>Module 1. Kenya Context</strong></td>
<td>Kenya Today CBT opportunities SWOT</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td><strong>Module 2. CBT Success Factors</strong></td>
<td>Identification Assimilation</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td><strong>Module 3. Idea generation</strong></td>
<td>Stakeholder mapping From expectations to products Consolidation of ideas</td>
<td>150</td>
<td>Co-generate business ideas for potential CBT products and services based on the understanding of different stakeholders’ demands and needs and integrating the learning from previous modules</td>
</tr>
<tr>
<td><strong>Module 4. CBT Business Plan</strong></td>
<td>Introduction of the Business Canvas Drafting the plan Preparation for CIW</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td><strong>Module 5. Training skills</strong></td>
<td>Self-assessment Training flow Skills building Dry runs</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td><strong>Feedback and next steps</strong></td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td><strong>Closing ceremony</strong></td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
MODULE 3 – IDEA GENERATION

Identifying and understanding

- Megatrends influencing global tourism demands from tourists
- Local needs and demands (strengths, opportunities, weaknesses and threats)

Communicating and implementing

- Managing profit
- Stakeholder satisfaction review
- Best practice development
- Networking and international exposure

Inclusive and sustainable CBT business/product/service

- Training for education, capacity building and skills development
- Output and short-term outcomes review
- Consolidation of partnerships
- Development of marketing strategy

Stakeholder satisfaction

- Awareness raising

Local governance and accountability

- Local leadership development

Analyzing and aligning

- Existing practices of products and services
- Success factors’ review
- Inventory of resources and activity development
- Creation of partnerships

Co-creating and testing

Figure 3.1

Note: The colored areas are the elements of the framework addressed in this module
MODULE 3 – IDEA GENERATION

This module will guide you through a stakeholder-oriented idea-generation process to help you in the development of products and services that your community can create and introduce into the market. It is important that the participants of your workshop feel free to explore their creativity and you will find various tips to this end on this section and as part of the module 5.

Some basic definitions
What is an idea?

If you are waiting to have just one good idea before you have any ideas, then you probably won’t have many ideas at all! Besides, you never know if the only idea you have really is a good idea. Therefore, it’s best to generate many ideas and brainstorm a variety of alternatives. According to chemist Linus Pauling, ‘the best way to get a good idea is to get lots of ideas.’

When delivering the training, maybe someone will ask you to provide some definition as to what kind of ideas are expected, so the points below are presented to help you frame your answer:

- Ideas are mental images that we build by combining knowledge, past experiences, observations and instinct.
- Ideas are about making connections between things that we know and things that we may not know, but assume or suspect.
- Ideas are linked to the act of creating something new, at least for the one generating the idea.
- Business ideas are concepts that exploit business opportunities and which result in the creation of value.
- Ideas might be driven by necessity or by a mission to innovate.

Now, the process that has been applied throughout the different activities of this training convey the following flow:

1) Creative observation – having a vision of the future you would like to make happen and the elements needed to get there, how does it look like? How does it feel like? What have others done? What worked for them? What didn’t?
2) Critical reflection – what is happening today? What are the strengths, weaknesses, opportunities and threats that you and your activities may face? What did you learn from the experiences of others?
3) Idea generation – what are the demands and expectations of your different stakeholders? What kind of products and services can you offer? Considering your SWOT, are they feasible?

And on this module, you will provide the participants of your training with a hands-on immersive experience that brings together the experience of cross-disciplinary peers and delves deep into two critical skill sets for business development that are particularly relevant for the success of CBT products and services:

1. Understanding the needs and the demands of all of your stakeholders.
2. Bringing together the notion of feasibility of your ideas in relation to your current context.

When starting a new project, it is important to be aware of the stakeholders affected by one’s actions, and their interests and needs. In other words, it is relevant to understand other perspectives, and to walk in somebody else’s shoes. By understanding other perspectives, you can often see ways to create ideas and to make most of the opportunity.
## MODULE 3 – IDEA GENERATION

### WHERE ARE WE NOW?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>20</td>
<td>Gain a personal understanding of the different needs and demands of all the individuals and organizations in the tourism industry, particularly in the CBT sector</td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td>240</td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
<td>140</td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td>30</td>
</tr>
</tbody>
</table>
MODULE 3 – IDEA GENERATION

Some basic definitions
Who are your stakeholders?

Stakeholders are groups that are affected by your product or service. Of course your community members and your visitors (tourists) are some of the people that are directly connected to your activities. You should also consider a wider group that includes tour operators, government officials, suppliers, product distributors, employees, or any other group that is connected to your community or who has an influence on your activities. Analyzing your stakeholders is important to identify the best potential tourists, business partners and other organizations that can support you. Therefore, you should try to:

• Have a clear picture of every actor that is likely to be influenced by your business.
• Understand their roles and recognize their interests.
• Determine the optimal partners to involve into your business.

For the tourism industry, consumer orientation is crucial for your success and you should always ask yourself:

• What type of person is interested in your product and why? Consider domestic and international customers. Try to understand the normal consumption patterns. Why do consumers behave the way they do? How do consumers use similar products/services? How often? Why and in what ways?
• What would they be willing to pay? Be aware of consumers’ needs and expectations. This will help you to develop a more efficient product or service that will catch the interest of your potential customers.
• What level of style and comfort do they expect? Try to develop an offer that matches the profile of your future customer. This includes aspects such as age, gender, experience and education, among others.
• Define the size of your potential market (number of customers) that you assume will buy your product/service. Compare your expected market share against that of other companies. This will help you design better production plans and develop accurate sales projections.

Of course it is not necessary to start from scratch. Market studies for many industries and products are widely available and these will provide invaluable insights for you. In addition to research, your analysis will be enhanced by reading relevant publications and data collections, observing the behavior of people in your surroundings, conducting focus group studies, or by developing further reaching surveys.

Consumers: What type of person is interested in your product and why (domestic and international)? What would they be willing to pay? What level of style and comfort do they expect?

Suppliers: What services and material do I need? Where can I obtain the required raw materials and needed services? How were those materials produced? How much do they cost? Do these materials require transportation?

Processes: Who can influence your business processes? What are the local regulations? Who is accountable for them? What other actors are on the field? How will my product/service affect the community? What do I need from other members of the community? What processes should be observed (i.e. waste management, access to lands, etc.)?

Distributors: What channels can be used to commercialize my product/service (these could include tour operators, associations and unions, civil organizations)? What channels do they operate? What are the advantages and disadvantages of each channel?
MODULE 3 – IDEA GENERATION

Figure (3.2) provides you with a quick overview of your stakeholders and potential questions you might want to explore when thinking about how they are related to you now and what type of relationship you want to have with them in the future.
MODULE 3 – IDEA GENERATION

ACTIVITY FOR MODALITY A – STAKEHOLDER MAPPING
(TOTAL TIME: 20 minutes)

Objectives
• Understand the different needs and demands of stakeholders that are more directly connected to the success of CBT initiatives
• Start visualizing potential products and services that can meet the demand of these stakeholders

Time allocation
• 10 minute presentation
• 5 minute Q&A

Materials
• Presentation showing the stakeholder map (Fig 3.1)
• Flipchart with the questions: WHO? WHAT? HOW?

Room requirements
People sitting close to the facilitator

People requirements
• 1 person to moderate the session
• 1 person to write the input into the flipchart

Process description
• After showing the slide with the stakeholder map, the moderator asks the participants to think on:
  o Who do they need to work with in order to get a CBT initiative working?
  o What are they going to do for and with this person/entity they consider important for the CBT?
  o How are they going to engage with these entities (i.e. is there an association that supports...)?

Reporting methodology
• The outcome can be exhibited next to the SWOT in order to provide visual support for the development of business ideas

ACTIVITY FOR MODALITY B – STAKEHOLDER MAPPING
(TOTAL TIME: 60 minutes)

Before the activity takes place, it is suggested to allocate 30 minutes for a keynote with one or two practitioners that can share their experience on CBT development. They should emphasize the challenges they encountered, the actors they connected with, and how, why and what was the outcome. It is important that they show the partnerships that formed and the learning they have from connecting with different stakeholders.

If delivering the training to a single community, this activity should be done for every product/service they want to develop or are offering.

Objectives
• Understand the different needs and demands of the stakeholders that are more directly connected to the success of CBT initiatives
• Start visualizing potential products and services that can meet the demand of these stakeholders

Time allocation
• 2 minutes to explain the activity
• 3 minutes to create 8 groups (depending on the number of participants)
• 40 minutes to fill in the chart
• 15 minutes to share the contents of the chart

Materials
• Stakeholder impact analysis chart – size A3
• Markers/pens
• Flipchart

Room requirements
Enough tables for every team to be able work separately

People requirements
• 1 person to moderate the session
• 2 facilitators to support the teams in their discussions
• 1 person taking notes
**MODULE 3 – IDEA GENERATION**

**Process description**
- Moderator explains the activity; each group will have an A3 printout of the stakeholder impact analysis chart

**Reporting methodology**
- One group shares the content of their chart, other groups can add to the content if something is not mentioned
- The note-taker can make a list with all the input on the flipchart in order to have a stakeholder map that participants can refer to during the second part of the training

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>What are their principal interests?</th>
<th>Why are they important for your CBT business?</th>
<th>How can you engage with them?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>National visitor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>International visitor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>directly engaged in the business</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Families of community members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tour Operators</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associations and unions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service providers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(internet, health, office supplies, infrastructure)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marketers and sales representatives</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Governments/ regulators</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**FORMATTED TEMPLATE IS AVAILABLE IN ANNEX C.**
## Module 3 – Idea Generation

### Where Are We Now?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>75</td>
<td>Brainstorm on the potential products/services that communities can offer to different stakeholders</td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td>240</td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
Providing a new product or service is called a “venture” because of its risky character. When undertaking a new venture, it is critical to keep a close eye on the market and to monitor the reactions of customers and competitors. It is also important to remain true to your own vision and your community’s vision, to be flexible, tolerant of failure and to seek out opportunities wherever possible. Your idea requires that you be innovative, proactive, responsive to the needs of your customers, close to the market and above all prepared to take risks. To support you in acquiring the necessary skills to translate your idea into a business, this section provides you with some basic steps to brainstorm solutions for bringing together the expectations of your stakeholders that you can later on translate into a product or service.

- The steps below will guide you through the process of evaluating the viability of your ideas. Note that a successful business opportunity must be attractive, timely, durable, and provide a product or service that creates value for your customers. Therefore, consider whether:
  - There will be an ongoing need for your product/service in the market
  - Your product or service idea can be produced from a technical standpoint
  - You have access to the necessary financial resources and means to comply with local regulations to start up your initiative

**Some basic definitions**

**What is the Value Proposition?**

In module 1 the participants identified challenges/needs to be met by the product or services they would like to develop. This is to create value for the group of people they chose to serve and it is important for them to verify if their ideas are realistic before moving on with the generation of a plan. In order to identify this value, your participants should be aware of the “P.A.S.”. That is, they should undergo a process determined by: Preparation - Analysis – Structure.

**Preparation**

Participants must keep in mind that the value created by their product/service will determine their success. Why? Because a product/service that creates the best value to a certain group of people will not survive if it causes harm to other groups.

Since sustainable products and services offer solutions in terms of innovations there are a lot of collateral issues to consider in terms of socio-environmental impacts.

The overall objective is not to (ab)use an existing socio-environmental effect as a business idea with which to seek profit, but rather to use a business idea to provide a sustainable solution! It is also much easier to find investors for a business idea that creates value without causing harm at the same time.

- A suggestion for encouraging participants at this stage is to ask them for an example, such as the production and large-scale application of synthetic/chemical pesticides that might mitigate the impact of reduced crop yields. At first, this might resemble a sustainable business idea. However, the use of synthetic chemical pesticides in agriculture has extremely detrimental long-term impacts on the environment and can therefore not be considered a long-term sustainable solution.
MODULE 3 – IDEA GENERATION

Analysis
To conduct a value creation check, your training participants should take the most common target groups (stakeholders) into consideration to determine how they will be affected. How would they know if their product/service will generate value for their target market?

Below are some questions that will help them determine the value upon which they can capitalize.

- **Nature:** Can your product/service have a positive impact on the environment or can it mitigate negative environmental impacts in the long-term?

- **Customer:** Does your product/service fulfill customer needs and is it more attractive than those offered by your competitors?

- **Community:** Does your product/service offer social benefits? Examples of social benefits could be improved access to infrastructure, reducing waste, eliminating health-damaging pollution, creation of employment opportunities, etc.

- **Suppliers:** Do your business strategies help your supplier build their business?

Structure
It is important that participants take into consideration that the greater the numbers of stakeholders that perceive value from their product/service, the stronger their network will be. And, having a stronger network makes it easier to win interest of other stakeholders (like investors or more tourists, tour operators and governmental agencies).

The P.A.S process can be enabled through creative brainstorming sessions.

How to have a productive brainstorming session?
Brainstorming is a technique for problem solving that encourages people to think about every possible idea to address a challenge at hand. Some of the initial ideas may be considered “crazy”; however, they can help to spark more ideas or be crafted into a creative solution. It is important to avoid criticizing or rewarding ideas while brainstorming, as the purpose is to open possibilities and judgement means limiting these possibilities. The ideas generated during the brainstorming process are evaluated towards the end, giving the possibility to explore their feasibility and consider existing and potential limitations. Take notes, doodle, make sure you can present your ideas during the session.

A way to encourage brainstorming for future CBT products and services is to ask the following questions:

- **Why are road-safaris the current choice for tourists?** This question leads us to consider other tourism activities, such as home-stay visits, working in farms, breeding ostriches...

- **Who might be potential partners to help provide alternative tourism experiences in rural areas?** This may include tour operators with other products in the portfolio, elderly people with traditional knowledge, a person that has travelled abroad and has experience with alternative solutions, small companies operating other transportation means...

- **What elements are necessary to provide alternative tourism experiences?** Communities separated from safari trails, infrastructure available, safety, costs of maintenance...

- **How might you raise awareness about your product?** Normal commercial/retail channels, mobile points of sale, in combination with other services (e.g. air balloon operators)...

- **Where is your service going to be available?** In areas close to secluded communities, areas close to national parks that can be accessed by foot...

- **When are road-safaris required and for what purpose?** When visiting large areas with wild animals, to cover the most distance and see everything without disturbing the animals or being at risk.

Once you have gone over all possible questions look over the ideas you have generated to identify potential connections between the various concepts. You may realize that you developed fresh and new alternative solutions that offer better opportunities than your initial idea.
ACTIVITY – UNDERSTANDING MY STAKEHOLDERS’ EXPECTATIONS
(TOTAL TIME: 30 minutes – Modality A, 40 minutes – Modality B)

Objectives
• Understand the different needs and demands of the stakeholders that are more directly connected to the success of CBT initiatives
• Start visualizing potential products and services that can meet the demand of these stakeholders

Process description
• Moderator explains the activity, each facilitator will have already the ID cards to be analyzed per team
• When teams are formed, they’re given the cards and they have 10 minutes to go through them
• After reading the cards, the teams are given the stakeholder analysis chart and they have to fill it in using the information they learned from the cards. Participants should not try to fill the entire persona chart, only the section that is relevant to the ID card they received
• For Modality A, participants will have 20 minutes to fill in their cards; for Modality B, participants have 35
• It is important that the participants focus on the ID card they have and answer the following questions: is it an internal (national/local) stakeholder or an external (tourist and representation abroad)? What do they expect/provide? Try to be as specific as possible (i.e. the elderly tourist expects barrier-free access in the accommodation, the vegetarian expects no-meat menus, etc.). Internal stakeholders can offer clean accommodation, etc.

Reporting methodology
• At this stage there is no need for participants to report back to the plenary. They need the stakeholder chart for the second part of the session.

Time allocation
• 2 minutes to explain the activity
• 3 minutes to create 8 groups (depending on the number of participants)

Materials
• Persona ID cards (one ID per participant)
• Persona analysis chart (one per participant)

Room requirements
Enough tables for every team to be able work separately

People requirements
• 1 person to moderate the session
• 5 facilitators to support the teams in their discussions
PERSONA ID CARDS – TOURISTS

PERSONAS AND TEMPLATE SHOWN HERE ARE PLACEHOLDERS.
PERSONA ID CARDS for print are available in Annex C

PEDRO ALMEIDA

Nationality: Brazilian / Age: 26 / Gender: Male
Family status: Single, shares apartment with two friends in São Paulo
Occupation: Junior consultant in a multinational company
Travel needs: Discovery. As he spends too much time behind a desk, during his spare time, he seeks adventure in nature and interesting destinations to spend some time exploring different ways of living that he can later on discuss with his friends.
Average length of holidays: 3 weeks +

Consumer attitude: Aspirational
He normally does not mind the price as long as he knows that the places visited and products consumed, besides being popular (cool) are also safe and healthy. Moreover, for him it is important that the people behind the products have fair wages and that the environment is not harmed either.
Biggest concerns as tourist: Lack of Internet connection. Need to use too much cash (prefers credit card or online payments). Lack of vegetarian options for meals, as he prefers to consume only organic products; if they are gluten-free, even better.
Traveling preparation: Prefers destinations that do not ask for visas or that offer simple visa processes (e-application, upon arrival).
Personal statement
“I like to see the highlights of the world, explore them and embrace their diversity, both in terms of nature and people. I enjoy genuine experiences that allow me to meet new people, live great experiences with few resources and do something good for the others. Of course I also like to enjoy nature and go to places not too many people have been before so I can share it on social media. It makes me feel like my credit card, a true citizen of the world with no limits, that knows what is to be out of the ordinary... in style, of course.”

UNQUING HONG

Nationality: Chinese / Age: 53 / Gender: Female
Family status: Divorced, likes traveling with her son
Occupation: Civil servant
Travel needs: Relax. As she has a very stressful job and lives in Shanghai, the most populated city in China, and further has to travel to Guangzhou and Beijing (also largest urban areas) often, she cherishes the time off to relax and indulge herself.
Average length of holidays: 7 days, particularly in October during the National Holiday season.

Consumer attitude: Indifferent
She is unlikely to make proactive choices for more sustainable goods just because they are sustainable. Her sense of responsibility to society and nature is not really high and she is not very likely to try new things unless following recommendations from trusted sources. She is more inclined to follow the advice from her peers and to trust the advice of tour operators than that provided by strangers.
Biggest concerns as tourist: Being alone in an unknown place and having to communicate with the locals, as she only speaks Chinese and very little English.
Traveling preparation: Packages to travel with Chinese-speaking groups that include guides, transportation and can be paid in advance in China.
Personal statement
“I like traveling with my son, but he is now 29 and it is time for him to get married and settle down. He can’t travel with me anymore. My cousin and two other friends normally get great packages through travel agencies. They like going to different places where new relaxation experiences are practiced, and also to nice places where doing some good shopping is possible. I work a lot so I really want to escape from the noise when I am on holidays and I am fine with going abroad if my friends are going too.”

Likelihood of trusting consumer reviews, and performance ratings as provided by other travelers through online sources (red ◼) and peers (blue ◼)
PERSONA ID CARDS – TOURISTS

MARTIN SCHMIDT

Nationality: German / Age: 68 / Gender: Male
Family status: Married. Father of two, grandfather of five.
Occupation: Retired
Travel needs: Be together. Stability – he needs friendly solutions for people with limited mobility
Average length of holidays: 2 weeks
Consumer attitude: Practical
Gets discouraged by high prices and low performance. He sees sustainability as a bonus after price and performance.

Biggest concerns as tourist: Access for disabled people. He uses a walking frame and for long distances sometimes prefers to use a wheelchair. His wife is 71 years old. Although she is more active than him, she also prefers something adequate for Martin’s walking capabilities.
Traveling preparation: After speaking with travel agents, he normally uses online “comparison” portals to check value for money. Normally one of his sons or grandchildren helps him read the reviews from other users. He likes packages that include offers for people with different abilities and comfortable mobility options.

Personal statement
“Despite my mobility limitations, I am still very active. My wife and I worked very hard and now we really want to enjoy life. To me, it is important to learn about different cultures and their ways of living and coexisting with nature. I love beautiful sights of nature as much as unique architecture and places that seem to be the crystallization of someone’s dreams. And of course, I want to do it in a way that is also friendly with my pocket. My pension doesn’t give me that much, so I need to make sure it is worth it.”

AMY CROMPTON

Nationality: US / Age: 41 / Gender: Female
Family status: Married, mother of two children aged 12 and 6
Occupation: Part time nurse and teacher in an elementary school
Travel needs: Be together. For the kids – she prefers options that offer activities in groups that allow the family to have fun, relax and enjoy the time together
Average length of holidays: 10 days – depending on the school calendar
Consumer attitude: Advocate
She likes researching the places they will visit as well as finding the most information about what is unique about the place in terms of the environment and societies living there. She has the potential to have a huge influence on others by taking action on the issues she cares about. She doesn’t like shopping and has problems trusting brands or multinational companies, as she looks for authenticity and real positive impact on societies and nature alike.

Biggest concerns as tourist: Family friendly activities. She likes a mix between activities for children and youth only, which allows her and her husband to have “solo” time, but also activities that bring the family together. She also likes when her children have the chance to make friends with children of other cultures.
Traveling preparation: She likes speaking with other parents about their holiday experiences and she also likes spending time researching online about the options that offer interesting adventures for her family. For her, it is important to speak with an agent or get answers to her questions in forums as ways of clarifying all her doubts before booking any option that she and her husband find interesting.

Personal statement
“My children and their well-being is my priority, and that means I’m very concerned about the future generations in general. I don’t mind paying more for what is socially and environmentally responsible, as I believe it highlights the added value that truly responsible solutions represent. For my leisure activities, this responsibility also implies safety and stability. I want our family to have fun in a safe environment where we can be active and create memorable experiences together.”
PERSONA ID CARDS – STAKEHOLDERS

MWENI KIOKO

Age: 61
Gender: Female
Family status: Married, takes care of her grandchildren
Occupation: Craft workshop owner/hostess
Education: 8th grade elementary school

Motivation to participate in CBT: Improve livelihood

Personal statement
"We all work very hard to make our guests feel welcome and interested in learning more about our culture and ways of living. Kenya is famous for its hospitality and when I open the doors of my workshop, I’m opening the doors of my house as well. It is important that not only the community representatives, but also tour operators and other tourism agencies respect our work and treat us as serious business partners. I am thankful for the national and international unions and organizations interested in our activities, as they encourage us to perform better and make us realize we are not alone in this journey. That is why I also expect them to equip us with the necessary skills so that we can improve and become better, and make our products more attractive."

DR. CYPRIAN OTIENO AWITI

Age: 40
Gender: Male
Family status: Married, father of two
Occupation: Project manager at the Ministry of Environment, Natural Resources and Regional Development Authorities
Education: PhD and Master degree from a university in the UK

Motivation to participate in CBT: Promote economic development while protecting eco-diversity, protecting our land reserves and dealing with landowners

Biggest concern about CBT: That the products and services offered by the community can have high-quality standards to meet the demands of the consumers without compromising the integrity of the environment and the work of other communities or traditional tourism.

Personal statement
"CBT has the potential to increase our competitiveness as a tourism destination. That is why we need to guarantee that everything is in place to make it flourish; from having the right offers from the communities, to making them easily accessible by road or through other means, so that visitors are able to enjoy the nature even as they drive by. Infrastructure is indeed one of our priorities, as we are advocating for green, sustainable solutions to fulfill our vision of clean, healthy and safe environment."
PERSONA ID CARDS – STAKEHOLDERS

CAROLYNE MULEKA
Age: 28
Gender: Female
Family status: Single
Occupation: Promoter of community based tourism – Marketing consultant
Education: Master in Marketing and Public Relations

Motivation to participate in CBT: Having worked with the civil society sector, she wants to support empowerment of local leaders and show how communities can offer high value products and services, but at a reasonable price.

Biggest concern about CBT: Lack of interest or knowledge among the community members. They need to be able to keep up with the changing demands of tourism, be very familiar with what attracts tourists to their local areas, and have the skills to clearly communicate this information.

Personal statement
“Tam a local tourist. I like visiting and seeing the beauty of the countryside and that is why it is important to me that both local and international tourists are capable of finding what they are looking for. Some may think I'm overambitious when I say that it is important to have at least three people in a given community who are capable of maintaining communication about their activities through social media. The opportunity is there. If we want to succeed, we need to be able to keep up with the demands of the world and present ourselves as a modern nation proud of its traditions and as well as its heritage.”

PETER KARIUKI
Age: 52
Gender: Male
Family status: Separated.
Fully supports the mother of his kids and their three children
Occupation: True Tours Kenya founder and director
Education: Diploma on Tourism Management, Bachelor of Education

Motivation to participate in CBT: Diversify the agency’s portfolio and strengthen the tourism sector
Biggest concern about CBT: Unclear local governance structures that may lead to potential time wastage talking to the wrong people or even economic loss if what is delivered is not what was promised.

Personal Statement
“I grew up in close contact with nature and my rural community, since I used to travel quite often from the city to the village to visit my grandparents. My main motivation in studying hard even at the university level was to be able to improve the living conditions in my village and those of my family. While at university, studying bachelor of education, I had the opportunity to work as an Assistant Travel Consultant. This awakened my interest in the industry and motivated me to pursue a diploma course in tourism management. After the course I created True Tours with the essence of providing visitors with unique, true experiences. I really value the life in the villages and believe they can provide an unforgettable and positive experience to those who visit them.”
### PERSONA ID CARD ANALYSIS TEMPLATE

<table>
<thead>
<tr>
<th>Who am I?</th>
<th>What do I expect from?</th>
<th>What am I able to offer?</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Accommodation provider icon] Accommodation providers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>![Food &amp; Beverage Operations] Food &amp; Beverage Operations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>![Retail/Out of Pocket Spending Offers/Opportunities] Retail/Out of Pocket Spending Offers/Opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>![Services] Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>![Tour operators] Tour operators</td>
<td></td>
<td></td>
</tr>
<tr>
<td>![Communities] Communities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>![Associations and unions] Associations and unions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>![National Tourism Boards/Authorities] National Tourism Boards/Authorities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>![Marketing and PR Consultants] Marketing and PR Consultants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>![Visitors] Visitors</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
At the beginning of this module you learned about what ideas are and the various ways you can generate them. After having identified your key stakeholders and their main demands and needs, you now have the possibility of linking your ideas with their identified needs, thus having a clearer notion of what products and services you would like to develop and offer.

**Some basic definitions**

**How to transform your ideas into potential products and services?**

Depending on the current situation, you might want to either develop new products or services or improve upon those that already exist. Therefore, while developing ideas and searching for opportunities you should consider:

Inventing something new or improving an existing product/service?
- Search for opportunities to do things better. What can be improved? How can it be improved?
- Observe trends and tendencies and try to anticipate future changes/needs.
- Explore existing challenges. What seems to not be working correctly?
- Analyze gaps in the market. Are there needs that are not yet met?

What is the desired impact of your product/service?
Your observations and analysis should guide you towards new ideas. You can develop a CBT product or a service that either:
- Helps people produce and consume more sustainably,
- Helps people cope with the impacts generated by unsustainable patterns of consumption and production,
- Helps people live in circumstances where negative sustainability impacts are irreversible.

✓ The aim of the SUS-TOUR is to help you go beyond generating business ideas by encouraging you to search for ideas on how you can apply your experience and creativity to enable sustainable solutions for the benefit of your community and yourself. Below are some guiding points on how to apply these considerations:

1. A product/service that enables behaviors for Sustainable Consumption and Production: Think of a product/service that will fulfil the function of an existing product with greater efficiency or without harmful effects. You can either invent a new product/service (meet a need for a product/service), or make an existing product/service more efficient (improve and existing product/service) by developing better materials and/or quality. Taking the action of people disposing or littering plastic on streets, it might be possible to develop reusable bags made of cotton (product) or you could strive to engage local communities/stakeholders to raise awareness of waste issues (service).

2. A product/service that helps to cope with socio-environmental impacts: Think of a product or service that to some extent mitigates, reduces or reverses an impact you have identified. You might collect and recycle waste such that it can be reused (product), or you might develop a waste collection service for the city council to recycle and sell plastic material (service).

3. A product/service that helps people live alongside socio-environmental burdens: If there is no way that the effect and its impacts can be reduced, it is also possible to develop a product or service that helps people live within the new circumstances. Although the negative impacts may remain, your product or service helps to mitigate the effects on people. An example might be indoor entertainment products or services that encourage tourists to remain indoors and avoid being confronted with waste problems. Alternatively, excursions for tourists to attractive areas or interesting places might be an alternative service option if the waste problem cannot be addressed.
MODULE 3 – IDEA GENERATION

ACTIVITY – BRAINSTORMING MY PRODUCTS AND SERVICES
(TOTAL TIME: 50 minutes- same time is needed for both modalities)

Objectives
• Identify products and services that can satisfy the demands of all the stakeholders involved in CBT activities

Time allocation
• 5 minutes to explain the activity
• 5 minutes to create 6 to 8 groups (each group should have a different stakeholder)
• 40 minutes to discuss the potential products/services that can be developed

Materials
• Persona ID cards and analysis sheets (one ID per participant, they are bringing their own from previous session)
• Table ID (one per table)
• Flipcharts
• Markers

Room requirements
Enough tables for every team to be able work separately

People requirements
• 1 person to moderate the session
• 3 facilitators to support the teams in their discussions

Process description
• The groups should be reminded that they have to think about products and services that meet the needs and demands of all (or most of) the stakeholders in regards to the attractions influencing a destination
• The groups are invited to answer the Why? Who? What? Where? When? questions about the topic they have on the table. They have to answer from the perspective of the stakeholder they are representing (ID Card) considering what they wrote as their needs/offers in the ID Analysis

Reporting methodology
• At this stage, there is no need for participants to report back to the plenary. They need the flipcharts for the third part of the session

TABLE ID CARDS – Available in Annex C.
### WHERE ARE WE NOW?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>50</td>
<td>Product/service feasibility check based on analysis of SWOT and brainstormed ideas</td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td>240</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
Providing a new product or service is called a “venture” because of its risky character. When undertaking a new venture, it is critical to keep a close eye on the market and to monitor the reactions of customers and competitors. It is also important to remain true to your vision and your community’s vision, to be flexible, tolerant of failure and to seek out opportunities wherever possible. Your idea requires that you be innovative, proactive, responsive to the needs of your customers, close to the market, and above all, prepared to take risks.

To support you in acquiring the necessary skills to translate your idea into a business, this section provides you with some basic steps to brainstorm solutions for bringing together the expectations of your stakeholders, and later translate them into a product or service.

The steps below will guide you through the process of evaluating the viability of your ideas. Note that a successful business opportunity must be attractive, timely, durable, and provide a product or service that creates value for your customers. Therefore, consider whether:

- There will be an ongoing need for your product/service in the market
- Your product or service idea can be produced from a technical standpoint
- You have access to the necessary financial resources and means to comply with local regulations to start up your initiative

When thinking about CBT products/services, ask yourself:

- What are the specific cultural elements? What is the relationship between nature and specific human activities, such as food production/consumption (i.e. would your guests be able to create their own recipes,) or products related to these relationships?
- Think about the specific lifestyle aspects. Are there any daily-life activities that your visitors would find unique to experience (i.e. harvesting their own honey)?
- What is related to actions like eating together or celebrating? What are the stories behind (i.e. stories of how to dispose of the bones or parts of the animal that are prepared/eaten in a specific way)?

Some basic definitions

How to have a productive brainstorming session?

Brainstorming is a technique for problem solving that encourages people to think about every possible idea to address the challenge at hand. Some of the initial ideas may be considered “crazy”; however, they can help to spark more ideas or be crafted into creative solutions.

Once your brainstorming session is over, you have then the possibility to analyze these ideas and prioritize them in order to identify the one that you can realistically turn into a project with business potential.
ACTIVITY –  
EXPECTATION CROSS CHECK
(TOTAL TIME: 50 minutes – Modality A/ 
60 minutes – Modality B)

Objectives
• Identify products and services that can satisfy the 
demands of all the stakeholders involved in CBT 
activities
• Prioritize ideas based on their feasibility

Time allocation
• 5 minutes to explain the activity
• 5 minutes to create 6 to 8 groups, 1 per topic 
(each group should have a different stakeholder 
represented)

Materials
• Persona ID cards and analysis sheets (one ID per 
participant, they are bringing their own from 
previous session)
• Table ID (one per table)
• Presentation with instructions for the activity 
• Flipcharts
• Markers

Room requirements
Enough tables for every team to be able work 
separately

People requirements
• 1 person to moderate the session
• 5 facilitators to support the teams in their discussions

Process description
• The groups should be reminded they have to think 
on products and services that meet the needs and 
demands of the stakeholders in the group, 
represented in the ID cards
• The groups are invited to answer the Why? Who? 
What? Where? When? questions about the topic 
they have on the table. They have to answer from 
the perspective of the stakeholder they are 
representing (ID Card), considering what they wrote 
as their needs/offers in the ID Analysis
• After 20 min (A) or 30 min (B) discussion as different 
stakeholders, the participants should “return to 
being themselves” and analyze the products/services 
that meet most of the needs and demands 
from stakeholders
• Participants will have 20 (Modality A) or 30 
(Modality B) minutes to choose one product/service 
they would like to develop as part of a CBT 
portfolio. Suggestion for selection process:
  o Make a list of all products/services brainstormed 
  o Every group member can vote for one product/service – the one that receives the majority of votes 
    is the one to be analyzed in the next activity
  o In case there is no clear winner, participants can 
    vote again but only for one of the pre-selected 
    products/services, except the one they voted for in 
    the first round

Key to facilitator:
In order to help the participants for their 
brainstorming, ask them to answer the following 
questions:
• What do you have to offer?
• How can the visitors have access to your product/service?
• Is it worth developing infrastructure for it? Why?
• Is it something you can do on your own or you need 
to work with other communities? What would be 
their roles?

Reporting methodology
• At this stage there is no need for participants to 
report back to the plenary. They need the flipcharts 
for the next session
By now, the participants have gone through a visionary process into a hands-on stage, where they are now ready to crystalize their ideas into a business plan for a particular product or service. The analysis of stakeholders and overall brainstorming sessions set the context for prioritizing the ideas that are more likely to succeed when taking into consideration the local contexts and realities that the participating stakeholders face.

This module focuses on the considerations needed to draft a feasible business plan and get the participants of your training ready to pitch their ideas at the Collaborative Innovation Workshop. There are many external sources of potential support that you can access to help enhance your plan. This module provides insights, strategies and tools to help identify what is needed for a community enterprise to be successful in business and sustainability terms, particularly to identify where it is needed to build the necessary experience to help you start out. In here, you will find a “check list” to help identify external factors that can strengthen your idea and help you turn it into a reality. From economic and legal considerations, to useful tips for writing a business plan, this module will help you:

• Gain confidence to prepare a sound plan and secure necessary support to turn it into viable business
• Strengthen your planning skills to develop a sustainable business plan
• Get to know basic communication rules and tools for successfully promoting your business to others
• Identify diverse funding opportunities
## WHERE ARE WE NOW?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Module 1. Kenya Context</strong></td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Module 2. CBT Success Factors</strong></td>
<td>Identification Assimilation</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td><strong>Module 3. Idea generation</strong></td>
<td>Stakeholder mapping</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Module 4. CBT Business Plan</strong></td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td>Prepare business plans that can be turned into potential CBT products / services</td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Module 5. Training skills</strong></td>
<td>Self-assessment</td>
<td>140</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Feedback and next steps</strong></td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td><strong>Closing ceremony</strong></td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
MODULE 4 – CBT BUSINESS PLAN

Identifying and understanding
- Megatrends influencing tourism
  Global demands from tourists
- Local needs and demands (strengths, opportunities, weaknesses and threats)

Communicating and implementing
- Training for education, capacity building and skills development
- Output and short term outcomes review
- Consolidation of partnerships
- Development of marketing strategy

Inclusive and sustainable CBT business / product/services
- Stakeholder satisfaction
- Local governance and accountability

Analyzing and aligning
- Existing practices of products and services
- Success factors’ review
- Inventory of resources and activity development
- Creation of partnerships

Co-creating and testing
- Awareness raising
- Local leadership development

Figuere 4.1

Note: The colored areas are the elements of the framework addressed in this module
As the participants come closer to creating a plan for a specific product or service, invite them to imagine that they are planning a dinner party. As hosts, they would like to have a generous meal, desserts, decoration, music... How would they ensure they have all they need? Naturally, they would make a list and use it as reference for all the things needed for organizing a successful party.

Drafting a business plan is very much like making a shopping list. We start by envisioning what we want to do and for whom we want to do it, and then we select what we want to get to be able to produce what we planned. During the preparation, we check our pantries and fridges and go over what we have on hand, including going through our decoration boxes and music collection. What we are lacking gets written down on a shopping list. You wouldn’t go to a grocery store if you are looking for lanterns and candles, nor would you go to a toy store if you needed milk and eggs. What if you’re new in town and you don’t know where the bakeries are? This will take you more time, as you need to find where to get your supplies from, so you need to plan that too.

What do dinner plans and starting a business have in common? Both have “P.A.S.” at each stage of development! Remember from Module 3? P.A.S stands for: Preparation – Analysis – Structure

Honing the skills of your workshop’s participants in performing each of these aspects of planning will help them to strengthen and focus their plan.

Some basic definitions

ABCDE for a successful business

Recalling what was introduced in the first module will give the participants a good head start, specifically because it shows how a sustainable business balances economic, social and environmental aspects and all goals should be drafted under these considerations.

The outline for the general business strategy should also have clear targets for generating value, particularly to the members of the communities and their visitors.

A business model describes how a company creates, sells and delivers value to its customers, society, and commercial partners, and how its products and services relate to the environment. The model answers the following questions:

• Who will purchase the product or service? ➔ Customer Targeting
• How does the product or service create value? ➔ Value Proposition
• Does the business plan consider alternatives through interaction with actors at different stages? How is the product or service created and delivered to the market and environment? ➔ Innovation in the Value Chain
Although the profit arising from the business may be taken as a crucial perk for the community, this is just the economic outcome that arises by providing the product/service to the market. Alone, the profit-seeking motive is unsustainable. In order to reach the economic goal, the participants must consider other reasons to start a sustainable CBT. Beyond earning money and developing their skills, social considerations such as creating employment in the community and/or improving local environmental conditions are also important drivers for a sustainable business. It can be as simple as A, B, C, D, E.

**Attain Innovation:** There is no need to create something new. Improving existing products, services or processes helps to identify new niche markets for products with positive environmental and social attributes. This will be welcomed by customers and potentially earn superior brand recognition.

**Build Reputation and Trust:** Although reputation is gained only following solid social and environmental performance, pioneering accountability mechanisms and reputation for product and service value are crucial factors for your success.

**Convey fewer costs:** Activities such as implementing resource efficiency programs (producing more value with fewer resources) will overcome many challenges than can stand in the way of your social and environmental goals. Motivating the community members to be part of resource efficiency activities is another opportunity to reduce your costs.

**Diminish Risk:** Though risk will always exist, it can be managed in various ways to minimize potential negative impacts. One way to identify risk is to map out concerns and interests of your community members, customers, service providers, tour operators, public authorities and peers. This will help you identify issues that affect your performance to develop risk mitigation strategies.

**Enable Access to Capital:** Traditional financial institutions have been developing new mechanisms to increase their business whilst investors are continuously seeking opportunities to reach new markets. Because of a strong future potential for value, sustainable CBTs normally start with some grants or external support for a limited period of time. Keep in mind that for these organizations, partnering with you provides them with the means to improve their standing among their own stakeholders.
## Module 4 – CBT Business Plan

**Where are we now?**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td>Icebreaker, Training overview, Vision 2030</td>
<td>60</td>
<td>60</td>
</tr>
<tr>
<td><strong>Module 1. Kenya Context</strong></td>
<td>Kenya Today, CBT opportunities, SWOT</td>
<td>60</td>
<td>90</td>
</tr>
<tr>
<td><strong>Module 2. CBT Success Factors</strong></td>
<td>Identification, Assimilation</td>
<td>90</td>
<td>120</td>
</tr>
<tr>
<td><strong>Module 3. Idea generation</strong></td>
<td>Stakeholder mapping, From expectations to products, Consolidation of ideas</td>
<td>50</td>
<td>60</td>
</tr>
<tr>
<td><strong>Module 4. CBT Business Plan</strong></td>
<td>Introduction of the Business Canvas, Drafting the plan, Preparation for CIW</td>
<td>60</td>
<td>120</td>
</tr>
<tr>
<td><strong>Module 5. Training skills</strong></td>
<td>Self-assessment, Training flow, Skills building, Dry runs</td>
<td>140</td>
<td>140</td>
</tr>
<tr>
<td><strong>Feedback and next steps</strong></td>
<td></td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td><strong>Closing ceremony</strong></td>
<td></td>
<td>30</td>
<td>30</td>
</tr>
</tbody>
</table>
Some useful information

The Business Model Canvas

In 2009, Alexander Osterwalder and Yves Pigneur published on their website the “Business Model Generation,” an open-sourced, co-created book (by co-created they mean over 400 practitioners from 45 countries) introducing the “Business Model Canvas” that departed from the definition of what a business model is. They stated: “A business model describes the rationale of how an organization creates, delivers and captures value”. The Canvas is a tool for strategic planning and management, as it allows the users to design, describe, challenge and review the main blocks of the four areas of a business: customers, financial viability, infrastructure and offer. Moreover, the tool enables the development of strategies to be implemented through systems, processes and organizational structures.

The Sustainable Business Model Canvas (SBMC)

In 2012, the CSCP\(^2\) elaborated further on the sustainability dimensions that any entrepreneur aiming at developing a sustainable enterprise should consider and included it as an element of the Osterwalder/Pigneur canvas. Following the principles of SWITCH Africa Green and the Sustainable Business Framework developed for the SUS-TOUR participants, the SBMC is the business model canvas used for this training.

- The SBMC elements are clearly identified in the diagrams presented below and all its components will also be shown on screen via presentation.
- Displaying the flipcharts and material produced during the first part of the training will be very helpful for the participants, as they can easily access the information to fill in the canvas. In this activity, participants should either focus on one selected business idea for a product/service generated during preceding days of the training program, or invent a service around one specific product that is already manufactured and analyze the improved idea based on the value proposition and innovation across the supply chain.

---

2) The project was developed by Jadwiga Zurad as manager, Georgina Guillen-Hanson as advisor and Dr. Nadine Pratt as reviewer.
ACTIVITY – INTRODUCTION TO THE BUSINESS CANVAS AND DRAFTING THE PLAN
(TOTAL TIME: 60 minutes – Modality A / 120 minutes – Modality B)

Objectives
• Encourage participants to develop business models that minimize negative social and environmental impacts while being profitable
• Enable participants to address customer needs and consider the role of other stakeholders
• Improve understanding of various segments of a new business model and the stages needed prior to drafting a business plan for a sustainable CBT product or service
• Implement considerations required for business plan modelling

Process description
• Moderator explains the activity, each group will have an A3 printout of the stakeholder impact analysis chart
• The groups are the same ones that were created for the activities of the previous modules as they will be using the material of the cross check
• During the discussions, the facilitators will be visiting the different groups, challenging their ideas and notions by questioning them about the components of the business canvas

IF THE PARTICIPANTS ALREADY HAVE A SPECIFIC PROJECT IDEA…

It is recommended to follow Modality B for this activity, and if possible, allocate even more time to work on the Sustainable Business Canvas.

If various participants of the training already have a specific project idea, it is important that the session begins with a 3-minute pitch from every participant with an idea. At the end of the pitches, the rest of the participants are invited to join the group of the idea they liked the most. It is important that there are at least 2 people per project (besides the entrepreneur presenting it) so there will be groups of 3 or more participants.

The rest of the session is about developing the SBC for the specific product/service presented.

If one or various participants already have a business plan, after the group is formed they have to fill the canvas using their business plan as reference. This activity will help them to identify areas of their plan that may need further refinement and also help them to consider all the sustainability aspects of their idea.

Reporting methodology
• Participants have to prepare for a 3-minute pitch to present their overall idea and considerations discussed so far (if time allows)
• The rest of the group should provide feedback to the ideas presented
### Module 4 - CBT Business Plan

#### Sustainable Business Model Canvas

<table>
<thead>
<tr>
<th>Key Partners</th>
<th>Key Activities</th>
<th>Unique Value Proposition</th>
<th>Customer Relationships</th>
<th>Customer segments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Resources</th>
<th>Channels</th>
<th>Costs to be paid</th>
<th>Sustainability Considerations</th>
<th>Created Profit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>(by the company, environment, society)</td>
<td>(for the company, environment, society)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Monetary (direct costs)</th>
<th>Non-monetary (risks)</th>
<th>Impact aspects</th>
<th>Monetary (revenues)</th>
<th>Non-monetary (other benefits)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic (Monetary Value for the company)</td>
<td>Environmental (Impact on the Environment)</td>
<td>Social (Impact on the Society)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

SUSTAINABLE BUSINESS MODEL CANVAS – Adaptation from Osterwalder\(^3\) canvas. IMAGE SHOWN IS A PLACE HOLDER. THE CANVAS FORMATTED FOR PRINT IS AVAILABLE IN THE ANNEXES SECTION.

### Module 4 – CBT Business Plan

**Canvas Key – Explanation Available on Presentation, No Need to Print**

**Model Business Canvas Part I - Business Development Orientation**

<table>
<thead>
<tr>
<th>Key Partners</th>
<th>Key Activities</th>
<th>Unique Value Proposition</th>
<th>Customer Relationships</th>
<th>Customer Segments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who are our key stakeholders?</td>
<td>What key activities do our Value Propositions require?</td>
<td>What value do we deliver to the customer?</td>
<td>What type of relationship does each of our visitors expect us to establish and maintain with them?</td>
<td>For whom are we creating value?</td>
</tr>
<tr>
<td>Who are our key suppliers?</td>
<td>Our Distribution Channels?</td>
<td>Which one of our customers’ problems are we helping to solve?</td>
<td>Which customer needs are we satisfying?</td>
<td>Who are our most important customers?</td>
</tr>
<tr>
<td></td>
<td>Customer Relationships?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Our Revenue streams?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Resources</th>
<th>Channels</th>
</tr>
</thead>
<tbody>
<tr>
<td>What key resources do our Value Propositions require?</td>
<td>Through which Channels do our Customer Segments want to be reached?</td>
</tr>
<tr>
<td>Our Distribution Channels?</td>
<td></td>
</tr>
<tr>
<td>Customer Relationships?</td>
<td></td>
</tr>
<tr>
<td>Revenue Streams?</td>
<td></td>
</tr>
</tbody>
</table>

**Unique Value Proposition**

- What value do we deliver to the customer?
- Which one of our customers’ problems are we helping to solve?
- Which customer needs are we satisfying?

**Customer Relationships**

- What type of relationship does each of our visitors expect us to establish and maintain with them?

**Customer Segments**

- For whom are we creating value?
- Who are our most important customers?
### MODULE 4 – CBT BUSINESS PLAN

**MODEL BUSINESS CANVAS PART II - Sustainability considerations**

<table>
<thead>
<tr>
<th>Costs to be paid (by the company, environment, society)</th>
<th>Sustainability Considerations</th>
<th>Created Profit (for the company, environment, society)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monetary (direct costs)</td>
<td>Non-monetary (risks)</td>
<td>Impact aspects</td>
</tr>
<tr>
<td>What are the most important costs inherent in our business model?</td>
<td>What are the externalised negative impacts on the environment that result from the different elements of our business model?</td>
<td>Economic (Monetary Value for the company)</td>
</tr>
<tr>
<td>What are the negative impacts on the environment that result from our activities/products/services and will imply further monetary costs?</td>
<td>What are the externalised negative impacts on the environment that result from the different elements of our business model?</td>
<td>Environmental (Impact on the Environment)</td>
</tr>
<tr>
<td>What are the externalised negative impacts on the society that result from the different elements of our business model and will need to be remunerated?</td>
<td>What are the externalised negative impacts on the society that result from the different elements of our business model?</td>
<td>Social (Impact on the Society)</td>
</tr>
</tbody>
</table>
## Module 4 – CBT Business Plan

### Where Are We Now?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Total Length (minutes)</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker, Training overview, Vision 2030</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Module 1, Kenya Context</td>
<td>Kenya Today, CBT opportunities, SWOT</td>
<td>60</td>
<td>90</td>
</tr>
<tr>
<td>Module 2, CBT Success Factors</td>
<td>Identification, Assimilation</td>
<td>90</td>
<td>120</td>
</tr>
<tr>
<td>Module 3, Idea generation</td>
<td>Stakeholder mapping, From expectations to products, Consolidation of ideas</td>
<td>50</td>
<td>60</td>
</tr>
<tr>
<td><strong>Module 4, CBT Business Plan</strong></td>
<td><strong>Introduction of the Business Canvas, Drafting the plan, Preparation for CIW</strong></td>
<td><strong>15</strong></td>
<td><strong>15</strong></td>
</tr>
<tr>
<td>Module 5, Training skills</td>
<td>Self-assessment, Training flow, Skills building, Dry runs</td>
<td>140</td>
<td>140</td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td>30</td>
</tr>
</tbody>
</table>

Participants will be made aware that they can continue working on their plans or create new ones with their communities and count with the support of the project partners.
This section applies for trainings delivered for the Train the Trainers and the Collaborative Innovation Workshop. The content is a reference guide to support the preparation of business plans for after the workshop and support CBTs in further honing their business skills. Please note that a second tool, the GO-TO-MARKET strategy will be provided as part of SUS-TOUR training and will address the issues related to the specifics of turning a Sustainable Business Plan into a marketable project and eventually launching it into the market.

### The Collaborative Innovation Workshop (CIW)

This event will take place after the Training of Trainers delivered by the project partners and will bring together CBTOs, tour operators, policy makers, potential investors, civil society organizations and academia to learn about the different products and services developed through the SUS-TOUR trainings.

SUS-TOUR support activities have been developed in a way that enable trainers and training participants to undergo a 3-stage process to develop their CBT products and services.

#### Step 1. Get trained in SUS-TOUR methodology and become a certified SUS-TOUR trainer.

#### Step 2. Organize and deliver trainings to different community members, helping them to create their own projects for CBT products and services. It is important for you to remember that, as a SUS-TOUR trainer, you can also create your own initiatives and that delivering a training can be a process to help you reviewing and perfecting your business idea.

During this stage, the SUS-TOUR project partners will provide free coaching to support SUS-TOUR Community entrepreneurs (you included) in the refinement of product/services ideas.

#### Step 3. Presentation of projects at the CIW. During the CIW, participants of trainings delivered by SUS-TOUR trainers (students, CBTOs and TOs) who already have project ideas or developed some during the training, will have the opportunity to PITCH THEIR IDEAS to an expert panel and gain more visibility that could lead to even further support from participating organizations (i.e. governmental representatives, microfinance organizations, multilateral donor organizations, private investors, etc.).

Besides receiving feedback from key stakeholders, participants of the CIW will have the opportunity to partake in an interactive agenda that conveys keynotes on global good practices and inspirational tools representing the future of tourism, among other relevant topics that will enhance further refinement of their CBT products/services.

- The CIW is one of the milestones for supporting in bringing SUS-TOUR CBT solutions to the market. To promote more coordinated marketing of CBT initiatives, another milestone of SUS-TOUR includes the establishment of a Go-CBT marketing subcommittee, composed of associations of TOs, CBTOs, as well as national and international ecotourism organizations. The organizations of the subcommittee will provide support to guide the marketing strategy development, prioritization and piloting, including developing and disseminating a CBT guidebook and testing simplified reservation system. SUS-TOUR will combine both online channels (e.g. project webpage and social media) and offline approaches (e.g. guided reach out to key associations) to pilot marketing strategies. The subcommittee will lead and promote scaling up of the marketing strategies beyond the project duration.

### IMPORTANT

Please remember that:

- Coaching will be provided in a non-physical style, therefore your queries and coaching time have to be carefully planned in advanced;
- The coaching support has to be requested directly to the partners (EK, FECTO and the CSCP);
- Coaching sessions per initiative will be limited – this way more groups can be supported;
- The coaching time will take place between the SUS-Tour training and the Collaborative Innovation Workshop (summer 2016)
Figure 4.2 illustrates the steps and key milestones in the creation of CBT products and services under the SUS-TOUR framework.
Some basic information

The project pitch (prepare for your CIW presentation!)

Pitching your business idea means presenting the concept to different stakeholders and asking them for the necessary resources to get your venture started. Most times you will be seeking financial resources. However, do not neglect to seek out in-kind resources such as office space and furniture, advertising spaces, stationary or the use of other services such as website hosting or sharing a phone line.

Whatever resources you are aiming for, you must be able to sell your idea properly as stakeholders, particularly investors, want to know what can they expect to receive for their contribution. The core question that the investor will ask is whether their investment will add enough value to the enterprise to recover their investment and earn an acceptable. They will carefully consider the risk of their investment being lost.

What interests an investor in a potential project opportunity? What can you do to increase the likelihood of success for your business? How solid does your business idea appear to an outsider? These are some of many questions that you must ask yourself before approaching potential supporters.

Necessary conditions for success

- **Proven management skills and a competent management team:** Investors do not usually fund ideas, but rather people. Investors are mostly interested in the quality of management than in brilliant concepts with incompetent people. The supporter wants to know:
  - Whether you understand the nature of the marketplace (e.g. do you know your customers, the distribution channels, etc.?)
  - Whether you demonstrate leadership (e.g. have you chosen the right people with the skills to complement your own?)
  - Whether you demonstrate a harmonious personality or not (e.g. are you charismatic and hard worker? Can you inspire co-workers?)
- **Scalable business model:** Can the business be replicated in other locations or with other customers? Is it sufficiently flexible to adapt to market changes or adapt to new conditions?
- **Compelling, quantifiable value proposition:** Your supporters will want to know whether your product is likely to be successful in the market. They want to hear concrete arguments. Unsubstantiated, undocumented assertions are unlikely to be received favorably.
- **Customers with real needs:** You should be able to articulate the needs of your customers and how you can satisfy those needs. You should be able to quantify and put a monetary value on the needs of your customers. It is not the task of the supporters to guess the value of your solution.
- **Customers with the money to pay:** Your potential supporters want to be sure that there is a market for the business that will receive their investment. There might be unsatisfied needs in the market and a desire to acquire your solution, but if your potential customers do not have or cannot afford what you offer, you are unlikely to receive investment support.
- **Not entering into a crowded market:** Supporters, particularly investors, are seeking niches and not saturated markets with intense competition. You need to assess the level of competition early as well project the likely level of competition when the company begins operations.
Here are some useful pitching tips that you can use for all purposes, from organizing your training as facilitator to presenting your proposed products/services to any potential supporter:

- **Show self-confidence**: This is only possible if you know every single detail of your business plan. It should not be difficult as you wrote it yourself!

- **Understand the needs of investors**: Entrepreneurs who understand investor needs and wants are more likely to close a deal than those who focus on their own needs and wants. No matter how interesting your idea might be, your pitch must always address “what’s in it for me?” – from the point of view of the potential investor.

- **Communicate clearly and go straight to the point**: Do not beat around the bush. Give special emphasis to the main topics, figures and numbers. Having a good, clear presentation, either on your computer or as printout will always help to better illustrate your case. If you are presenting a product, try bringing a sample along, even if it is just a prototype.

- **Express yourself correctly**: It is important to not only have a good verbal presentation but also good body language. Do not cross your arms, it can portray you as arrogant! Look into the other person’s eyes. Do not put down your head! Show the listener that you are an enthusiastic entrepreneur. Dress appropriately. Even when you think your investor is a jeans and t-shirt person, it is always good to show appreciation for their time by attending your meeting in appropriate business clothing.

- **Accept criticism**: People interested in new products and services are commonly very busy people who have deep commercial and business knowledge. They will try to question your document and test both your product knowledge and your management capabilities! They need to be confident that they are investing their money, resources and time on capable and reliable people. If they criticize your plan, do not be offended. Key answers to criticisms could be: “You might be right, I will take it into consideration” or “that point is very important to enhance my document, thank you!”

- **Be yourself when speaking**: To be an entrepreneur or to be involved in business situations is not only about being serious! Businessmen are not machines! Be charming and humorous when you approach a client, an investor or a potential partner, but at all times maintain a professional demeanor.

- **And last but not least**: You yourself have to be convinced of the potential for success of your business idea. If you are not convinced of the merits of your idea and your skills to carry the idea forward into a growing business, how do you expect to convince others of your potential for success?

To be successful you will have to assume many roles at the same time. You will be the owner, the general manager, the accountant, the salesperson, the operator, the secretary and even the receptionist. For that reason, prepare yourself for all the pressure you will encounter. More importantly see the future as a challenge to overcome and avoid frustration.
Basics of Tourism Marketing

Marketing is the key to the success or failure of your business. Marketing includes the activities, tools and processes that you use to communicate your offerings to customers, clients and partners. No matter how unique, accessible, safe or attractive your product is, you will not get visitors if you don’t effectively market your business. The key to successful marketing is knowledge. Knowledge is power in the tourism business. First, you should know your product and its unique selling propositions. Second, you should know your competition, what they do and what sets your business apart from them. And third, you should know your market and to whom your product will appeal. With this knowledge in place, you are in a strong position to embark on an effective marketing campaign. Marketing a CBT business is, in principle, the same as marketing any other business. It is all about getting the right information to the right people.

However, there are some aspects of marketing specific to CBT businesses. For any market plan, the biggest challenge is getting access to the people who will buy your services and product. In tourism, those people are generally scattered all over the globe. For CBT, this problem is accentuated, because of the relatively small percentage of people who are interested in the ecotourism market. When your potential target group is smaller, it is that much more difficult to gain access to it. Because your target market is relatively small and dispersed around the world, it is vitally important to get your message right in your marketing campaign.

Appearance matters, and your marketing campaign is your key tool for presenting your product and your desired image to the world. People will only buy a product if you are presenting it in a way that is appealing and relevant to them, which is why it is important to understand your target market.

Remember, however, that although your goal is to present your product in the best possible light, what you say and how you say it should be consistent with how you do things. You should be honest and accurate, promoting the highlights of your product while managing expectations. If people have the wrong conception about what you are offering, they will be dissatisfied and your business will fail.

Developing a marketing plan

A marketing plan describes how your product is going to be sold and to whom. There are four key elements that should be included in every marketing plan:

**Product:** Your product has to be designed in such a way that it is appealing. With a good product, you’ve already done much of the marketing.

**Positioning:** This describes the distribution channel that you are going to use to sell to your customers. If you are selling indirectly, via tour operators or travel agents, you need to think about marketing to the middleman, through business-to-business marketing. However, if you are planning to sell directly to your customers, you need to focus on websites, brochures and other means. In this case, effective marketing is all about getting access to your target group in the first place.

**Price:** While there are many fancy approaches and terms for pricing, including competitive pricing and cost pricing, it all basically comes down to what you think someone will be willing to pay for your product. That is what the customer is going to ask himself. Thus it is important to get the value for money equation right.

**Promotion:** Once you have crafted a message that sells your product, you have to deliver this message through the most effective channels to reach your customer. This involves figuring out how you are going to communicate your message to your target market, and also how you are going to encourage repeat visits from existing customers.
Marketing CBT products

As a CBT business, one of your key offerings is the sustainable nature of your business. The Internet offers a tremendous opportunity to market your sustainability efforts and other factors that make your product unique, such as social programs or relationships with local communities. Before websites, businesses had to make a cost-benefit decision about whether it was worth the extra money to print information on environmental or social responsibility, but now it is very easy to just add it to your website. While it is important to communicate sustainability in your marketing strategy, it is equally important to do so in a realistic and balanced way. Authenticity is the key to effective promotion of sustainability. Do not try to fake anything or use fancy buzzwords. Just try to authentically communicate what you truly believe. You have chosen to develop an ecotourism business because you are a believer in a sustainable approach, and the more naturally and authentically you can communicate this message, the more credible it is to the customer who is actually receiving the message.

Please go through this checklist that can help you to market your CBT product in an effective way:
1. Identity: Do you know who you are?
2. Sexiness: Are you really attractive enough?
3. Uniqueness: Do you have something no one else has?
4. Segments: What do your customers need?
5. Target Groups: What kind of customer do you want?
6. Touchpoints: Do you know how to touch your customers right?
7. Communication: Do you speak your customer’s language?
8. Consistency: Do you walk the talk?
9. Delivery: Are you ready for the moment of truth?
10. Loyalty: Do your customers like you?

Remember that SUS-TOUR program includes the consolidation of a marketing guideline. Therefore, the information presented in this workbook is meant to be an introduction to the subject.
SUS-TOUR trainings are meant to be an empowering experience, with the objective of supporting the development of sustainable CBT products and services, as well as enabling participants to recreate the training and invite other people to discover the opportunities that CBT offers to them.

The Train the Trainer model followed by SUS-TOUR aims at enabling experienced people to instruct other people with less experience in the delivery of the workshops. Moreover, the training flow has been designed according to the steps followed by the Business Innovation Framework, thus enabling the participants to understand every step of the process and equip them with tools to identify opportunities to be transformed into potential products and services.

You, the new SUS-TOUR trainer, have already participated in the workshop and after experiencing its content, and based on this experience, you are now able to use all the material of this workbook to organize and deliver your own SUS-TOUR training sessions. Please bear in mind that as a trainer or facilitator you have to be prepared to present the information in an effective, concise and clear way. You should be able to respond to the questions from the participants and facilitate the dialogue among them. That is, you have to be able to facilitate discussions and provide the resources and materials that support the work of the participants. In general, a facilitator is someone that “makes a process easy.” This means that the facilitator plans, guides and manages the group to ensure that the objectives are met, that people participate and that everyone involved had a say. It is important that you are objective and take a neutral stance, detaching your personal views from detailed content and focus solely on the group’s process, as your responsibility is to help the group reach a successful conclusion or solution.

This module is divided in two sections. The first one focuses on you as a trainer, emphasizing the skills and capabilities needed to facilitate and deliver a training (not only SUS-TOUR). The second section goes into the details of how to plan and deliver a SUS-TOUR training.

Please note that for this module, the delivery times do not change.

Why be a SUS-TOUR facilitator? As you could appreciate during the 1-day training, facilitators have the task of ensuring that participants of the training grasp the core ideas of sustainable CBT as quickly as possible. It is critical to provide the necessary support for participants to develop sustainable business concepts into concrete ideas and maximize the probability of success.
## MODULE 5 – TRAINING SKILLS – FACILITATING A SUS-TOUR SESSION

### WHERE ARE WE NOW?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Length</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>140</td>
<td>Prepare future SUS-TOUR trainers in the planning and delivery of trainings in their communities</td>
</tr>
<tr>
<td></td>
<td>Training flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
MODULE 5 – TRAINING SKILLS –
FACILITATING A SUS-TOUR SESSION

Identifying and understanding
- Megatrends influencing global tourism demands from tourists
- Local needs and demands (strengths, opportunities, weaknesses and threats)

Communicating and implementing
- Training for education, capacity building and skills development
- Output and short-term outcomes review
- Consolidation of partnerships
- Development of marketing strategy

Stakeholder satisfaction
- Managing profit
- Stakeholder satisfaction review
- Best practice development
- Networking and international exposure

Local governance and accountability
- Awareness raising
- Local leadership development

Inclusive and sustainable CBT business/product/service

Analyzing and aligning
- Existing practices of products and services
- Success factors’ review
- Inventory of resources and activity development
- Creation of partnerships

Co-creating and testing

Figure 5.1

Note: The colored areas are the elements of the framework addressed in this module.
MODULE 5 – TRAINING SKILLS – 
FACILITATING A SUS-TOUR SESSION

Why be a SUS-TOUR Facilitator? As you could appreciate during the 1-day training, facilitators have the task of ensuring that participants of the training grasp the core ideas of sustainable CBT as quickly as possible. It is critical to provide the necessary support for participants to develop sustainable business concepts into concrete ideas and maximize the probability of success.

Interactive and creative methods are excellent tools to engage and support participants to understand sustainability, CBT and basic business concepts, and provide the inspiration to put those concepts into practice.

Some relevant information

The training the trainers learning approach

You may wonder why the training has so many activities. The SUS-TOUR pedagogical training approach consists of combining didactic and experiential approaches with concepts that have as an objective, enabling the training participants to develop their own understanding of sustainable CBT ventures and assure a long lasting learning impact to foster innovative solutions. The activities are designed with a two-fold purpose:

- **Promoting innovation and creativity:** This happens when the participants have to find solutions in a simulated situation. This approach encourages risk-taking and the possibility of exploring more options than would be possible in real-life situations. Moreover, it opens the floor for ideas and solutions that may have never occurred in a more formal setting.

- **Enabling a learning atmosphere with high impact:** The activities allow and invite participants to make as many mistakes as possible. The facilitator should help participants to go through the lived experience and build on the learnings resulting from it. Learning is strengthened through written formats that allow participants to revisit their work and individually analyze it. The learning is “owned” by the participant and the impact of the training is thus multiplied.

WHAT DO YOU NEED TO DO TO BE A GOOD TRAINER?

- Lead discussions in a neutral position
- Listen effectively to what the participants are saying
- Help participants to articulate the training content with their personal activities
- Prepare instructions of the activities
- Build relationships with the participants
- Keep an eye on the watch!! Your sessions have a limited time, make sure you cover all the activities in the time allocated for them
## WHERE ARE WE NOW?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Length</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>10</td>
<td>Support the trainer in performing a personal check of skills and capabilities for delivering a SUS-TOUR training session</td>
</tr>
<tr>
<td></td>
<td>Training organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>and flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
MODULE 5 – TRAINING SKILLS – 
FACILITATING A SUS-TOUR SESSION

As trainer, there are some principles that may be convenient for you to keep in mind as they help you to facilitate this hands-on learning cycle among the participants of your training.

1. Create an atmosphere of trust and confidence: This is to make your participants feel comfortable and supported in sharing their thoughts, as this is needed for critical thinking;

2. Be flexible and open-minded: The participants of your training will represent their own views, which means you should expect very different answers and reactions. Your role is to respectfully welcome all perspectives and allow the cross-pollination of viewpoints;

3. Share ownership for the learning process: As a trainer, you are providing a service to create and promote an understanding of CBT opportunities among participants. This is also an invitation for you to help your trainees develop their own leadership skills and discover new elements about sustainable tourism and CBT; and,

4. Create learning opportunities with long-term impact: You are transforming the training activities into an experience that stimulates and challenges the participants of your training. Therefore, your role is to invite them to seek their own learning path. By conducting short reflections after every activity, you increase the chances of having a deeper impact on the participants' learning.

Remember, the symbol ☑️ provides you with tips for enabling the reflection process during your training sessions.

☑️ WHAT DO YOU NEED TO LEARN TO BE A TRAINER?

• Speak in a clear voice and use your body language to engage others into listening to you
• Maintain eye contact
• Maintain a positive attitude
• Listen respectfully to everyone’s opinions

Here are some useful tips for facilitating a productive learning environment for SUS-TOUR trainings:

• Arrange seats in circles or half-moons to give participants a feeling of being at the same level of the facilitator.
• Consider the group size. Five to eight people is a good group size to enable an active and fruitful dynamic that engages every individual and provides an opportunity to hear and be heard. Always consider the time each group needs for reporting back to the plenary.
• Explain your intention and methodology at the beginning of an activity to ensure participants know what to expect.
• Take the participant backgrounds into consideration. First address issues that have generally agreed concepts and progressively move to more innovative or controversial sustainable entrepreneurship issues.
• Emphasize the positive issues that will give participants the confidence to express their ideas honestly and freely.
• Invite participants to be active, but without obligations, so they are free to participate at their own comfort level. Silence or passive participation should always be an option.
ACTIVITY – TRAINER SKILLS SELF ASSESSMENT
(TOTAL TIME: 10 minutes)

Objectives
• Analyze personal strengths and areas of improvement for facilitating a strategy development session

Time allocation
• 1 minute to explain the activity
• 5 minutes for personal reflection
• 4 minutes for open sharing session

Materials
• Self-assessment sheet
• Pens

Room requirements
Enough space for participants to walk around or sit down

People requirements
• 1 person to moderate the session
• 2 or 3 facilitators handing out the self-assessment forms

Process description
• Moderator explains the activity; each person reflects on their own

Reporting methodology
• “Popcorn style,” the moderator asks for a volunteer to share one or two of her/his skills and strengths
• There is no need for everyone to participate in the open sharing session

TEMPLATE SELF-ASSESSMENT FORMAT
To be printed in A4

This self-assessment format is divided in two sections. The first one focuses on your knowledge related to the key topics addressed by SUS-TOUR; the second one is about your experience as a trainer. This activity will help you to identify the areas where you would need more support from other participants of the training or the SUS-TOUR partners for organizing your event as well as the areas where you can help somebody else.

Please use the following scale to rank your readiness to deliver a SUS-TOUR training

Skills
3 – I have a lot of practice; I can help others with this
2 – I have some practice and will need some support
1 – I don’t really know how to do this

Content
3 – Yes, I’m an expert
2 – I have some idea and need reinforcement
1 – I need more learning about this topic

Organization
3 – I know all about this
2 – Need to talk about some details with other trainers
1 – Need to learn more about this

Tip
This assessment sheet is also useful for you AFTER you delivered your training as you can review what went right and what can be improved
## MODULE 5 – TRAINING SKILLS – FACILITATING A SUS-TOUR SESSION

### 1. Facilitation skills

<table>
<thead>
<tr>
<th>Facilitation skills</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am comfortable speaking in public and allow other people to express their opinions even if they don’t reflect my own</td>
<td></td>
</tr>
<tr>
<td>I know how to keep an agenda and observe the times of a session</td>
<td></td>
</tr>
<tr>
<td>I ask open-ended questions that begin with Who, What, When, Why, or How</td>
<td></td>
</tr>
<tr>
<td>I share the importance of active listening and respecting the ideas of others, making sure that all group members have an opportunity to participate</td>
<td></td>
</tr>
<tr>
<td>I know how to ask questions as icebreakers and allow participants to share something about themselves in a non-threatening, enjoyable way</td>
<td></td>
</tr>
<tr>
<td>I can identify non-verbal signs that may indicate that someone wants to respond or ask a question</td>
<td></td>
</tr>
<tr>
<td>I recognize fears or disagreements among group members and I’m comfortable bringing them out into the open</td>
<td></td>
</tr>
<tr>
<td>I give positive reinforcement and feedback with a nod or word of praise</td>
<td></td>
</tr>
<tr>
<td>I use words that everyone is familiar with, avoiding technical or local terms</td>
<td></td>
</tr>
<tr>
<td>I bring the group back to a topic when it strays from the main issue</td>
<td></td>
</tr>
</tbody>
</table>

### 2. Familiarity with content

<table>
<thead>
<tr>
<th>Familiarity with content</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I am familiar with all the definitions of sustainability, sustainable CBT, SDGs and concepts related to them</td>
<td></td>
</tr>
<tr>
<td>I am familiar with the notions of business development, stakeholders, investments, ventures and management-related topics</td>
<td></td>
</tr>
<tr>
<td>I can understand market data and adapt it into my plans and activities</td>
<td></td>
</tr>
<tr>
<td>I am aware of the latest regulations and policies supporting CBT product development</td>
<td></td>
</tr>
<tr>
<td>I know many stakeholders that can support with delivering a SUS-TOUR training</td>
<td></td>
</tr>
</tbody>
</table>

### 3. Organizing a training

<table>
<thead>
<tr>
<th>Organizing a training</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I know a location where the trainings can be provided</td>
<td></td>
</tr>
<tr>
<td>It is possible for me to get access to material for a training (flipcharts, markers…) without extra costs</td>
<td></td>
</tr>
<tr>
<td>I already know the people I would like to partake in my training</td>
<td></td>
</tr>
<tr>
<td>I have delivered other trainings before</td>
<td></td>
</tr>
<tr>
<td>I only need the outline for delivering my session</td>
<td></td>
</tr>
</tbody>
</table>
## WHERE ARE WE NOW?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Length</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>15</td>
<td>Support the trainer in performing a personal check of skills and capabilities for delivering a SUS-TOUR training session</td>
</tr>
<tr>
<td></td>
<td>Training organization and flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
MODULE 5 – TRAINING SKILLS – FACILITATING A SUS-TOUR SESSION

Although this material may seem similar to the content in earlier modules, it is important to take into consideration that this section is meant to address issues at the organizational level. These activities will help you refine the relevant and correct activities to develop your training sessions.

Organizing a SUS-TOUR session

This training program is designed on a 3-step approach towards capacity building and impact creation. Therefore, the activities are ordered according to this flow.

The modules consist of a series of activities that enable the trainer to guide participants through a journey of discovery and co-creation, structured as follows:

1. Introduction of the topic. Clear and concise facts and elements that help participants understanding the context of the module and get a first glance of the concepts to be explored.

2. Applied examples and activities to reaffirm concepts. These come with personal or group reflections that lead from information exchange to knowledge building. The activities of this stage tend to be the longest and require specific room settings as well as materials to be used.

3. To finalize the module, different verification activities take place, either as a summary of concepts or even a small exercise to highlight the parts where some further work may be required.

Each of the modules concludes with the session “debriefing and feedback”. The objective of this section is to summarize the learning from the activities and enable open, constructive feedback. The feedback activities allow participants to share and manage their expectations regarding the training and their capabilities to apply the new concepts as well as to shape a monitoring system adequate for the follow-up of the actions they decided to undertake after the training.

Some relevant information

The structure of the modules – relevant for organization

Each module description is structured as follows:

1. Structure of the module and key topics to be addressed with facilitation suggestions and description
2. Background information to support the discussions and provide new knowledge
3. Notes to the facilitator regarding dialogue prompters, suggested questions for the key topics
4. Instructions and description of material to be used in every activity

When you decide to organize a training, ask yourself the following questions:

- How can you identify the needs of the communities you want to involve and develop initiatives to respond to these needs?
- How many successful entrepreneurs developing CBT products/services would you like to empower?
- How many stakeholders would you like to see taking part in your training?
- Would you involve new people for further training, and how does this fit with academic calendars and institutional structures in your community?
Preparation activities

Think of your training as your business plan: Do you already know where you are going to host it? What material you will need? How much? Where to get it from? Make sure you have a proper checklist to go through all the details for delivering your training. The checklist for the basic SUS-TOUR training is embedded into the moderation plan of the session and it will help you to make sure you have everything you need for successfully delivering your training.

✓ As when performing checks to create a business plan, identify stakeholders and others with whom you can collaborate to organize your workshops. You can identify stakeholders by asking yourself:
  • Who is likely to influence the success or failure of this project?
  • How are these stakeholders related to you and your community?
  • What is their relationship with communities, tour operators, governmental representatives, international organizations…?
  • What would motivate their collaboration or participation in this project?

Internal stakeholders (your community)

Future participants of your trainings, as well as potential allies for developing and delivering your CBT product/service, are part of your community. Therefore it is important to engage this group by sharing the message of sustainable CBT and help them identify synergies.

External stakeholders

There are many individuals, groups and organizations outside of your community that can influence your workshop and subsequent projects. It is important to identify and involve these stakeholders. External stakeholders range from, for example, local government administration and policy makers, media, business organizations such as chambers of commerce, national and international aid and development organizations, and the media. The following are of particular importance:
  • Well-known business people that can inspire others wishing to "make it big"
  • Entrepreneurs that have successfully launched CBT products and businesses, especially if they work in fields related to sustainability
  • Communities that can share experiences on how they became entrepreneurs. Remember that any advice from successful entrepreneurs will be useful. Keywords such as “think fast,” “persevere” and “you need lots of patience and nerves of steel” are very useful when they come in the context of real-life experience
  • People involved in business-related organizations such as chambers of commerce or industrial clubs

Road mapping your activities

At this stage it is advisable to keep a timeline of activities for the coming year or two to later track your advancement. A plan for future events is also useful when discussing the potential of your CBT initiatives with collaborators that could, for example, sponsor an award or speak at a ceremony.

In order to take your vision from idea to reality, it is a good idea to start reaching out to your stakeholders. This can be accomplished through a combination of networking and motivational activities that:
  • Inspire community members to innovate, get involved in the SUS-TOUR, and think creatively in terms of entrepreneurship and sustainability
  • Build proactive and productive networks between complementary stakeholder groups
MODULE 5 – TRAINING SKILLS –
FACILITATING A SUS-TOUR SESSION

Presentations or flip charts?
As trainees only have access to the content portion of the training modules at the end of the training course, you may be willing to present some background information as well as summary points on presentation slides or on a flipchart or board. There is no need to distribute printed copies of materials during the training. During activities, trainees should work on flipcharts in teams.

- Flip charts have the advantage of being able to be hung on walls. This contributes to a lively atmosphere and supports the learning cycle outlined in the entrepreneur’s workbook introduction - trainees tend to reuse learning and ideas gained during the various activities.
- Presentation slides have the advantage of catching the attention of participants and are very useful to provoke direct and quick reactions or reflections.

Recording reporting sessions
It is very valuable if one facilitator or one trainee from each team takes note of the key ideas mentioned during reporting sessions and records the ideas afterwards on a common flipchart (it is often too noisy to write on a flipchart during discussions). It can be hung on a wall and contribute to the learning cycle together with the other activity flipcharts.

SUS-TOUR SESSION FLOW
Basic elements of a training session
1. Icebreaker: It is a welcome activity to show participants how to introduce themselves in an active and catchy manner. The basic icebreaker consists of asking the participants to introduce themselves by saying their names and perhaps another attribute, like the organization they represent. The time to allocate for groups of over 15-20 people may exceed 30 minutes. Do not forget to involve the facilitating team!

As when working with your business plan (Sustainable Business Canvas – Module 4), organizing your workshop requires similar preparation process. Here are some important considerations in order to be coherent between the concepts of SUS-TOUR and the organization of your training:

What makes your workshop sustainable?
- Opt for oral, lively and engaging explanations rather than showing slides and printed sheets
- Provide trainees the opportunity for physical activities (i.e. a walk or other energizing activity)
- Make trainees discover alternatives to meat at lunchtime or offer local, organic food and drinks
- For food left overs, offer the take-away option or donate it. Make sure your caterer does not throw anything away
- Avoid using plastic cutlery and crockery. If choosing disposable options, go for biodegradable ones
- Use scrap paper as well as double-sided printouts when possible to minimize paper use

Below are some basic “to-do’s” that will help you organize high-quality and impactful events:

- Involve “high-level” contacts even if it’s just for an opening speech. The mayor of the city or a well-known community personality normally attracts considerable attention.
- Get media coverage. Either traditional channels or social media outlets. What matters is that your event gets out there.
- Invite local “business heroes” if possible to talk about their experiences as community entrepreneurs. Try to attract speakers that either work in CBT and sustainability-related sectors or who have otherwise shown an understanding or taken actions on tourism and communities in your country.

As when working with your business plan (Sustainable Business Canvas – Module 4), organizing your workshop requires similar preparation process. Here are some important considerations in order to be coherent between the concepts of SUS-TOUR and the organization of your training:

What makes your workshop sustainable?
- Opt for oral, lively and engaging explanations rather than showing slides and printed sheets
- Provide trainees the opportunity for physical activities (i.e. a walk or other energizing activity)
- Make trainees discover alternatives to meat at lunchtime or offer local, organic food and drinks
- For food left overs, offer the take-away option or donate it. Make sure your caterer does not throw anything away
- Avoid using plastic cutlery and crockery. If choosing disposable options, go for biodegradable ones
- Use scrap paper as well as double-sided printouts when possible to minimize paper use

Presentations or flip charts?
As trainees only have access to the content portion of the training modules at the end of the training course, you may be willing to present some background information as well as summary points on presentation slides or on a flipchart or board. There is no need to distribute printed copies of materials during the training. During activities, trainees should work on flipcharts in teams.

- Flip charts have the advantage of being able to be hung on walls. This contributes to a lively atmosphere and supports the learning cycle outlined in the entrepreneur’s workbook introduction - trainees tend to reuse learning and ideas gained during the various activities.
- Presentation slides have the advantage of catching the attention of participants and are very useful to provoke direct and quick reactions or reflections.

Recording reporting sessions
It is very valuable if one facilitator or one trainee from each team takes note of the key ideas mentioned during reporting sessions and records the ideas afterwards on a common flipchart (it is often too noisy to write on a flipchart during discussions). It can be hung on a wall and contribute to the learning cycle together with the other activity flipcharts.

SUS-TOUR SESSION FLOW
Basic elements of a training session
1. Icebreaker: It is a welcome activity to show participants how to introduce themselves in an active and catchy manner. The basic icebreaker consists of asking the participants to introduce themselves by saying their names and perhaps another attribute, like the organization they represent. The time to allocate for groups of over 15-20 people may exceed 30 minutes. Do not forget to involve the facilitating team!
MODULE 5 – TRAINING SKILLS – FACILITATING A SUS-TOUR SESSION

2. Explanation of objectives of the day and agenda: Although it is likely that the participants already have a printout of the agenda, it is important to have a brief introduction to explain the flow of the activities. Do not forget to highlight when the breaks are taking place, as it is the time you may need for setting up the room for other activities.

3. Sessions: They may vary in format and content, but what matters is that you always introduce the activity, explaining what is its objective and provide participants with clear instructions of what their expected role will be. Make sure you distribute the handouts and materials (flipcharts, markers) when it is appropriate. Sometimes if you give all the material at the beginning of the session, people may lose it or not pay attention to the instructions.

4. Breaks: Make sure breaks are properly allocated between sessions and provide enough time for participants to stretch their legs, network and spend some time outside of the work room. Depending on the number of people and if catering is provided or not (i.e. coffee, cookies), you should calculate the amount of time people are likely to spend outside of the room. For trainings between 25 to 30 participants, 15-minute breaks should suffice. For day-lasting sessions, it is important to provide a proper lunchtime that lasts between 30 min to 1 hour if served in the same venue of the training. Consider transport times in case you have to go to other locations.

5. Debriefing and reflection: Towards the end of your training make sure that participants have some time to share their thoughts and key learnings from the session. Invite them to reflect on what caught their attention and what messages they would like to share with people who did not participate in the training.

☑ One of the key tools for a training session is the MODERATION PLAN. This is a chart where you can see the agenda of your training and typically consists of 5 elements:

<table>
<thead>
<tr>
<th>TIME</th>
<th>ACTIVITY</th>
<th>OBJECTIVE AND DESCRIPTION</th>
<th>MATERIAL</th>
<th>RESPONSIBLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>When does the activity begin – when does it need to end?</td>
<td>What is the name of your activity?</td>
<td>What’s the objective of the activity? What are participants meant to do? How?</td>
<td>What do you need for this activity?</td>
<td>Who will deliver the session? Who will provide what material?</td>
</tr>
</tbody>
</table>

**TIPS**

- Add the length of the activity in minutes / hours to have a better track of time
- Use clear names that are also self-explanatory, like “visioning world café”. The name needs to provide context of what is happening
- Be detailed on what is the objective of the session and every step that participants have to go through in order to make sure they will know what to do and how
- Use the material checklist to make sure you have everything! Set up your work room in advance
- Specify with your team who will lead the session and who will be helping with the distribution of the material. If you’re alone, you can always ask for help from the participants to pass the material around if needed
SUS-TOUR Moderation Plan

Now that you know the basic information about how to structure a SUS-TOUR session, here is the moderation plan as you experienced it in the workshop. Please note that the plan itself includes a checklist of material that you have to get ready in order to deliver the session.

It is important that you keep an eye on who is responsible for delivering the different sessions of your agenda as the team needs to connect the story coherently in order to support participants in their learning process.

☑ Always make sure that the presentations are uploaded to the computer and ready to be shown, as well that all material that you will hand out is already prepared and easy to reach for distribution!! This will save you a lot of precious time.

### DAY 1 / MODALITY A

<table>
<thead>
<tr>
<th>Length</th>
<th>Section</th>
<th>Activity</th>
<th>Objective</th>
<th>Activity description</th>
<th>Material</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 min</td>
<td>Overview</td>
<td>Introduction</td>
<td>Introduce the project, its objectives and partners. Allow participants to introduce themselves. Present the objectives of the session and the agenda</td>
<td>The introduction to the project will already contain the definition of CBT for the project</td>
<td>Power point presentation</td>
<td></td>
</tr>
<tr>
<td>5 min</td>
<td>Vision 2030</td>
<td>Kenya Today</td>
<td>Align understanding of successful CBT with the vision 2030 plan of Kenya</td>
<td>Brief presentation of KE2030 plan regarding tourism. Open asking in what ways the chosen definition of CBT fits this vision</td>
<td>Open circle</td>
<td></td>
</tr>
<tr>
<td>10 min</td>
<td>Kenya Today</td>
<td>The opportunity</td>
<td>Introduce a quick picture of the country’s current reality</td>
<td>Quick facts and figures about Kenya, particularly related to tourism</td>
<td>Presentation (or movie?)</td>
<td></td>
</tr>
<tr>
<td>10 min</td>
<td>SWOT</td>
<td>1. Kenya Context</td>
<td>Inspire participants with emotional stories from other communities with successful CBT cases</td>
<td>Present videos of different CBT initiatives in the world</td>
<td>Videos</td>
<td></td>
</tr>
<tr>
<td>20 min</td>
<td>SWOT</td>
<td>Perform an analysis of what are the strengths, weaknesses, opportunities and threats that the communities in Kenya face today</td>
<td>The group is split into 4 group. Each of them will discuss one of the elements of the SWOT for CBT in Kenya. In case of too many participants, there could be eight groups, 2 per SWOT element</td>
<td>Flipcharts, markers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20 min</td>
<td>Reflection and sharing</td>
<td>Create the SWOT for CBTs in Kenya. In case of working with a local group, the SWOT can be done for the particular community</td>
<td>Each group will report the top 3 contents of the part of the SWOT they analyzed. When dealing with large groups, the second group to present on the same element, should mention what hasn’t been addressed by the predecessor. It is important to limit the participation to 3 elements per group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td>BREAK</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# MODULE 5 – TRAINING SKILLS – FACILITATING A SUS-TOUR SESSION

<table>
<thead>
<tr>
<th>Length</th>
<th>Section</th>
<th>Activity</th>
<th>Objective</th>
<th>Activity description</th>
<th>Material</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>35 min</td>
<td>Success factors identification</td>
<td>Success factors identification</td>
<td>Introduce the topic of success factors for CBT and provide a context for the discussion</td>
<td>UNWTO Video presentation and presentation slides</td>
<td>Video and presentation</td>
<td></td>
</tr>
<tr>
<td>5 min</td>
<td>Introductory to success factor identification template</td>
<td>Success factors identification template</td>
<td>Presentation of success factors for tourism and a workable template to be used with communities</td>
<td>Short presentation of what defines success factors for CBT and how to understand the template</td>
<td>Presentation</td>
<td></td>
</tr>
<tr>
<td>50 min</td>
<td>Success factors discussion (Assimilation)</td>
<td>Success factors discussion</td>
<td>Identify the most relevant success factors for CBTs to flourish</td>
<td>5 groups will be formed, each will get 2 cases of CBT (one KE, 1 international). Using the success factor format, the groups will analyze the cases from the Kenya perspective</td>
<td>10 cases of CBT, success factor format</td>
<td></td>
</tr>
<tr>
<td>45 min</td>
<td>LUNCH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20 min</td>
<td>Stakeholder mapping</td>
<td>Understanding the demands, needs and expectations from key stakeholder groups</td>
<td>The group will be divided into 4 to 8 teams (depending of number of participants) and discuss the general impact of stakeholders</td>
<td>Stakeholder impact analysis template</td>
<td></td>
<td></td>
</tr>
<tr>
<td>75 min</td>
<td>From expectations to products</td>
<td>Brainstorm on the potential products/services that communities can offer to the different stakeholders</td>
<td>This session is developed in two rounds, the first round lasts 20 minutes. The initial groups will be given a persona ID card and analyze it. They will fill in the ID template. Afterwards, new groups will be formed (5 min), in each group there will be one stakeholder representing their own interests. For 50 min groups will discuss about what can they develop to satisfy the demands of the different stakeholders</td>
<td>Persona ID cards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>55 min</td>
<td>Consolidation</td>
<td>Cross check of the products brainstormed during the expectations discussion with the success factors and the SWOT of their communities</td>
<td>Each team will have 30 minutes to do the cross check and 5 minutes to present one product for CBT they think they can develop based on their discussions on demands from stakeholders, the Kenya SWOT and the success factors for CBTs</td>
<td>Instructions ppt, flipchart, markers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 min</td>
<td>BREAK</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The table continues on the next page
## DAY 1 / MODALITY A

<table>
<thead>
<tr>
<th>Length</th>
<th>Section</th>
<th>Activity</th>
<th>Objective</th>
<th>Activity description</th>
<th>Material</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 min</td>
<td></td>
<td>Introduc-</td>
<td>Present the SBF and start the creation of a plan per community</td>
<td>Participants will be given the canvas for them to use all the material developed during the workshop and develop a product/service they would like to introduce into their communities</td>
<td>Sustainable Business Framework for CBT</td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td>4. CBT Business Plan (SBF)</td>
<td>Drafting the plan</td>
<td>Draft the first plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td></td>
<td>Preparing for CIW</td>
<td>Introduce the next steps for the plan: implementation and preparation for presentation of consolidated plan (taking place later, during the CIW) or review to create new ones within their own communities</td>
<td>Participants will be made aware they can continue working on their plans with the support of the project partners and that they have to be ready to present later</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td>Closing day 1</td>
<td>Certificates of participation are given to people that are not partaking the facilitation segment</td>
<td></td>
<td></td>
<td>Presentation</td>
<td></td>
</tr>
</tbody>
</table>
## MODULE 5 – TRAINING SKILLS – FACILITATING A SUS-TOUR SESSION

### DAY 2 / MODALITY A

<table>
<thead>
<tr>
<th>Length</th>
<th>Section</th>
<th>Activity</th>
<th>Objective</th>
<th>Activity description</th>
<th>Material</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 min</td>
<td></td>
<td>Welcome back</td>
<td>Quick recap of the previous day activities</td>
<td>Quick presentation with objectives of SUS-TOUR and of the ToT. Reminder of the relevance of CIW and the role they will play for it (training others and bringing their ideas to the workshop)</td>
<td>Presentation</td>
<td></td>
</tr>
<tr>
<td>10 min</td>
<td></td>
<td>Self-assessment</td>
<td>Participants have the opportunity to analyze their personal strengths and areas of improvement for facilitating a strategy development session</td>
<td>Each participant will receive a self-assessment form for their reflection and an open circle will be created to share the highlights of the assessment (should participants choose to do so)</td>
<td>Handout of self-assessment form</td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td>5. Training skills</td>
<td>Going through the training flow</td>
<td>Presentation of the trainer workbook and support for facilitation skills</td>
<td>Participants are aware they went through an experiential learning process and now they are handed the training guide. This session has open Q&amp;A about the methodology, sources and feedback</td>
<td>Printouts of the training workbooks</td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td></td>
<td>Preparation</td>
<td>Participants will have chance to prepare to deliver a mock training session</td>
<td>After picking one of the components of the training, the participants will go through the workbook to prepare the session they will present</td>
<td></td>
<td></td>
</tr>
<tr>
<td>90 min</td>
<td></td>
<td>Dry runs</td>
<td>Each participant will facilitate a short session about the topic they got at the beginning of the activity (the topic is part of the SUS-TOUR training flow)</td>
<td>Sessions are meant to last 5 minutes if it is a single presenter or 10 if they’re working in teams. They will receive feedback upon the ending of their presentations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td></td>
<td>Closing day 1</td>
<td>Participants are handed their certificates and have to sign their commitment to delivering the training as stipulated by SUS-TOUR</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## MODULE 5 – TRAINING SKILLS – FACILITATING A SUS-TOUR SESSION

### DAY 1 / MODALITY B

<table>
<thead>
<tr>
<th>Length</th>
<th>Section</th>
<th>Activity</th>
<th>Objective</th>
<th>Activity description</th>
<th>Material</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>60 min</td>
<td>Introduction</td>
<td>Overview</td>
<td>Introduce the project, its objectives and partners. Allow participants to introduce themselves. Present the objectives of the session and the agenda.</td>
<td>The introduction to the project will already contain the definition of CBT for the project.</td>
<td>Power point presentation</td>
<td></td>
</tr>
<tr>
<td>5 min</td>
<td>Vision 2030</td>
<td>Vision 2030</td>
<td>Align understanding of successful CBT with the vision 2030 plan of Kenya.</td>
<td>Brief presentation of KE2030 plan regarding tourism. Open asking in what ways the chosen definition of CBT fits this vision.</td>
<td>Open circle</td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td>Kenya today</td>
<td>Kenya today</td>
<td>Introduce a quick picture of the country’s current reality.</td>
<td>Quick facts and figures about Kenya, particularly related to tourism.</td>
<td>Presentation (or movie?)</td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td>The opportunity</td>
<td>The opportunity</td>
<td>Inspire participants with emotional stories from other communities with successful CBT cases.</td>
<td>Present videos of different CBT initiatives in the world.</td>
<td>Videos</td>
<td></td>
</tr>
<tr>
<td>40 min</td>
<td>1. Kenya Context</td>
<td>SWOT</td>
<td>Perform an analysis of what are the strengths, weaknesses, opportunities and threats that the communities in Kenya face today.</td>
<td>The group is split into 4 groups, each of them will discuss one of the elements of the SWOT for CBT in Kenya. In case of too many participants, there could be eight groups, 2 per SWOT element.</td>
<td>Flipcharts, markers</td>
<td></td>
</tr>
<tr>
<td>20 min</td>
<td>Reflection and sharing</td>
<td>Reflection and sharing</td>
<td>Create the SWOT for CBTs in Kenya. In case of working with a local group, the SWOT can be done for the particular community.</td>
<td>Each group will report the top 5 contents of the part of the SWOT they analyzed. When dealing with large groups, the second group to present on the same element, should mention what hasn’t been addressed by the predecessor. It is important to limit the participation to 3 elements per group.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td>BREAK</td>
<td>Break</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Module 5 – Training Skills – Facilitating a Sus-Tour Session

<table>
<thead>
<tr>
<th>Length</th>
<th>Section</th>
<th>Activity</th>
<th>Objective</th>
<th>Activity description</th>
<th>Material</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>35 min</td>
<td>1. Success factors</td>
<td>Success factors identification</td>
<td>Introduce the topic of success factors for CBT and provide a context for the discussion</td>
<td>UNWTO Video presentation and presentation slides</td>
<td>Video and presentation</td>
<td></td>
</tr>
<tr>
<td>5 min</td>
<td>2. Success factors</td>
<td>Introducti-on to success factor identifi-cation template</td>
<td>Presentation of success factors for tourism and a workable template to be used with communities</td>
<td>Short presentation of what defines success factors for CBT and how to understand the template</td>
<td>Presentation</td>
<td></td>
</tr>
<tr>
<td>80 min</td>
<td>Success factors discussion</td>
<td>Identify the most relevant success factors for CBTs to flourish</td>
<td>5 groups will be formed, each will get 2 cases of CBT (one KE, 1 international). Using the success factor format, the groups will analyze the cases from the Kenya perspective</td>
<td>10 cases of CBT, success factor format</td>
<td></td>
<td></td>
</tr>
<tr>
<td>45 min</td>
<td>LUNCH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30 min</td>
<td>Experts’ talk</td>
<td></td>
<td>Provide inspiration for starting idea generation processes</td>
<td>Keynote from a practitioner relating to her/his journey towards CBT development emphasizing the challenges encountered, partnerships formed and learning along the journey</td>
<td></td>
<td></td>
</tr>
<tr>
<td>60 min</td>
<td>Stakeholder mapping</td>
<td></td>
<td>Understanding the demands, needs and expectations from key stakeholder groups</td>
<td>The group will be divided into 4 to 8 teams (depending on number of participants) and discuss the general impact of stakeholders.</td>
<td>Stakeholder impact analysis template</td>
<td></td>
</tr>
<tr>
<td>90 min</td>
<td>Idea generation</td>
<td>From expectations to products</td>
<td>Brainstorm on the potential products/services that communities can offer to the different stakeholders</td>
<td>This session is developed in two rounds. The first round lasts 35 minutes. The initial groups will be given a persona ID card and analyze it. They will fill in the ID template. Afterwards, new groups will be formed (5 min), in each group there will be one stakeholder representing their own interests. For 50 min groups will discuss about what can they develop to satisfy the demands of the different stakeholders</td>
<td>Persona ID cards</td>
<td></td>
</tr>
<tr>
<td>60 min</td>
<td>Consolida-tion</td>
<td>Cross check of the products brainstormed during the expectations discussion with the success factors and the SWOT of their communities</td>
<td>Each team will have 30 minutes to do the cross check and 5 minutes to present one product for CBT they think they can develop based on their discussions on demands from stakeholders, the Kenya SWOT and the success factors for CBTs</td>
<td>Instructions ppt, flipchart, markers</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# MODULE 5 – TRAINING SKILLS – FACILITATING A SUS-TOUR SESSION

<table>
<thead>
<tr>
<th>Length</th>
<th>Section</th>
<th>Activity</th>
<th>Objective</th>
<th>Activity description</th>
<th>Material</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 min</td>
<td></td>
<td>Introduction to the business canvas</td>
<td>Present the SBF and start the creation of a plan per community</td>
<td>Participants will be given the canvas for them to use all the material developed during the workshop and develop a product/service they would like to introduce into their communities</td>
<td>Sustainable Business Framework for CBT</td>
<td></td>
</tr>
<tr>
<td>180 min</td>
<td>4. CBT Business Plan (SBF)</td>
<td>Drafting the plan</td>
<td>Draft the first plan and initial pitching</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td></td>
<td>Preparing for CIW</td>
<td>Introduce the next steps for the plan: implementation and preparation for presentation of consolidated plan (taking place later, during the CIW) or review to create new ones within their own communities</td>
<td>Participants will be made aware they can continue working on their plans with the support of the project partners and that they have to be ready to present later</td>
<td>Presentation</td>
<td></td>
</tr>
<tr>
<td>60 min</td>
<td>LUNCH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 min</td>
<td>Welcome back</td>
<td>Quick recap of the previous day activities</td>
<td>Quick presentation with objectives of SUS-TOUR and of the ToT, Reminder of the relevance of CIW and the role they will play for it (training others and bringing their ideas to the workshop)</td>
<td>Presentation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 min</td>
<td></td>
<td>Self-assessment</td>
<td>Participants have the opportunity to analyze their personal strengths and areas of improvement for facilitating a strategy development session</td>
<td>Each participant will receive a self-assessment form for their reflection and an open circle will be created to share the highlights of the assessment (should participants choose to do so)</td>
<td>Handout of self-assessment form</td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td>5. Training skills</td>
<td>Going through the training flow</td>
<td>Presentation of the trainer workbook and support for facilitation skills</td>
<td>Participants are aware they went through an experiential learning process and now they are handed the training guide. This session has open Q&amp;A about the methodology, sources and feedback</td>
<td>Printouts of the training workbooks</td>
<td></td>
</tr>
<tr>
<td>15 min</td>
<td>Preparation</td>
<td>Participants will have chance to prepare to deliver a mock training session</td>
<td>After picking one of the components of the training, the participants will go through the workbook to prepare the session they will present</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90 min</td>
<td>Dry runs</td>
<td>Each participant will facilitate a short session about the topic they got at the beginning of the activity (the topic is part of the SUS-TOUR training flow)</td>
<td>Sessions are meant to last 5 minutes if it is a single presenter or 10 if they’re working in teams. They will receive feedback upon the ending of their presentations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30 min</td>
<td>Closing day 1</td>
<td>Participants are handed their certificates and have to sign their commitment to delivering the training as stipulated by SUS-Tour</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Module 5 – Training Skills – Facilitating a Sus-Tour Session

## Where Are We Now?

<table>
<thead>
<tr>
<th>Topic</th>
<th>Session</th>
<th>Length</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Icebreaker</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision 2030</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 1. Kenya Context</td>
<td>Kenya Today</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CBT opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SWOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 2. CBT Success Factors</td>
<td>Identification</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assimilation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 3. Idea generation</td>
<td>Stakeholder mapping</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td></td>
<td>From expectations to products</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consolidation of ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 4. CBT Business Plan</td>
<td>Introduction of the Business Canvas</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Drafting the plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preparation for CIW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Module 5. Training skills</td>
<td>Self-assessment</td>
<td>15</td>
<td>Introduction of tips for strengthening communication skills needed for</td>
</tr>
<tr>
<td></td>
<td>Training organization</td>
<td></td>
<td>delivering the workshop as well as for putting forward CBT ideas</td>
</tr>
<tr>
<td></td>
<td>and flow</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Skills building</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dry runs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback and next steps</td>
<td></td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Closing ceremony</td>
<td></td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
Module 5 – Training Skills – Facilitating a SUS-Tour Session

In module 2 you were introduced to the basic success factors for a CBT venture. In this module, you will go deeper into some of the skills that are needed for enabling these factors to happen. Please note that this is a basic introduction and that honing your skills requires practice, learning from mistakes, accepting feedback and being constant in your efforts.

Leadership Styles

1. Autocratic
   a) Leader makes decisions without reference to anyone else
   b) High degree of dependency on the leader
   c) Can create demotivation and alienation of staff
   d) May be valuable in some types of business where decisions need to be made quickly and decisively

2. Democratic
   a) Encourages decision making from different perspectives – leadership may be emphasised throughout the organisation
   b) Consultative – process of consultation before decisions are taken
   c) Persuasive – Leader takes decision and seeks to persuade others that the decision is correct

3. Laissez-Faire
   a) ‘Let it be’ – the leadership responsibilities are shared by all
   b) Can be highly motivational as people have control over their working life
   c) Can make coordination and decision making time consuming and lacking in overall direction
   d) Relies on good team work
   e) Relies on good interpersonal relations

4. Paternalistic
   a) Leader acts as a ‘father figure’
   b) Paternalistic leader makes decision but may consult
   c) Believes in the need to support staff

Leadership Skills

Sources of Power
To understand leadership requires insight into the possession and use of power. Power is a person’s capacity to influence the behaviors and attitudes of others.

1. Legitimate power (Office) – comes from a person’s formal position in an institution and the authority that accompanies that position.
2. Reward power – stems from a person’s ability to bestow rewards and is mostly organization-based source of power.
3. Coercive power – an organizationally-based source of power derived from a leader’s control over punishment or the capacity to deny rewards.
4. Expert power – influence derived from a person’s special knowledge or expertise in a particular area.
5. Reference power – personal power that results when one person identifies with and admires another.
6. Charisma power – the ability to inspire, administrate, respect, and be loyal to, as well desire to emulate, based on some intangible set of personality traits – a personal source of power.
7. Information power – power that is a result of having access to important information that is not common knowledge or having that ability to control the flow of information to and from others.
8. Affiliate power – power derived by virtue of a person’s association with someone else who has some source of power.
9. Leader by moral example.

Developing Team Leader Skills

1. Build a Mission Statement
2. Show your team members that they are trusted
3. Encourage team members to recognize each others’ accomplishments
4. Establish a sense of urgency and High Performance standards
5. Encourage honest criticism
6. Use team symbols
7. Use peer evaluations
8. Help team members see the ‘Big Picture’
9. Minimize formation of ‘In-groups’ and ‘Out-groups’.

Definitions kindly provided by STTA Kenya
MODULE 5 – TRAINING SKILLS –
FACILITATING A SUS-TOUR SESSION

Communication²

The success of your workshop and further product/service planning depends in good measure on how well you communicate your ideas. It doesn’t mean that you have to be a natural-born communicator. This skill is mainly about being able to talk openly about your idea and showing confidence in yourself and your plan.

Don'ts

- Trying to win, win and just win: A presentation is not a competition. The aim of a successful dialoguing is to find a solution with which all the parties involved “win” or at least feel satisfied.
- Become emotional: sometimes people become emotional when bottlenecks or obstacles appear during the dialogues. However, losing control of your behavior can make it difficult to lead the conversation down a constructive path. If somehow you think that you are losing control of emotions, suggest a break, relax and when you have regained your composure, restart the presentation.
- Disregard the interests of your counterpart: If you understand the reasons why your counterpart is willing to spend time listening to you, you will be able to find alternatives to achieve a “win-win” situation.
- Focus on persons rather than issues: Even though your counterpart is somebody who you like or dislike very much, you have to focus on the issue that has motivated the presentation.

Do's

- State your needs and your alternatives: Before starting to present, you have to have a clear picture of what and why you want to present your idea. Answer the following questions: What do I expect from the other person? What do I want to achieve? What if I cannot achieve what I want? Are there any alternatives within the presentation that can satisfy my initial needs?
- Develop alternatives for your counterpart: presenting potential scenarios of action are some engagement tactics (i.e. “if I do this (x), would you do this (y) for me?,” “what if you instead of doing (x), would you do (y)?” This helps to achieve agreements that strengthen future relations.
- Be willing to listen: During presentations, avoid unnecessary talk due to nervousness or simply to impose your statements and demands. Remember that communication happens between two or more parties and is based on common dialogue.
- Transmit a good feeling after the presentation: Once it has finished, do not jump off the table and leave. Approach your counterpart and invite her/him to a cup of coffee, talk about topics that do not have anything to do with the presentation. Try to give the feeling that the difficulties within the project presented are related to the process as such but do not have anything to do with the person.

² Adapted from CSCP’s training program “SMART Start-up”
ACTIVITY – MOCK PRESENTATIONS
(TOTAL TIME: 90 minutes)

Objectives
• Prepare a session of the training to check understanding of concepts and of facilitation skills
• Receive feedback from peers about training styles

Time allocation
• 1 minute to explain the activity
• 10 minutes to read session outline and prepare
• If having a group of 10 trainers to-be, then 5 minutes per presentation
• 3-minute feedback after every session

Materials
• Trainers’ workbook
• Scrap papers with the name of the session for the participants to pick their topic. These topics are: SWOT analysis, CBT Success factors, Stakeholder mapping, Idea generation, Sustainable Business Canvas. In case of larger groups, other topics to discuss are: Kenya context today, Training skills

Process description
• In case of large groups: 6 to 8 groups are formed, and one representative goes to the front and picks a topic
• In case of small groups, the people can work in pairs or even individually
• Moderator explains the activity, making sure that participants understand that their presentations have to cover
  o Relevance of the topic for SUS-TOUR, CBTs and business development in general (why is this topic part of the SUS-TOUR training)
  o Is it a concept, a tool, a method or a combination of both? How does this apply to CBT business development? (How can this topic/tool be helpful in general?)
  o What are the main advantages of this tool/method/concept?
• Participants are made aware of the following criteria for their presentations: Clarity of the topic – did everyone in the group understand what were they talking about? Group work – does the presentation show how the group worked together? Were all included in the presentation? Originality of presentation – did the team do something different than just standing in front of the group? Did they manage to capture the attention of all the attendees?
• Trainer to-be studies the topic in the workbook and prepares to present
• Each person/team presents their topic
• The group provides feedback after every presentation considering the three criteria points as well as any other feedback they consider useful

Reporting methodology
• The feedback has to be on clarity of presentation, communication approach, understanding of topics and material used
REFERENCES

Preamble

Online Resources

Online Resources

Online Resources

Online Resources

Online Resources

Online Resources

Online Resources

Online Resources

Online Resources

Online Resources
REFERENCES


UN Secretary-General, (2010). Progress to date and remaining gaps in the implementation of the outcomes of the major summits in the area of sustainable development, as well as an analysis of the themes of the conference. Report for the Preparatory Committee for the United Nations Conference on Sustainable Development. New York: United Nations.


Module 1


Module 2


Module 3


REFERENCES

Module 4
http://www.ifc.org/ifcext/enviro.nsf/AttachmentsByTitle/p_StakeholderEngagement_Full/$FILE/IFC_StakeholderEngagement.pdf
http://www.businessmodelgeneration.com/
Website of Alex Osterwalder (2009): http://alexosterwalder.com/

Module 5
Smith, Mark K. (2001; 2009) Facilitating learning and change in groups, the encyclopedia of informal education. Online available:
www.infed.org/biblio/b-facil.htm
"Ace Institutional Support Toolkit” from the program "Teaching and Igniting Young Canadians to Create Brighter Futures for Themselves and Their Communities"
Website of The Sustainable Dance Club: http://www.sustainabledanceclub.com/
Website of Pecha Kucha 20x20: http://www.pecha-kucha.org/
Global Entrepreneurship Week: http://www.unleashingideas.org
World Student Council for Sustainable Development: http://www.wscsd.org
Netimpact: http://www.netimpact.org

Images and icons / When not referenced here, the icons and images used in the diagrams and templates are owned by the CSCP.

Copyright© Collaborating Center on Sustainable Consumption and Production (CSCP) GmbH.

Author / Georgina Guillen-Hanson - CSCP. SUS-TOUR Project Director
Contributions / Marcel Leijzer – United Nations World Tourism Organization / Federation of Community Based Tourism Organization (FECTO) / Ecotourism Kenya (EK)
Design / Eva Rudolf – CSCP / Mohammed Hassan – CSCP
**SWOT TEMPLATE**

<table>
<thead>
<tr>
<th>INTERNAL (within your community)</th>
<th>HELPFUL (for your objective)</th>
<th>HARMFUL (for your objective)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>STRENGTHS</td>
<td>WEAKNESSES</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EXTERNAL (outside your community)</td>
<td>OPPORTUNITIES</td>
<td>THREATS</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SWOT GUIDELINES

INTERNAL FACTORS
(Strengths and Weaknesses)

These include your resources and experiences. General areas to consider:

- Human resources - staff, volunteers, board members, target population
- Physical resources - your location, building, equipment
- Financial - grants, funding agencies, other sources of income
- Activities and processes - programs you run, systems you employ
- Past experiences - building blocks for learning and success, your reputation in the community

Don't be too modest when listing your strengths. If you're having difficulty naming them, start by simply listing your characteristics (e.g., we're well known destination). Some of these will probably be strengths.

Identify strengths and weaknesses from both your own point of view and that of others, including those you serve or deal with.

Do others see problems—or assets—that you don't? You may know already if you've listened to those you serve.

EXTERNAL FACTORS
(Opportunities and Threats)

Forces and facts that your community does not control include:

- Future trends in your field or the culture
- The economy - local, national, or international
- Funding sources - foundations, donors, legislatures
- Demographics - changes in the age, race, gender, culture of those you serve or in your area
- The physical environment (Is your building in a growing part of town? Is the bus company cutting routes?)
- Legislation (Do new federal requirements make your job harder...or easier?)
- Local, national or international events

Cast a wide net for the external part of the assessment. No organization, group, program, or neighborhood is immune to outside events and forces. Consider your connectedness, for better and worse, as you compile this part of your SWOT list.
CRITICAL SUCCESS FACTORS TEMPLATE

Please assess the following critical success factors for your CBT product (5 fully covered; 4 almost covered, 3 partly covered, 2 somewhat covered and 1 not covered at all)

<table>
<thead>
<tr>
<th></th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
<th>Reason of score given</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participation in the decision making process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local ownership</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collective responsibility</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local innovation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sharing of resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sharing of benefits among members</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leadership and management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partnership and outside support</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business skills – the CBT project does have the skills needed to run a business (business planning, marketing, finances etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Achieving authenticity – do you have clearly defined Unique Selling Points?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Achieving distinction – is the destination attractive enough?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Skills – does the community have the skills needed to meet customer expectations?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CBT CASE STUDIES

**Note to facilitator:** the cases are available for download at the SUS-TOUR website. Below is a reference list of these cases. Please note that some cases represent the same organization but they are introducing a different tourism product.

**Index**

*International cases*
- Akha Experience Laos
- Akha Experience Taquile Island, Peru
- Ccaccacollo Weaving Cooperative, Canada
- Chambok Community Based Eco tourism, Cambodia
- Daureb Tour Guide Association, Namibia
- Kabani, South India
- Khama Rhino Sanctuary Trust, Botswana
- Manda Wilderness Community Trust, Mozambique
- Village Ways, India, Ethiopia and Nepal
- Village life, Romania
## STAKEHOLDER CHART

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>What are their principal interests?</th>
<th>Why are they important for your CBT business?</th>
<th>How can you engage with them?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customers</td>
<td>National visitor</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>International visitor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community members</td>
<td>directly engaged in the business</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Families of community members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tour Operators</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associations and unions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service providers</td>
<td>(internet, health, office supplies, infrastructure)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marketers and sales representatives</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Governments/ regulators</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
ANNEX C – MODULE 3

PERSONA ID CARDS – TOURISTS

Suggestion to the user: make the needed copies of this page before cutting the cards.

PEDRO ALMEIDA

Nationality: Brazilian / Age: 26 / Gender: Male
Family status: Single, shares apartment with two friends in São Paulo
Occupation: Junior consultant in a multinational company
Travel needs: Discovery. As he spends too much time behind a desk, during his spare time, he seeks adventure in nature and interesting destinations to spend some time exploring different ways of living that he can later on discuss with his friends.
Average length of holidays: 3 weeks +

Consumer attitude: Aspirational
He normally does not mind the price as long as he knows that the places visited and products consumed, besides being popular (cool) are also safe and healthy. Moreover, for him it is important that the people behind the products have fair wages and that the environment is not harmed either.
Biggest concerns as tourist: Lack of Internet connection. Need to use too much cash (prefers credit card or online payments). Lack of vegetarian options for meals, as he prefers to consume only organic products; if they are gluten-free, even better.
Traveling preparation: Prefers destinations that do not ask for visas or that offer simple visa processes (e-application, upon arrival).
Personal statement
“I like to see the highlights of the world, explore them and embrace their diversity, both in terms of nature and people. I enjoy genuine experiences that allow me to meet new people, live great experiences with few resources and do something good for the others. Of course I also like to enjoy nature and go to places not too many people have been before so I can share it on social media. It makes me feel like my credit card, a true citizen of the world with no limits, that knows what is to be out of the ordinary… in style, of course.”

UINQUING HONG

Nationality: Chinese / Age: 53 / Gender: Female
Family status: Divorced, likes traveling with her son
Occupation: Civil servant
Travel needs: Relax. As she has a very stressful job and lives in Shanghai, the most populated city in China, and further has to travel to Guangzhou and Beijing (also largest urban areas) often, she cherishes the time off to relax and indulge herself.
Average length of holidays: 7 days, particularly in October during the National Holiday season.

Consumer attitude: Indifferent
She is unlikely to make proactive choices for more sustainable goods just because they are sustainable. Her sense of responsibility to society and nature is not really high and she is not very likely to try new things unless following recommendations from trusted sources. She is more inclined to follow the advice from her peers and to trust the advice of tour operators than that provided by strangers.
Biggest concerns as tourist: Being alone in an unknown place and having to communicate with the locals, as she only speaks Chinese and very little English.
Traveling preparation: Packages to travel with Chinese-speaking groups that include guides, transportation and can be paid in advance in China.
Personal statement
“I like traveling with my son, but he is now 29 and it is time for him to get married and settle down. He can’t travel with me anymore. My cousin and two other friends normally get great packages through travel agencies. They like going to different places where new relaxation experiences are practiced, and also to nice places where doing some good shopping is possible. I work a lot so I really want to escape from the noise when I am on holidays and I am fine with going abroad if my friends are going too.”
**MARTIN SCHMIDT**

Nationality: German / Age: 68 / Gender: Male  
Family status: Married. Father of two, grandfather of five.  
Occupation: Retired  
Travel needs: Be together. Stability – he needs friendly solutions for people with limited mobility  
Average length of holidays: 2 weeks  
Consumer attitude: Practical  
Gets discouraged by high prices and low performance. He sees sustainability as a bonus after price and performance.

**Biggest concerns as tourist:** Access for disabled people. He uses a walking frame and for long distances sometimes prefers to use a wheelchair. His wife is 71 years old. Although she is more active than him, she also prefers something adequate for Martin’s walking capabilities.  
Traveling preparation: After speaking with travel agents, he normally uses online “comparison” portals to check value for money. Normally one of his sons or grandchildren helps him read the reviews from other users. He likes packages that include offers for people with different abilities and comfortable mobility options.

**Personal Statement**

“Despite my mobility limitations, I am still very active. My wife and I worked very hard and now we really want to enjoy life. To me, it is important to learn about different cultures and their ways of living and coexisting with nature. I love beautiful sights of nature as much as unique architecture and places that seem to be the crystallization of someone’s dreams. And of course, I want to do it in a way that is also friendly with my pocket. My pension doesn’t give me that much, so I need to make sure it is worth it.”

---

**AMY CROMPTON**

Nationality: US / Age: 41 / Gender: Female  
Family status: Married, mother of two children aged 12 and 6  
Occupation: Part time nurse and teacher in an elementary school  
Travel needs: Be together. For the kids – she prefers options that offer activities in groups that allow the family to have fun, relax and enjoy the time together  
Average length of holidays: 10 days – depending on the school calendar  
Consumer attitude: Advocate  
She likes researching the places they will visit as well as finding the most information about what is unique about the place in terms of the environment and societies living there. She has the potential to have a huge influence on others by taking action on the issues she cares about. She doesn’t like shopping and has problems trusting brands or multinational companies, as she looks for authenticity and real positive impact on societies and nature alike.

**Biggest concerns as tourist:** Family friendly activities. She likes a mix between activities for children and youth only, which allows her and her husband to have “solo” time, but also activities that bring the family together. She also likes when her children have the chance to make friends with children of other cultures.  
Traveling preparation: She likes speaking with other parents about their holiday experiences and she also likes spending time researching online about the options that offer interesting adventures for her family. For her, it is important to speak with an agent or get answers to her questions in forums as ways of clarifying all her doubts before booking any option that she and her husband find interesting.

**Personal statement**

“My children and their well-being is my priority, and that means I’m very concerned about the future generations in general. I don’t mind paying more for what is socially and environmentally responsible, as I believe it highlights the added value that truly responsible solutions represent. For my leisure activities, this responsibility also implies safety and stability, I want our family to have fun in a safe environment where we can be active and create memorable experiences together.”
**PERSONA ID CARDS – NATIONAL STAKEHOLDERS**

**MWENI KIOKO**

**Age:** 61  
**Gender:** Female  
**Family status:** Married, takes care of her grandchildren  
**Occupation:** Craft workshop owner/hostess  
**Education:** 8th grade elementary school

**Motivation to participate in CBT:** Improve livelihood  
**Biggest concern about CBT:** As a host, she expects transparent management of the income generated by the tourists visiting her community and to be paid fairly based on the returns they make. She also expects their products to fetch proper prices that reflect the labor they put in them.

**Personal statement**  
“We all work very hard to make our guests feel welcome and interested in learning more about our culture and ways of living. Kenya is famous for its hospitality and when I open the doors of my workshop, I’m opening the doors of my house as well. It is important that not only the community representatives, but also tour operators and other tourism agencies respect our work and treat us as serious business partners. I am thankful for the national and international unions and organizations interested in our activities, as they encourage us to perform better and make us realize we are not alone in this journey. That is why I also expect them to equip us with the necessary skills so that we can improve and become better, and make our products more attractive.”

© by Rod Waddington / Creative Commons

---

**DR. CYPRIAN OTIENO AWITI**

**Age:** 40  
**Gender:** Male  
**Family status:** Married, father of two  
**Occupation:** Project manager at the Ministry of Environment, Natural Resources and Regional Development Authorities  
**Education:** PhD and Master degree from a university in the UK

**Motivation to participate in CBT:** Promote economic development while protecting eco-diversity, protecting our land reserves and dealing with landowners

**Biggest concern about CBT:** That the products and services offered by the community can have high-quality standards to meet the demands of the consumers without compromising the integrity of the environment and the work of other communities or traditional tourism.

**Personal statement**  
“CBT has the potential to increase our competitiveness as a tourism destination. That is why we need to guarantee that everything is in place to make it flourish; from having the right offers from the communities, to making them easily accessible by road or through other means, so that visitors are able to enjoy the nature even as they drive by. Infrastructure is indeed one of our priorities, as we are advocating for green, sustainable solutions to fulfill our vision of clean, healthy and safe environment.”
CAROLYNE MULEKA

Age: 28
Gender: Female
Family status: Single
Occupation: Promoter of community based tourism – Marketing consultant
Education: Master in Marketing and Public Relations

Motivation to participate in CBT: Having worked with the civil society sector, she wants to support empowerment of local leaders and show how communities can offer high value products and services, but at a reasonable price

Biggest concern about CBT: Lack of interest or knowledge among the community members. They need to be able to keep up with the changing demands of tourism, be very familiar with what attracts tourists to their local areas, and have the skills to clearly communicate this information.

Personal statement
“I am a local tourist. I like visiting and seeing the beauty of the countryside and that is why it is important to me that both local and international tourists are capable of finding what they are looking for. Some may think I’m overambitious when I say that it is important to have at least three people in a given community who are capable of maintaining communication about their activities through social media. The opportunity is there. If we want to succeed, we need to be able to keep up with the demands of the world and present ourselves as a modern nation proud of its traditions and as well as its heritage.”

PETER KARIUKI

Age: 52
Gender: Male
Family status: Separated.
Fully supports the mother of his kids and their three children
Occupation: True Tours Kenya founder and director
Education: Diploma on Tourism Management, Bachelor of Education

Motivation to participate in CBT: Diversify the agency’s portfolio and strengthen the tourism sector

Biggest concern about CBT: Unclear local governance structures that may lead to potential time wastage talking to the wrong people or even economic loss if what is delivered is not what was promised.

Personal Statement
“I grew up in close contact with nature and my rural community, since I used to travel quite often from the city to the village to visit my grandparents. My main motivation in studying hard even at the university level was to be able to improve the living conditions in my village and those of my family. While at university, studying bachelor of education, I had the opportunity to work as an Assistant Travel Consultant. This awakened my interest in the industry and motivated me to pursue a diploma course in tourism management. After the course I created True Tours with the essence of providing visitors with unique, true experiences. I really value the life in the villages and believe they can provide an unforgettable and positive experience to those who visit them.”
<table>
<thead>
<tr>
<th>The environment (flora and fauna)</th>
<th>Cultural heritage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment and fun</td>
<td>Gastronomy</td>
</tr>
<tr>
<td>Art, festivals and other events</td>
<td>Scenery (natural or built)</td>
</tr>
<tr>
<td>Relaxation and wellness</td>
<td>Romance</td>
</tr>
</tbody>
</table>
## Key Partners

## Key Activities

## Unique Value Proposition

## Customer Relationships

## Customer segments

---

### Key Resources

### Costs to be paid
(by the company, environment, society)

### SUSTAINABILITY CONSIDERATIONS

### Created Profit
(for the company, environment, society)

<table>
<thead>
<tr>
<th>Monetary (direct costs)</th>
<th>Non-monetary (risks)</th>
<th>Impact aspects</th>
<th>Monetary (revenues)</th>
<th>Non-monetary (other benefits)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Economic</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(Monetary Value for the company)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Environmental</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(Impact on the Environment)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Social</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(Impact on the Society)</td>
<td></td>
</tr>
</tbody>
</table>
## SELF-ASSESSMENT SHEET

### 1. Facilitation skills

<table>
<thead>
<tr>
<th>I am comfortable speaking in public and allow other people to express their opinions even if they don't reflect my own</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>I know how to keep an agenda and observe the times of a session</td>
<td></td>
</tr>
<tr>
<td>I ask open-ended questions that begin with Who, What, When, Why, or How</td>
<td></td>
</tr>
<tr>
<td>I share the importance of active listening and respecting the ideas of others, making sure that all group members have an opportunity to participate</td>
<td></td>
</tr>
<tr>
<td>I know how to ask questions as icebreakers and allow participants to share something about themselves in a non-threatening, enjoyable way</td>
<td></td>
</tr>
<tr>
<td>I can identify non-verbal signs that may indicate that someone wants to respond or ask a question</td>
<td></td>
</tr>
<tr>
<td>I recognize fears or disagreements among group members and I'm comfortable bringing them out into the open</td>
<td></td>
</tr>
<tr>
<td>I give positive reinforcement and feedback with a nod or word of praise</td>
<td></td>
</tr>
<tr>
<td>I use words that everyone is familiar with, avoiding technical or local terms</td>
<td></td>
</tr>
<tr>
<td>I bring the group back to a topic when it strays from the main issue</td>
<td></td>
</tr>
</tbody>
</table>

### 2. Familiarity with content

<table>
<thead>
<tr>
<th>I am familiar with all the definitions of sustainability, sustainable CBT, SDGs and concepts related to them</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am familiar with the notions of business development, stakeholders, investments, ventures and management-related topics</td>
<td></td>
</tr>
<tr>
<td>I can understand market data and adapt it into my plans and activities</td>
<td></td>
</tr>
<tr>
<td>I am aware of the latest regulations and policies supporting CBT product development</td>
<td></td>
</tr>
<tr>
<td>I know many stakeholders that can support with delivering a SUS-TOUR training</td>
<td></td>
</tr>
</tbody>
</table>

### 3. Organizing a training

<table>
<thead>
<tr>
<th>I know a location where the trainings can be provided</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is possible for me to get access to material for a training (flipcharts, markers…) without extra costs</td>
<td></td>
</tr>
<tr>
<td>I already know the people I would like to partake in my training</td>
<td></td>
</tr>
<tr>
<td>I have delivered other trainings before</td>
<td></td>
</tr>
<tr>
<td>I only need the outline for delivering my session</td>
<td></td>
</tr>
</tbody>
</table>