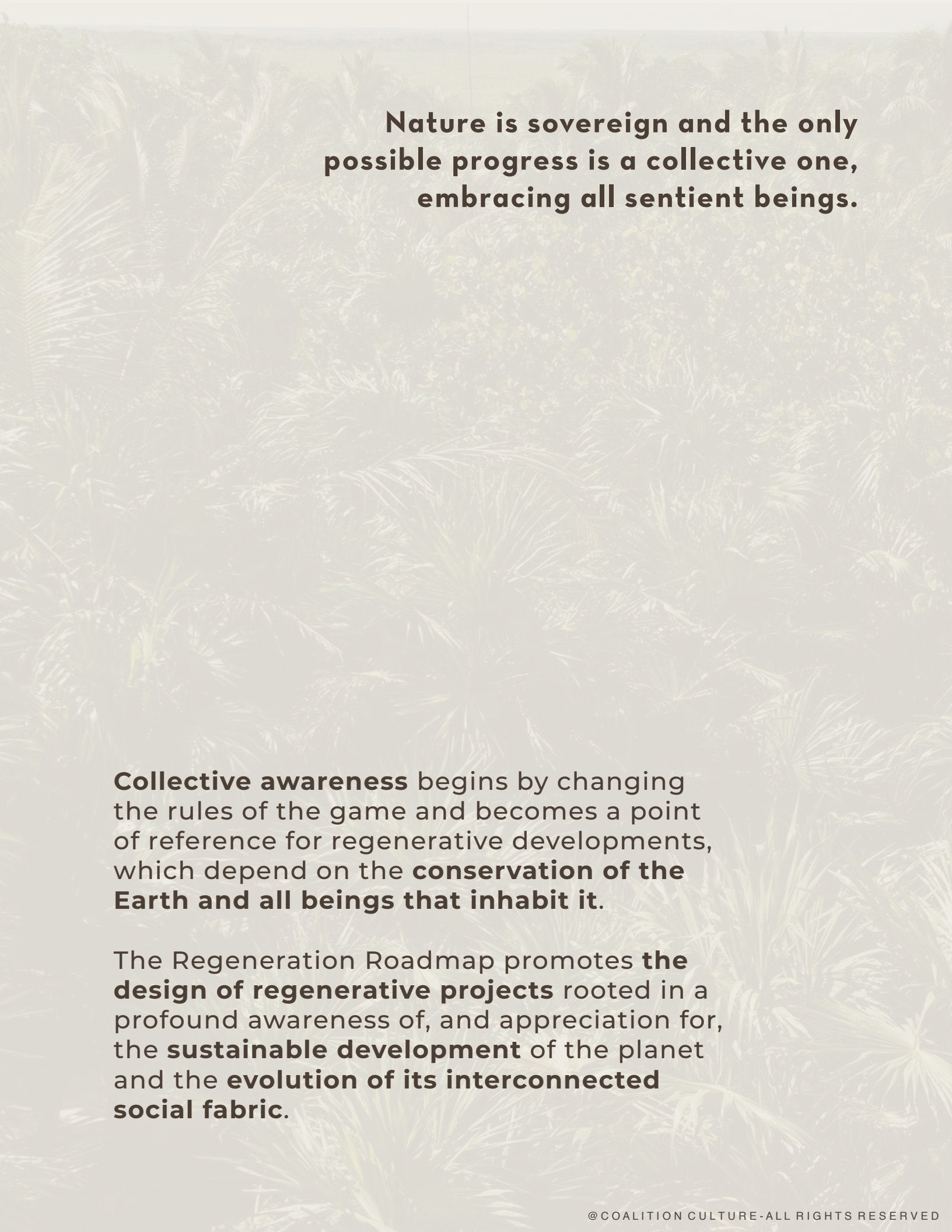# COALITION
C U L T U R E

REGENERATION
R O A D M A P

Facilitating roadmap tool to design and manage sustainable projects and relations with local communities, for the regeneration and conservation of flora, fauna and ancestral wisdom, so people and the environment can live in peace again.
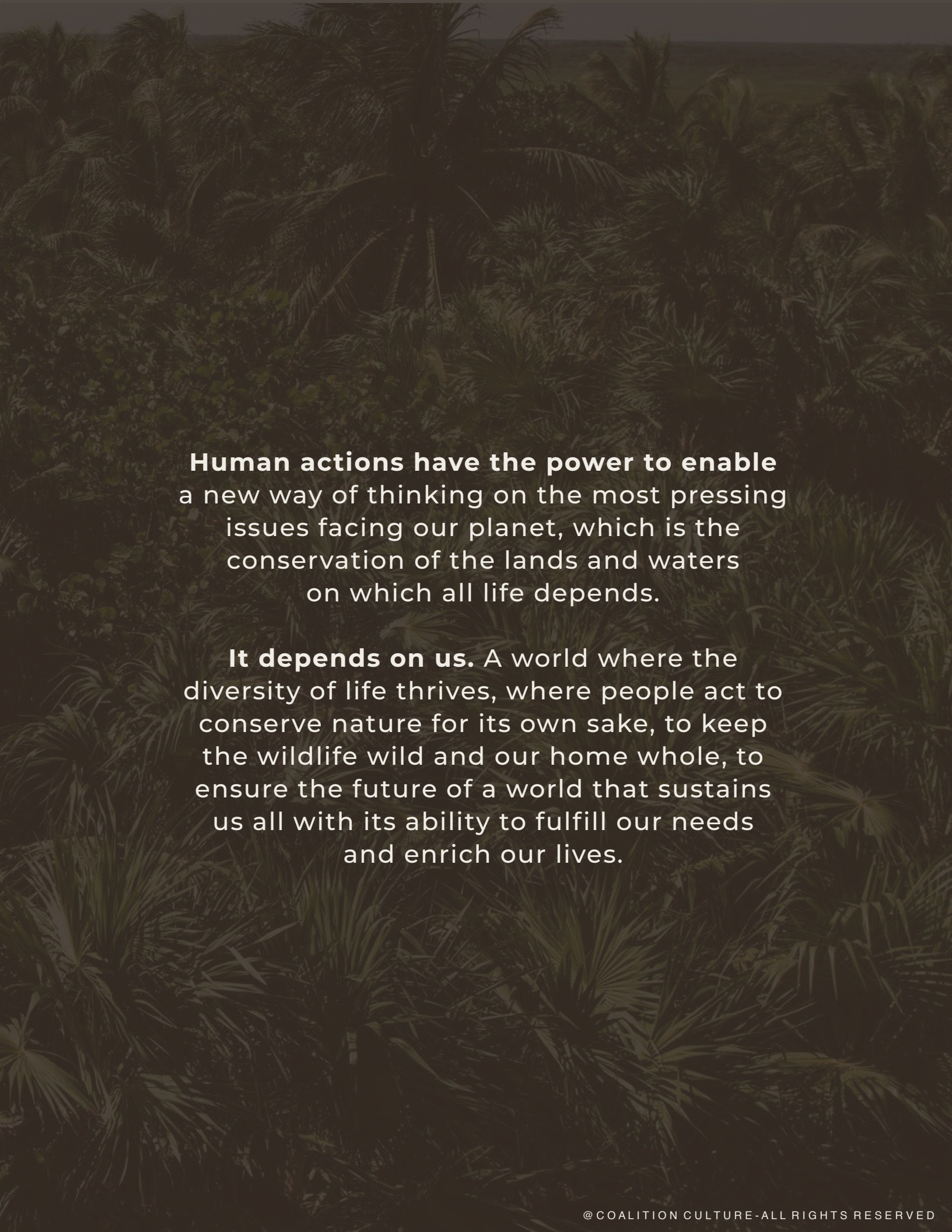
Nature is sovereign and the only possible progress is a collective one, embracing all sentient beings.

Collective awareness begins by changing the rules of the game and becomes a point of reference for regenerative developments, which depend on the **conservation of the Earth and all beings that inhabit it**.

The Regeneration Roadmap promotes **the design of regenerative projects** rooted in a profound awareness of, and appreciation for, the **sustainable development** of the planet and the **evolution of its interconnected social fabric**.

Human actions have the power to enable a new way of thinking on the most pressing issues facing our planet, which is the conservation of the lands and waters on which all life depends.

It depends on us. A world where the diversity of life thrives, where people act to conserve nature for its own sake, to keep the wildlife wild and our home whole, to ensure the future of a world that sustains us all with its ability to fulfill our needs and enrich our lives.

CONTENTS

THIS ROADMAP IS ROOTED IN
FOUR BASIC PRINCIPLES:

**2. Care of
the people**

**1. Care of
the land**

REGENERATION
ROADMAP

**4. Fair
distribution**

**3. Preserving
biodiversity**

1. All living beings coexist within connected and related environments. When the habitat works in the best interest of the organism, the ecosystem works at a greater level than the sum of its individual parts. Our role is to find solutions that benefit not only ouprojects, but the entire region and surroundings, collaborating with local businesses and associations to make the best possible use of existing resources.

2. The interest in keeping the rich cultural heritage and the wellbeing of the people alive becomes the central focus. Inspiring everyone to get involved and creating a positive change in the world through transformative experiences. When discovering a new place, we uncover a story that is bigger than ourselves, so understanding our ability to influence and exert positive change in our environment makes us feel empowered and inspired to bring those actions into your everyday life in any other part of the world.

3. Understanding the fragile balance between human occupation with the natural world makes the guarantee of a harmonic coexistence pivotal to the development of any regenerative project. Each location has specific demands to address, whether is wildlife, local waters, or endangered forests, regeneration should always be the seminal aspect of any endeavour.

4. Finding solutions that benefit not only our projects, but the entire region and surroundings, collaborating with local people, businesses and associations to make the best possible use of existing resources.

Community Partnerships

Each land exists in a place with an established community, with its heritage, culture and talents. **The first step will always be to partner with the locals.** Local communities are the heart of the solution to human-wildlife conflict and the erosion of sustainable ecology. The local community owns the land and property rights. By joining the land with the local populations can generate revenue with regenerative agriculture, as well as creating peripheral benefits such as educational, employment, and health programmes.

Science & Research

Scientific and research activities carried out on the conservancy projects serve several purposes. They form the basis for decision making processes, as well as for engaging local and international communities, and government and private sector actors.

The data serves to facilitate clear communication with stakeholders and win support for ongoing and planned initiatives. They also serve to highlight the positive impact on both the ecological and socio-economic situation as a result of conservancy activities.

To create a solid **regenerative development**, each project should be designed through these **building blocks**

Governance and Leadership

The regenerative community model is rooted in the relationship between the project and the local population. Its success is derived from the shared integrity and interest, combined with the business leadership of the project.

The creation of a mutually beneficial partnership with the community will be developed with integrity, high ethical standards, long-term thinking, flexibility and humility to engage honestly and create long-term profitability as well as a sustainable relationship.

Stakeholder Collaboration

A great deal of individuals are involved in a regeneration project, from member residents to national governments, all critical to its success. Particularly key are those involved in community outreach and advocacy, who facilitate information exchange and awareness to create a relationship of trust and understanding. Local and national governments, who develop a network of collaboration with the communities and create guidelines for wildlife management are also important stakeholders, but the most important elements are all sectors of the local community, who must be involved in and receive the benefit of the projects.

REGENERATION ROADMAP

The Regeneration Roadmap is a **facilitating tool that connects project designers and managers with the communities,** aiming to foster a mutual understanding and guidelines to work collaboratively to conserve their cultural and natural environments and co-create innovative projects that preserve their original wisdom and promote sustainable development.

This hands-on guide is designed with a **bottom up approach to ensure that communities are consulted, engaged and empowered** throughout the whole planning process. It serves as an intermediary support that gives voice to the communities, and takes into account their views and aspirations.

The Roadmap **consists of six phases that follow set objectives to guide the design and implementation of our projects.** Each phase is strategically designed to ensure participatory action research providing guided steps and specific tools to work hand-in-hand with the communities. It is designed based on existing tools and frameworks including: seven capital assessment, community asset mapping, SWOT analysis, influence/interest grid for stakeholder prioritization, value chain analysis and budget estimate sheets.

It is an **iterative process** that requires the project designer and managers to constantly refine each phase, using a reflective loop methodology: **plan, do, collect and reflect**.

How can it be used?

The six phases can be used in many different ways. They can be used to:

- Identify the challenges and opportunities in project development with local communities, which need to be considered in project design and planning.
- Identify the assets and needs of local communities and their ecosystem, and a way to optimize them.
- Engage and involve local communities throughout the process.
- Build and sustain a value-based relationship with communities.
- Develop projects and implementation plans.

What are the benefits?

The primary advantage of this roadmap is to offer project designers and managers a sustainable way to approach project design and to achieve positive results for all stakeholders - communities and the project's partners. The other benefits are:

- Higher quality projects and products.
- Maximize and manage the projects' impacts
- Increase awareness and understanding of natural and cultural heritage.
- Maintain and sustain the long-term growth of the projects and the communities.

Guiding frameworks

The design of the roadmap integrates the following frameworks:

This tool is based on the *Roadmap for Sustainable Tourism Development with Indigenous Communities* created by Coalition Culture's founder Maria Camila Pava and a team of design managers from Pratt Institute in New York. The tool is published in **Tourism for Sustainable Development Goals (SDGs)** - platform developed by the United Nations World Tourism Organization (UNWTO) - link in References.

Triple Bottom Line by Design and Culture (TBLD+C)

Triple Bottom Line is a framework that incorporates four dimensions of performance: social, environmental, cultural, and financial. The "by Design" aspect of the term refers to the active intention of the entrepreneur in establishing all policies, processes, and products around the four principles (McBride, 2011). In the development of the roadmap, the four dimensions have been incorporated to:
• Optimize sustainable development projects to benefit local communities socially, economically, environmentally and culturally.
• Provide project designers and managers with strategies and tools for the development of sustainable projects that focus on these four dimensions.
• Stress the value of culture as a form of social equity, environment responsibility, economic health, and cultural vitality.

Sustainable Development concepts by the United Nations (UN)

Sustainable development concepts are applicable to all forms of projects in all types of industries and communities: the environmental, economic, and socio-cultural aspects of project development. A balance must be established between these three dimensions to guarantee its long-term sustainability (UNWTO, n.d.). In the development of the roadmap, the concepts have been incorporated to:

• Make optimal use of environmental resources, a key element in development, to maintain essential ecological processes and help to conserve biodiversity.
• Respect the socio-cultural authenticity and traditional values of host communities, conserve their built and living cultural heritage, and contribute to intercultural understanding and tolerance.
• Ensure viable and long-term economic operations. Provide fairly distributed and socio-economic benefits to all stakeholders including stable employment, income-earning opportunities, social services to host communities, and contributing to poverty alleviation.

Participatory Action Research

Participatory action research is an approach to research communities. It emphasizes participation and action and enlists those who are most affected by a community issue. The issue will be analyzed with the aim to devise strategies (Community Tool Box, n.d.). The research is done collaboratively by professionals and community members, so that research results both come from and go directly back to the people who need them the most and can make the best use of them. In the development of the roadmap, the participatory action research has been incorporated to:

• Perform the actions through a reflective cycle, whereby entrepreneurs and local communities collect and analyze data, then determine what action should follow to achieve positive outcomes.
• Empower stakeholders who are involved in sustainable development projects by including and integrating their views, and allowing them to have control over their lives.

REGENERATION ROADMAP

A journey to design regenerative projects with local communities.

Covering a wide variety of ecological networks and community cultures, there is an overall process that, taking as examples case studies published on existing regeneration projects and conservancies, distills the basis of the commencement process:

- **Identify** critical and endangered ecology areas being eroded.
- **Engage with land** owning communities
- **Collect data** on land use changes and cultural dynamics to guide development of terms and conditions.
- Engage in **partnerships with local communities**, liaising with relevant local and national governments.
- Guarantee to establish **nature and community projects**, generating revenue to cover the cost of the regeneration project and running costs.
- Implement monitoring and study projects to establish data on the **ecosystem impacts and habitat recovery** of the ecology impacted by the regenerative initiative.
- Create **additional revenue streams** through productivity projects, fundraising events and donations - a range of benefits to the local community, using the proceeds to improve and expand the regeneration, as well as provide benefits and revenue to the local community.

A tender and ambitious project that deepens its relation with nature while looking for modern-day solutions, **the Regeneration Rodmap intends to enable the survival of a self-regulating resilient organism**, a bulletproof ecosystem where humans are together with all other elements, going beyond theory and providing a range of practical solutions that we can use in each area of our lives.

With a powerful commitment, Coalition Culture makes its entrance in the regeneration world, hoping our grain of sand can be replicated, multiplied and absorbed by as many people as possible.

Let the regeneration begin!

1 Preliminary Project Assessment

2 Participatory Community Evaluation

3 Define Collaboration

4 Formal Partnership

5 Action Plan & Procedure

6 Monitor & Evaluate

REGENERATE! CONSERVE! SUSTAIN!

What can be designed with this roadmap?

● **Internal Projects**

Project Design and Management
New land / community development
Community services, products and experiences
Production
Infrastructure, Decor and Setup
Operations
Managament, Staff and Service

● **External Projects**

Project Run
Community-based initiatives
Partners
Strategic alliances
Supported
Collaborations and sponsorships

Phase 1

Preliminary Project Assessment

STEP 1   Vision, Mission, Values, Goals, and Objectives (VMVGO)

Establish Criteria for The Participation of a Community

Internal Project Assessment

STEP 2   External Project Assessment

Preliminary Community Assessment

Tips for Approaching an Indigenous Community

✳ Objectives of this phase:

- Define vision, mission, values, goals, and objectives.
- Establish criteria for the participation of indigenous communities.
- Evaluate your internal resources and abilities.
- Understand the external opportunities and threats.
- Understand the context of local communities.

The Importance of Preliminary Project Assessment

The purpose of the preliminary project assessment phase is to help you define and determine what you would like to achieve and to give you a "snapshot" view of your project. A preliminary project assessment is a simplified description of a project that includes the vision, mission, values, goals and objectives (VMVGO) of your project, internal assessment, preliminary assessment, and community assessment. This phase will provide you with a high level filtering process in analyzing the viability of your project.

Vision, Mission, Values, Goals, and Objectives (VMVGO)

Developing a regenerative project with local communities is challenging. The purposes of defining your VMVGO are to help your team and stakeholders clearly understand what your objectives are and to have them on board with the decision-making process, as well as keeping them engaged and motivated in the development process. VMVGO helps you set and achieve short-term goals, while keeping sight of your long-term vision. Be aware that your VMVGO may need modification during the project development process of the roadmap. For example, VMVGO might need to align with the VMVGO of the partnering communities.

The VMVGO is an efficient planning process to help you define your vision and develop practical ways to achieve goals.

VISION — Aspiration of where you see your project in the future. Your vision communicates what you believe and what you want to achieve in the future.

MISSION — A general statement of how you will achieve your vision.

VALUE — Values represent the core priorities in your team's culture, including what drives team members' priorities and how they truly act in the project.

GOAL — The key efforts that need to be accomplished to achieve the mission.

OBJECTIVE — The smaller steps, activities, and milestones with a specific timeline that must be completed to achieve a goal.

Establish Criteria for The Participation of a Community

Establish a set of criteria for selecting a community to collaborate with based on your project VMVGO. It is important to determine the alignment between a community and the project. Following are examples of criteria to consider:

- community that has an interest in participating in a development.
- community has a rich cultural heritage.
- community has attractive assets for regenerative community products.
- community is open to developing an inclusive partnership.
- community is seeking social equity for its people.
- community is seeking for opportunities to improve the quality of their life.

✳ When envisioning your regenerative project, consider this:

Regeneration goes beyond sustainability and mitigating harm, to actively restoring and nurturing, creating conditions where ecosystems, economies and people can flourish.

The following are concepts suggested to consider when envisioning your regenerative project:
- Stewardship versus ownership: shared ownership
- Circular economy, leadership, lifecycles: models that flow in the same way as nature
- Regeneration from soil to soul

Regeneration pillars

Planet. Restoring and enriching ecosystems, replenishing natural resources, and ensuring that natural systems can thrive for future generations. Thinking regeneratively means thinking for nature by thinking as nature.

People. People must be at the heart of the regeneration effort. We can't begin to tackle climate crisis without also working to alleviate inequalities, poverty and racial injustice.

Prosperity. Deliver benefits beyond the borders of their own business, bringing prosperity to communities and wider society, and securing it for future generations.

Source: Regeneration Rising. Wunderman Thompson.

Internal Project Assessment

You will need to conduct an internal assessment of your project. Examine the project's strengths and weaknesses. Consider where your project is now and where it needs to be in five or ten years, what resources and abilities are needed to reach the desired objectives. You can use the following questions for an internal scanning of the project.

WHY?

- Why is the problem/opportunity addressed by your project important?
- What is the opportunity you see?
- What is your competitive advantage/ value proposition?

WHAT?

- What is your project idea?
- What is the work that will be performed in the project?
- What are the major products/ services?
- What are the resources needed for your project (e.g.financial, human and physical resources)?

WHO?

- Who will be involved and what will be their responsibilities be within the project?
- How will they be organized?
- What kind of skills, degree or training is needed on the team (e.g. B.A. in ecovillage management, certified regenerative programs, etc.)?

WHEN?

- What is the project timeline and when will the milestones need to be completed?
- What is your forecasted implementation plan?

External Project Assessment

The purpose of doing an external assessment is to help you define the parameters and determine an approach to be used by the project team to deliver the intended project management scope of the project. The preliminary assessment is a process that systematically analyzes relevant data to identify external opportunities and threats.

An external assessment allows you to become familiar with the current landscape in the local context of the local region of the project. A suggested approach is to research and collect information from multiple sources to have an understanding of factors and trends that might impact the project development. These factors can be political, environmental, social/cultural, technological, economic, and legal/regulatory trends. Gather information about how the tourism industry operates, including information about the economy, government, laws and demographic factors, such as population size and distribution. Understand the information and ask thoughtful questions before a decision is made in the development of the project. Next, you should focus on your potential customers, target market, competitors. Examine the research for trends, opportunities, and threats that might impact your project.

Preliminary Community Assessment

The purpose of doing a preliminary community assessment is to help identify the local communities that best fit the interest and descriotion of the project. It provides an overview of the current standing of the community; then it helps to develop an understanding of the people in a geographical area or a particular community of interest.

The preliminary community assessment can assist to develop a community engagement strategy and make the first approach to a community more valuable, as the strategy is tailored to the needs and characteristics of the community. Performing an accurate assessment of the community prior to the first engagement ensures an overall understanding of the community and prevents from misconceptions arising.

To do the assessment, the following are suggestions on questions to consider to have a basic understanding of the selected community:

- **Infrastructure (carrying capacity):** Are there any health centers, hotel, restaurants, public spaces, water and waste management built in the community?
- **Environment:** How is the natural environment in the community? What are the natural assets found within the community?
- **Cultural activities and resources:** What are the traditions, festivals, and other cultural events in the community?
- **Size:** what is the size of the community/region/city?
- **Accessibility:** How far is it from the city? Is there highway and roads to the community?

Working with indigenous communities?

✳ Tips for Approaching an Indigenous Community

Make an initial contact with the selected communities after the communities have been chosen to collaborate with and an understanding of the context has been achieved. The following questions help to plan an approach to the selected communities for the first time:

• Who are the main point of contacts within the community?
• What are the local organizations or community organizers that can support in building a relationship with the community?
• What would be the interest and need of the community?

We suggest that the first approach to the community should be with the assistance of an intermediary group. Intermediaries play the facilitative role in encouraging community participation.

The following are examples on how the first approach can take place:

• Approach to create trust and bonding.
• Attend community meetings and events.
• Become involved in community committees.
• Show an interest in developing a project with the community.

Before going to the community, have your elevator pitch, and your vision and mission statements prepared of the project to share with community members. Also, have a stakeholder list in mind and develop a strategy to share project with. The interested parties in the community could be a spiritual leader, villagers, community leader, asset or resource owner, as you have identified in the community assessment. It is important to consider who might be concerned about and responsible for development issues relating to the community.

Involving stakeholders from the start gives them an opportunity to learn firsthand about the project's concepts and enables communities to voice their priorities and concerns. Also, the benefit of involving the stakeholders throughout the process of planning and implementing increases chances of long-term success for the project.

Participatory Community Evaluation

STEP 1   **Participatory Asset Mapping**

Seven Capitals Assessment

STEP 2   **Create a Value Chain for The Project**

SWOT Analysis

Evaluate and Summarize Key Findings

STEP 3   **Stakeholder Analysis**

STEP 4   **Stakeholder Engagement**

Preparation and Communication

Objectives of this phase:

- Collaborate with local community/communities to identify the existing assets and structure in the community.
- Analyze how to capitalize the assets by creating a value chain with the inclusion of the community in the project.
- Evaluate and summarize the community's strength, weakness, opportunity, and threats to have a comprehensive understanding.
- Determine where and what type of community assets and needs to target in the project.
- Identify project's key stakeholders.
- Prepare a stakeholder engagement strategy.

The Importance of Engaging the Local Community

Early, respectful, transparent and consistent communication with local communities are the foundation of a great successful partnership. For the project to be fully understood and considered by a community, it is necessary to engage the community in the early stage of the project development. Without the genuine engagement of local people, it will be difficult to meet the vision of the project and to make the project fully sustainable in the long term. Community engagement requires a relationship built on trust and integrity. High level of community engagement creates greater value for the project than simply having a consultation with the community.

The most important thing to keep in mind when engaging with local communities is the emphasis on values that resonate with local people's belief systems. Each local community has cultural values that differ from others, the knowledge and the beliefs they inherited from their ancestors, religion; family traditions. These values are an important aspect of their existence. It is important to approach a community with an understanding of the historical, cultural and social complexity of the communities. Approach community engagement with a genuine attempt to share power in relationships that foster mutual trust. Being respectful of differing values and priorities and acknowledging the strong family and cultural ties within communities are the ways to engage a community successfully.

Be aware that from phase two and on, a participatory action research cycle approach will be embraced - Entrepreneurs and the local communities work as partners to plan, act, analyze, reflect, and make modifications. The whole project development process should be a reflective loop that allows communities to have a robust and equal voice in the development process.

The five core principles for creating a successful community engagement are:

Visioning

Before doing the participatory asset mapping with a community, you can use the framework 'Appreciative Inquiry' to engage community members in self-determined change. The procedure helps a community to identify where they are now and where they want to be in the future.
(See figure 1: Appreciative Inquiry)

DISCOVERY
A grounded exploration of the 'best of what is'

01

DREAM
Visioning and debate collaboratively. articulating 'what might be'

02

DESTINY
Collectively experimenting with 'what can be'

04

03

DESIGN
Working together to develop 'what might be'

1. Integrity:
when there is openness and honesty about the scope and purpose of engagement.

2. Inclusion:
when there is an opportunity for a diverse range of values and perspectives to be freely and fairly expressed and heard.

3. Deliberation:
when there is sufficient and credible information for dialogue, choice, and decisions, and when there is space to weigh options, develop common understandings and to appreciate respective roles and responsibilities.

4. Influence:
when communities have input in deciding how they want to participate when policies and services reflect their involvement and when the community's impact is apparent.

5. Culture:
when local culture shapes the engagement process.

Appreciative Inquiry for the Local Community:

- **Describe the community when it is operating at its best?**
- **Envision what the community could be?**
- **Describe what you think the community should be?**
- **Describe what the community will be in the future and how to make it happen?**

Figure 1: Adapted from "The 4D Cycle". Sharp, C., Dewar, B. & Barrie, K., 2016. Copyright 2016 by The Institute for Research and Innovation in Social Services.

Participatory Asset Mapping

The purpose of doing a participatory asset mapping (including Community Capital Mapping and Seven Capitals Assessment) is to support strategic project planning efforts by building on existing community strengths. The participatory asset mapping is a collaborative process used to work with community members. It can build community cohesion and empowerment by bringing community members together to generate a shared awareness and understanding of community assets. This step could be used as a method of facilitating community involvement in research, decision-making, and action. Through the participatory asset mapping, community assets can be easy to identify, locate, and map, especially when community residents are the sources of the information.

A Participatory Asset mapping event or a workshop that brings together potential stakeholders in a community to identify and discuss the assets in their community is a good strategy. The discussion may begin with community members defining the term "asset" or confirming and enhancing a proposed definition. Using their definition and through facilitated dialogue, it allows them to identify the assets/resources that fit this description on a map, in the process, they can find out the assets they may not have been familiar with or barriers to assess them.

Beside capitals and assets, also include information about the socio-economical and demographic factors within a community, such as

- **Livelihood:** To understand how well is the current situation working to improve their livelihood and quality of life, It is important to know what's the community's primary activities (e.g., fishing, agriculture, crafting, manufacturing, forestry), employment, and average household income.
- **Household Activities:** Identify family structure and roles by knowing what are the household activities and who are supporting it.
- **Community Structure:** It includes information on housing units, population makeup, age structure, and ethnicity.

Seven Capitals Assessment

The purpose of starting from a seven capitals assessment is to help in assessing the existing assets and structure in the community. The seven capitals assessment includes seven types of capitals which are: Cultural, Natural, Political, Built, Human, Economic, Social. It will lead entrepreneurs and community to have a discussion around community's capitals. (See figure 2: Community Capitals)

Use a map to identify and locate community capitals. Mapping out the community capitals allows you and community members to perform spatial analysis of capitals to identify linkages, gaps, and packages. This asset map becomes a visual representation of findings, and it identifies the areas for further work or improvement *(see workbook for the tool 1, Community Capital Mapping Chart).*

Once you and community members have identified and mapped the capitals, you can have further discussion with the community about which capital requires improvement, expansion, or build on. The discussion can help you and community members manage the resources and plan the development of the project and the community. The seven types of capitals include *(see workbook for the tool 2, Seven Capital Assessment Table):*

Cultural Capital:
This includes ethnic festivals, multi-lingual population, traditions, heritage, or a strong work ethic. Cultural capital influences what voices are heard and listened to, which voices have influence in what areas, and how creativity, innovation, and influence emerge and are nurtured.

Social Capital:
This reflects the connections among people and organizations or the social glue that makes things happen.

Economic Capital:
This includes the financial resources available to invest in community capacity building, underwrite businesses development, support civic and social entrepreneurship, and accumulate wealth for future community development.

Human Capital:
This includes the skills and abilities of residents as well as the capacity to access outside resources and knowledge to increase understanding and to identify promising practices (education, health, skills, and youth).

Natural Capital:
Those assets that abide in a location, including resources, amenities and natural beauty.

Political Capital:
The ability to influence standards, rules, regulations and their enforcement. It reflects access to power and power brokers, such as access to a local office of a member of Congress, access to local, county, state, or tribal government officials, or leverage with a regional company.

Built Capital:
The infrastructure that supports the community, such as telecommunications, industrial parks, main streets, water and sewer systems, roads, etc. Built capital is often a focus of community development efforts.

If the community has existing tourism products such as hotels, restaurants, or attraction sites, you can consider using the tourism asset inventory tool in the workbook to list them out. *(see workbook for the tool 3, Tourism Asset Inventory Table).*

Figure 2: Adapted from "Community Capitals". Iowa State University, n.d. Copyright n.d. by Departmentof Sociology Iowa State University

Phase 2: Step 2:

Create a Value Chain for The Project

The purpose of establishing a value chain is to help entrepreneurs and the community to visualize the key components of the project's process and logistics, and discover how the community can be involved in each phase. The value chain can provide a sound basis for establishing a regenerative land development. It provides a useful framework to identify the series of the interactions with the community members and multi-stakeholders collaboration. Ultimately you will be able to discover more in-depth what you can offer to the community and what the community can provide to the project.

A value chain represents a high-level model that describes the process of key activities essential for the project. This tool is often used to maximize efficiency in each phase and add value to it. An example is provided below, but please note that the value chain may change according to the particular project's needs. Below is the example of a value chain *(see workbook for the tool 4, **Value Chain Table**):*

Below is an example of a Tourism Development value chain

	Travel Organization & Booking	Transportation	Accommodation	Food & Beverage	Tourism Assets in Destination (Experience)	Transport from Site	Leisure Excursion Tours	Traveler Satisfaction
Community	Online Customer Service	On Bus Tour Guide	Owner. Provider and Manager	Owner. Provider and Manager	On Site Tour Guide, Manager, and Owner	Operator and Manager	Tour Developer, Manager and Operator	Provider and Resource Manager
Entrepreneur	Online Reservation Manager	Facilitator	Facilitator	Facilitator and Shareholder	Facilitator	Facilitator	Tour Facilitator and Developer	Data Collection and Evaluation
Additional Resources	Online Advertising & Promotion Agencies	Tourism Agencies	Interior Designer and Constructor		Promotion by Local Government and Agencies	Tourism Agencies	Tourism Agencies	

SWOT Analysis

The previous steps will result in a lot of data and information about community assets. A SWOT analysis is recommended to evaluate the situation in the community and consider a key strength, weakness, threat or opportunity of the community that lead to project development strategy. Also, it assists Entrepreneurs and the community to determine where and what type of community assets to include in the project *(see workbook for the tool 5, **SWOT Analysis Table**).*

The SWOT analysis examines the external factors for the project at that point in time. It is important to not underestimate the emerging nature of the world, because the external factors change over time.

Evaluate and Summarize Key Findings

The purpose of this step is to summarize the data and have a general view of each capital and asset; it also helps to take into consideration everything that could potentially impact the success of the project by highlighting the key findings from the assessment.

Once the strengths, weaknesses, opportunities and threats of the community have been identified, it's important to determine how to leverage and capitalize the assets of the community to close the gaps and fulfill the needs of the community and develop the project. In this step, it might be necessary to revisit and refine the VMVGO and Community Assessment from earlier phases to align the project with the needs of the community. Based on this analysis, questions to consider may include:

- What asset and resources can add uniqueness and provide a differentiation to the project?
- Which asset required building, improving or expanding?
- What do you need to build, improve or broaden the asset?
- What can the project do to capitalize the assets?
- How can the project help the community to develop and prosper?
- What's the possible interaction or relationship to establish with the community?
- What are the threats and challenges that the project might encounter in its development ?

Stakeholder Analysis

The purpose of performing a stakeholder analysis is to identify key people, groups or organizations (in or outside of the local community) that have a vested interest in the project. How their needs may impact the project, and the contributions they will make to the project. The process of the stakeholder analysis identifies the influence, interest, importance, and power of different stakeholders, to better manage the relationship and to make thoughtful strategies and decisions.

After all the stakeholders have been identified, it is important to determine how involved each stakeholder should be in the development process of the project. The purpose of the tool influence/interest grid for stakeholder prioritization is to aid in classifying the influence stakeholders have over the project and determine their level of interest and suitable level of engagement in the project. The tool also helps to consider which stakeholder needs to be informed, consulted, involved, or collaborated/empowered over what topics, and for what purpose. The stakeholder analysis is an ongoing process that supports in identifying new stakeholders or reevaluating the stakeholders during the project development. (See figure 3: Stakeholder Analysis Tool).

An example of SWOT Analysis:

	POSITIVE	NEGATIVE
INTERNAL	**STRENGTH** • Beautiful natural resources • Agriculture based community • Close to a highway exit • One hour away from the airport • Well preserved culture and traditions	**WEAKNESS** • No hotels or hostels in the community • The waste management in the community is underdeveloped • The community is currently not involved in the tourism industry, so they don't have the knowledge and skills of tourism
EXTERNAL	**OPPORTUNITY** • Travelers are seeking new and personalized experiences • Travelers choose destinations based on culture and special offers • Culinary tourism is a new tourism trend • Tourism development has strong government support in the region	**THREAT** • Regulations benefit foreign direct investment over local investment • Political corruption is frequent and mainstream • The community is located in a dangerous neighborhood • Potential trade agreement and tariff changes

Tool: **Influence/Interest Grid for Stakeholder Prioritization**

Instruction: • **Identify the stakeholders.**
• **Evaluate the stakeholders by using the stakeholder analysis tool**
• **Prioritize the stakeholders according to the project need.**

HIGH

LEVEL OF INFLUENCE

INVOLVE / CONSULT

• Ensure needs and concerns are understood and considered
• Obtain feedback on alternatives and/or decisions

COLLABORATE / EMPOWER

• Partner with on each aspect of the decision
• Potential decision making authority
• Co-design/Co-production

INFORM

• Provide balanced and objective information
• Limited monitoring and management

CONSULT

• Obtain feedback on alternatives and/or decisions

LEVEL OF INTEREST

LOW   **HIGH**

Figure 3: Adapted from "Stakeholder Analysis". IInnovation for Social Change, 2014 Copyright 2014 by Innovation for Social Change.

LEVEL OF ENGAGEMENT
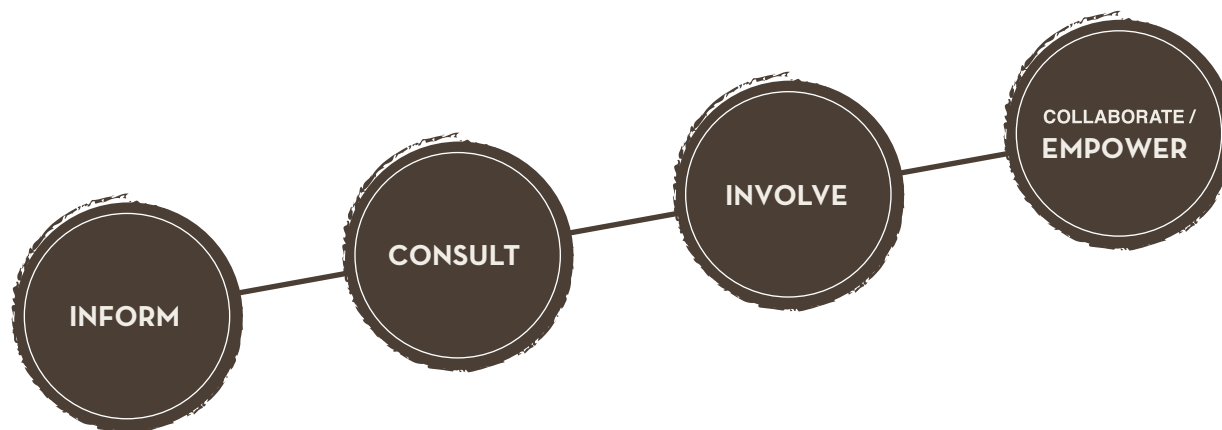
Figure 4: Level of Engagement

Below is the explanation for each level of engagement. Different levels of engagement might be appropriate for different purposes. You can determine what level of engagement is needed to achieve your outputs or outcomes. (See figure 4: Level of Engagement)

Inform:
This is essentially one-way "communication." The methods and tools for this level would be announcements, press releases, position statements, and prepared statements. This level of engagement could be used when there is no avenue for alternative forms of action (e.g., legal boundaries), or when you are reporting decisions or a course of action that doesn't affect others. Also, it is used at the start of a process, with the promise of more opportunity to participate later.

Consult:
The goal of the consultation is to benefit from stakeholders' greater knowledge of local conditions and opinions. This level of engagement target at those most likely to be affected by the project, so the consultation should happen early enough to scope key issues and have an effect on the project decisions to which they relate. It is a two-way engagement, so both sides have the opportunity to exchange views and information, to listen, and to have their issues addressed. A proper consultation process should be culturally appropriate and gender-inclusive through awareness that men and women often have differing views and needs. Consultation is appropriate when you have

definite plans for a project, and there appears to be a limited range of options for change or when local community interests can understand and relate to these options.

Involve:
In this level of engagement, stakeholders are authentically engaged in generating opportunities and carrying out actions that emerge from their input, but their participation falls short of sharing formal decisionmaking authority. Involvement is appropriate when you need to tap into stakeholder skills and experience to carry out plans, or when stakeholders have a strong desire to participate in the proposed work.

Collaborate / Empower:
In this level of engagement, you will partner with stakeholders in decision-making regarding the development of goals, the identification of preferred solutions, and shared implementation. It is a longer, more complicated process, which requires more preparation and support for stakeholder involvement. To have a successful collaboration, you will need to ensure that stakeholders are equipped to actively contribute to the achievement of outcomes in collaboration with others. You might also need to identify and reach out to those who haven't been involved in this issue to date, but possess key information and experience crucial to the outcome, including hard to reach or marginalized groups that may require some additional strategizing and outreach. Collaboration and empowerment are essential for stakeholders to "own" the development and implementation processes.

Phase 2: Step 4:

Stakeholder Engagement

Stakeholder engagement is used to strengthen the relationship with stakeholders. Stakeholder engagement enables a proactive cultivation of relationships that can serve as "capital" during challenging times. The stakeholder engagement will be an ongoing process of maximizing the involvement of internal and external stakeholders to help craft, implement, and adapt strategies to achieve targeted outcomes.

Phase 2: Step 4.1:

Preparation and Communication

Preparation is a key to successful stakeholder engagement. The purpose of preparation is to plan a sensible strategy to increase the possibility of successful engagement with stakeholders. After you have determined what level of engagement (inform, consult, involve, and collaborate/ empower) is required (refer to the stakeholder prioritization tool), you will need to choose a method of engagement that is suitable for the stakeholder. For example, some methods for engaging might include planning a workshop, presentation, forum, or visioning exercise. Due to the different norms and expectations of the community or group, you will need to take into account different cultural and communication styles.

Develop an engagement strategy:

What is the purpose?

- Identify why the engagement is important for the development of the project.
- Identify what outputs or outcomes you want to achieve with the engagement of the stakeholder.

Who to engage?

- Create a list of relevant stakeholders that are essential for the development of the project.
- Consider who needs to be informed, consulted, involved, and collaborated/empowered over what topics, and for what purpose?
- Map it with stakeholder prioritization tool to determine a suitable level of engagement.

How to engage?

- Choose a suitable method of engagement (workshop, presentation, forum, visioning exercise).
- Plan engagement logistics (e.g., timing, resourcing, and responsibilities).
- Consider the norms and expectations of the community or group.
- Take into account different cultural and communication style.
- Determine the resources you need to conduct the engagement process (e.g., translator, intermediary, powerpoint).
- Determine key messages to communicate.
- Consider stakeholder engagement risks.

Remember to document the process and results of engagement to keep track of who has been informed/consulted/involved/ collaborated and the key issues raised. Documentation will help to effectively manage the stakeholder engagement process.

Once the engagement strategy has been created, the disclose of the project proposal and information is the first step of the communication. Consider the following list for disclosing project proposal:

- Give people the information they need to participate in an informed manner.
- Engage in open discussions of concerns regarding any immediate concerns about tourism development.
- Allow communities to cite key issues that they think are important.
- Leave sufficient time between the provision of information about the benefits and disadvantages of the project and the start of consultations.

Phase 3

Define Collaboration

STEP 1   **Reevaluate the Project**

STEP 2   **Create Logic Model**

STEP 3   **Develop Project Strategies**

STEP 4   **Set Project Key Performance Indicators for the Project**

* Objectives of this phase:

- Reevaluate the community and project goals, objectives and values and identify common ground or potential areas of conflict.
- Create a logic model to define the scope of work and measure it.
- Develop project strategies.
- Set key performance indicators (KPIs) for the project.

Reevaluate the Project

The purpose of this step is to establish common ground or identify potential areas of conflict between the community and project. Defining a common ground and aligning the project goals, objectives and values with the community throughout in the process is important in creating the project strategy and developing a value-based relationship. Before setting the project strategy, think about how the project could be socially and economically inclusive so that indigenous communities can share in the profits. Besides being sustainable in economic growth, it's important to think about:

- How can the project capitalize local resources efficiently and at the same time protect the environment, preserve cultural values and heritage?
- How can the project create mutual understanding between community members and different groups of stakeholders?
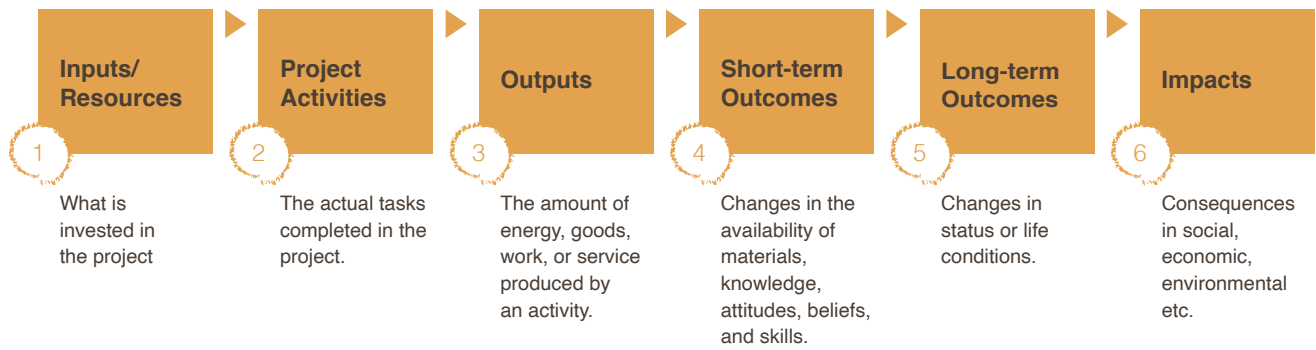- How can the project provide the community peace and security?

Create Logic Model

The purpose of creating a logic model is to define the work and to measure it. Performance measures can be drawn from any of the steps. One of the most important aspects of creating the logic model is to measure final outcomes or results because it is possible to waste time and money (inputs), or produce outputs without achieving desired outcomes. Creating a logic model in a development project involving groups of people brings the power of consensus. It also allows group examination of values and beliefs about change processes and project results.

A logic model should have clear outcomes and concrete steps for solving project problems. It shows how the project goes from Point A *(project inputs)* to Point Z *(project impacts)*.

A Logic Model include:

Inputs/ Resources		Project Activities		Outputs		Short-term Outcomes		Long-term Outcomes		Impacts
1	▶	2	▶	3	▶	4	▶	5	▶	6
What is invested in the project		The actual tasks completed in the project.		The amount of energy, goods, work, or service produced by an activity.		Changes in the availability of materials, knowledge, attitudes, beliefs, and skills.		Changes in status or life conditions.		Consequences in social, economic, environmental etc.

A logic model is also excellent for creating a brief summary of monitoring and evaluation plan. Please see the example of a logic model below *(see Workbook for the tool 6, **Logic Model Table**).*

An Example of Logic Model

Inputs/ Resources	Project Activities	Outputs	Short-term Outcomes	Long-term Outcomes	Impacts
SOCIAL CAPITAL					
Marketing, Promotion, Advertising Partnership	Create public awareness campaign to inform residents about regeneration and how to participate.	(1) Number of news, articles and public forums (2) Number of participants who have increased understanding of regeneration impacts (3) Community plans for addressing impacs of development	(1) Increase awareness among consciouss travelers (2) Increase a reputation of the destination (3) Engage visitors with local people	(1) Minimize negative social impacts on host community from the development (2) Host community well-beings	Economic Growth

Develop Project Strategies

The purpose of developing the project strategies is to design a plan of actions or activities to achieve the project goals. Strategies explain how the activities initiative will reach its objectives. The strategies include people from all of the different parts, or sectors, of the community. These strategies range from the broad, which encompass people and resources from many different parts of the community or to very specific, which aim at carefully defined areas.

Below are suggestions for creating an authentic project:

Be specific
Strategies should supply sufficient detail so that the community and other stakeholders could take over and run the program using only the narrative.

Be reasonable
As with the objectives, it is important to be reasonable and realistic in what activities can be accomplished with the given time and available resources.

Be authentic
Cluster the project's strategy around themes, such as community capacity building, cultural programming, environmental preservation, etc. .

The following are suggestions to consider in creating project strategies:

- Providing information and enhancing skills (e.g., offer training in small business management).
- Enhancing services and support (e.g., start a hospitality training programs for indigenous members).
- Modify access, barriers, and opportunities (e.g., provide accounting tools for a small business owner).
- Change the consequences of efforts (e.g., provide incentives for indigenous women to work).

Besides developing the strategies for the project development, it is crucial to consider the strategies of marketing and promotion for sustainable products of the project. The purpose of developing marketing and promotion plans in advance is to help you think how can you promote the project when developing it.

Examples of broad strategies include:

Cultural Programming

- A revitalization program might enhance the artisan life of the community by encouraging artisan to perform traditional craftsmanship.

- A cultural and youth activities program helps to restore and strengthen cultural traditions of the community by fostering an appreciation for the arts; and by introducing youth to artistic and cultural activity.

Community Capacity Building

- An entrepreneurship training program might be implemented in the community, to offer the community members skills and knowledge of running their businesses so that they can be providers of the project.

- A women empowerment project might be included in entrepreneurship training program to encourage women to have their own business and provide them the opportunity to be financially independent.

- Give back program that provides funding to the community's government and non-government organizations to support new and innovative infrastructure projects in and around their communities.

Set Project Key Performance Indicators for the Project

The purpose of setting key performance indicators (KPIs) is to measure, monitor and manage the performance of actions and activities. KPIs are a necessary part of any business aiming for success. It allows to have a vision of what needs to be done to improve the project, and it educates every member of the team with regards to developing a strong approach to project success. KPIs represent a set of measures focusing on those aspects of performance that are the most critical for the current and future success of the project. You can refer the outputs and outcomes from your logic model to set up your KPIs.

Following are some of the examples for the KPIs category for sustainable tourism developments:

Community Capacity Indicators

- % of local businesses that belong to a local association/ partnership.
- % of community members trained for having their own business.
- % of community members that increase their household income.
- % of community members that generate income from land business.

Economic Indicators

- Number of day visitors or trips (% increase/decrease).
- Value of day visitor spend (% increase/decrease).
- Return on investment for marketing campaigns (as a ratio)
- Annual average % bed space and bedroom occupancy of accommodation.

Satisfaction Indicators

- % of visitors who rate the overall visitor experience as good or excellent.
- % of visitors who consider the overall impression of the service to be good or excellent.
- % of stakeholders who consider the general promotion of the destination to be good.
- % of stakeholders who consider the information service to be good or excellent.

Sustainability Indicators

- Existence of an agreed and monitored sustainable tourism and action plan.
- % of residents indicating that they are satisfied with the local impact of tourism.
- % of tourism enterprises (accommodation, attractions, activities) participating in green tourism accreditation schemes.
- % of tourism enterprises (accommodation, attractions, activities) with a recognized environmental certification.

Phase 4

Formal Partnership
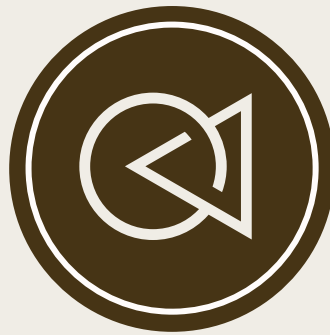
STEP 1   Negotiating and Partnering

Consider Legal Structure in the Destination

Objectives of this phase:

- Negotiate and partner with a community

The Importance of partnerships

Partnership agreement offers legal mechanisms to ensure that the project development meets all stakeholder interests. A successful one emphasizes on the information exchange and reciprocity while taking into consideration of the difference in culture, language, value, and goal. If partnering with indigenous communities, a partnership agreement will protect indigenous rights and clarify benefits in the project development.

Establishing a formal partnership agreement also reinforce a positive relationship and foster a culture of trust. It requires stakeholders to outline and develop the binding agreement based on mutual understanding through consultation and negotiation. To reduce uncertainty and solidify stakeholder's contribution by clarifying commitments, responsibility, impacts of all parties involved.

Importance of TBLD+C commitment

TBLD+C commitment ensures sustainability in project development. It is imperative to address social, economic, environmental, and cultural development in a formal partnership agreement. In this case, the commitments will assure the inclusion of the community in the development project; encourage the use of local resources to sustain project wealth and improve community well-being; ensure a fairly financial pay off for the community; conserve and revitalize the local heritage. These commitments will catalyse new solutions, plans and executions that drives for social innovation despite several challenges and barriers along the way of development.

Negotiating and partnering

The purpose of negotiation is to facilitate the process of creating partnership agreement and establishing contractual relationship with the community. Negotiation is crucial if the community's concerns present a significant risk to project development. It is used to arrange an agreement regarding the profits and liabilities among stakeholders; for example, rights to land and resources. In this case, negotiated agreement assure community with an additional clarity, predictability, and security in which project's commitments, impacts to community and its members, and community's contributions.

In this step, you need to determine whether there is a need for intermediary support to help in drafting an agreement or work with the local community. The intermediary will be an influential and active actor that serve as a strong linkage between the project and the local people. The intermediary will bring experience, specialization, knowledge, skill and capacity to help outline an effective agreement. For example, if the indigenous community has a trust issue with the project, the intermediary will facilitate a strategy to proceed the negotiation and foster a healthy relationship. The intermediary can be a local specialist or social advocate in the region such as educator, government, successful local social entrepreneurs, experts in sustainable development, consulting company with TBLD+C alignment and others.

* Negotiation works best when conducted under the rules of "interest-based" consensual agreements. This approach delivers a higher level of satisfaction among negotiating parties and enhances positive outcomes in the project development.

The following suggestions will aid in conducting an effective negotiation.

- Understand when you should negotiate.
- Choose a style of negotiation that is likely to build relationships.
- Conduct negotiation with an open mind, a willingness to engage indigenous community in the process, and a genuine desire to create solutions and to reach an agreement.
- Be transparent and considerate and use the language that is understood and agreed to by all parties.
- Consider legal mechanisms with which to engage partners and to protect mutual benefits.

After an agreement has been reached with the local community or involved members, the project strategy can be refined to make it more concrete. We recommend to actively involve the community in this action to reduce operational ambiguity. It's also recommended to document the process of planning and finalizing project strategies, as well as host sessions to engage community members in the planning of the project implementation.

Consider Legal Structure in the Destination

A review of the legal structure in the region and/or country of the project is necessary to have a better understanding of local rights, and other laws that might be applicable to the development of the project. Below are some laws and regulations in Mexico if working with Mayan communities:

The Federal Constitution of the United Mexican States

Article 2:
Rights to self-determination for indigenous people. Autonomy includes:

- Decide their internal forms of coexistence and social, economic, political and cultural organization forms.
- Apply their own standards in regulation and resolution of internal conflicts
- Choose rules, procedures and practices, authorities or representatives to exercise their own forms of internal government
- Preserve and enrich their languages, knowledge and all the elements that constitute their culture and identity.
- Conserve and improve their habitat and preserve the integrity of their lands in the terms established in this Constitution.
- Access, with respect to the shapes and forms of ownership and land tenure established in this Constitution.
- Elect, in municipalities with indigenous populations, representatives to town councils.
- Full access to state jurisdiction while taking into account their customs and cultural respecting.

Article 27:
Right to the ownership of lands and water within the boundaries of the national territory. The law protects their integrity by:

- Respect and strengthen community life.
- Respect the will of community members.

Phase 4: Step 1.2:

Prepare your partnership plan

1. **Define the the core members** of the partnership.
2. **Streamline goals** and plan for partnership agreement.
3. **Define core management team and structure** of the project (Directors, Project Manager, Producer, Ecologist, Anthopolist, Lawyer, Finance, Accounting, etc.).
4. **Prepare a Memorandum of Understanding (MOU)** specifying each part's role and commitments.
5. **Select legal partnership structure**: strategic alliance, joint venture partnership, constituting a new entity, etc.

(COMPLETING THE MOU WILL ALLOW YOU TO CONTINUE WITH THE ACTION PLAN AND BUDGET BEFORE SIGNING A LEGAL DOCUMENT)

6. **(Phase 5) Create detailed budget and plan** considering the yearly core team salaries and project development costs and the **business plan with revenue streams** and percentage of shares.
7. **Create legal partnership agreement:** all details of the project should be included: partners, team, budget, resource mgmt structure, etc.

✳ What is a Memorandum of Understanding?

A memorandum of understanding (MOU or MoU) is an agreement between two or more parties outlined in a formal document. It is not legally binding but signals the willingness of the parties to move forward with a legal document.

MOU CREATION PROCESS
Memorandums of understanding are worked collectively

1. Description of common objectives, agreements on roles, responsibilities, and expectations.
2. Agreement on conducting a feasibility study.
3. Contribution commitments from each participant.
4. Reciprocal confidentiality commitment for a variable term, which can cover the total duration of the project.
5. Deadline for making decisions, after completion and delivery of the feasibility agreement.
6. Responsibility of the participants for the abandonment of the project, with or without reason.
7. Explanation of common and own expenses of each signer.
8. Waiver of claims for unilateral expenses.

BUILDING A LEGAL PARTNERSHIP

IDENTIFY THE OPTIONS OF WHAT TYPE OF PARTNERSHIP IS BEST SUITED FOR THE PROJECT

1. Clarify objectives thinking through **alternative options for partnership, collaboration and contracts.**
2. **Working through legalities over finance management and land tenure** ensuring partners can comply with non-financial benefits, financial commitments and legal regulations.
3. **When structuring the financial deal,** explore a range of options by using innovative financing to structure joint venture deals, balancing risk and looking beyond to a range of cash flow options for the alliance members and the project's team.

Examples:

» **STRATEGIC ALLIANCE / PARTNERSHIP**

Collaborative agreement between two or more entities, not considered a separate legal entity.

» **JOINT VENTURE PARTNERSHIP**

Two or more entities sign a contractual agreement and thereby create a third, temporary jointly owned entity.

The main difference between a joint venture and a partnership is that the members of a joint venture have teamed together for a particular purpose or project, while the members of a partnership have joined together to run "a business in common".

Phase 5

Action Plan & Procedure

STEP 1   Develop an Action Plan

STEP 2   Project Management

Estimating Budget

Developing The Timeline

* Objectives of this phase:

- Develop actions to implement the project idea or proposal
- Identify necessary capacity building and training
- Estimate the budget
- Develop a timeline

The Importance of an Implementation plan

A concrete implementation plan is essential for project management to achieve the project goals. It ensures that all stakeholders share the understandings about the project structure, steps, and plan to avoid serious setbacks in the development.

We suggest that an implementation plan be formulated into three stages.

- *Immediate or short-term* actions for quick wins
- *Mid-term* actions for reliance and funding
- *Long-term* actions based on overall objectives

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Develop an Action Plan

Developing an action plan will turn the project's vision, mission, and goals into reality. The action plan fosters accountability within the project team and involving parties which lead to the strong link of higher performance and efficiency. It describes how the team will meet the objectives through detailed action steps and informs what actions or changes should occur during the development. The action plan consists of the following components. *(See workbook for the tool 7, **Action Plan Table**).*

The action plan consists of the following components.

- **Action step(s):** What will happen.
- **Person(s) who is responsible:** Who will do what.
- **Date to be completed:** Timing of each action step.
- **Resources required:** What resources and supports are needed and available.
- **Barriers or constraints:** What are barriers or constraints to progress? What contingency plans are needed to ensure goals are achieved?
- **Collaborator(s):** Who has an interest in the project's success and should be included in its implementation?
- **Monitor and evaluate:** How will this action or strategy be monitored and evaluated?

In the beginning of an implementation plan development, we highly recommend to consider capacity building and training as a principle of long-term actions. This is because sufficient capacity is a foundation to empower community well-being. Moreover, communities with capacity confidence are likely to offer better quality of products.

Community capacity building is a practice to promote "local capacity" that requires a contribution in time and resources from all stakeholders. By efficiently developing local community capacity, it will sustain the project's outcomes in a way that encourages the community to exercise their control over physical, social, financial and cultural assets and manage the availability of them in activities.

Capacity building aims to strengthen community skills, abilities and infrastructures. It could be done by providing the support in trainings such as management, finance, and hospitality skills. After all, it provides community members the employment opportunities and encourages them to take the leading roles in the development of the project.

We suggest the following questions that encompass community capacity building and training to be imperative:

- What is the existing capacity that the community contributes to regenerative development?
- What capacity strategies are needed to be integrated based on sustainable development?
- What sustainable development policies will enable community capacity building and training?
- What characteristics reflect the local community?
- What are the strengths of the local community? How those strengths valorise locality? and how are they engaged in this process?
- What are the needs of the local community in the project development to improve high-quality regenerative development projects?
- What specific skills and expertises are needed in the project development to improve or maintain high-quality developments?
- What kind of financial and business support is needed?
- What support will enable community members to actively participate in the capacity building and training process?

Project Management

Estimating Budget

Estimating the budget is fundamental to your project as it will aid you to plan project expenses and prepare for relating approvals. The budget can be estimated by year, cost, or activities to match the funds you apply.

Developing the Timeline

The purpose of developing timeline is to assist the team to organize activities that lie ahead. The timeline will demonstrate the involved parties' accountabilities and the deadline for each tasks. It is useful to track operation sequences and each action impact in the streamlined process.

Below is an example of an implementation plan

Action Step	Person Responsible	Date Start	Date End	Resource Required	Barriers and Constraints	Collaborator	Monitor and Evaluate
Name Actions such as: *Entrepreneur-ship Training*	Name Responsible People	Determine Starting Date such as: *May 2022*	Determine Ending Date such as: *July 2022*	Name Resources such as: *Lectures and Funding*	Determine Barriers and Constraints such as: *Access to Grants and Funding*	Name Education Institution, Government, or Organization	Determine KPIs such as: *Student Attendance Rate, Test Score for Entering Students, Ave. Course Experience, Ave. Daily Participation Percentage*
Name Actions such as: *Draft a Social Marketing Plan*	Name Marketing firm	Determine Starting Date such as: *July 2022*	Determine Ending Date such as: *August 2022*	Name Resources such as: *$15,000*	Determine Barriers and Constraints	Name Members in the action group	Determine KPIs

Below is an example timeline.

ACTIVITIES	RESPONDENT	PLANNING				MONTH 1				MONTH 2			
		JUNE				JULY				AUGUST			
		week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4
PROJECT ASSESSMENT													
Define project vision, mission, goals, and objectives	(Name)			✖									
Create community profile	(Name)				✖	✖	✖						
Preparation for the first contact with the community	(Name)					✖							
PARTICIPATORY COMMUNITY EVALUATION													
7 Capitals Assessment	(Name)							✖	✖	✖	✖		
Community asset mapping	(Name)									✖	✖		
Evaluate and summarize key findings	(Name)											✖	✖

Phase 6

Monitor & Evaluate

STEP 1   Track progress

STEP 2   Evaluate and improve

Objectives of this phase:

- Monitor and measure impact of the project
- Evaluate areas of improvement

The Importance of Incorporating Participatory Action Research

Monitoring and evaluating is a continual process that tracks the efforts and redirects the project management to suit changing circumstances. It will be performed as a reflective cycle whereby the team and the community collect and analyze data from activities or actions, then modify and redesign them for better results. (See figure 4: Reflective cycle)
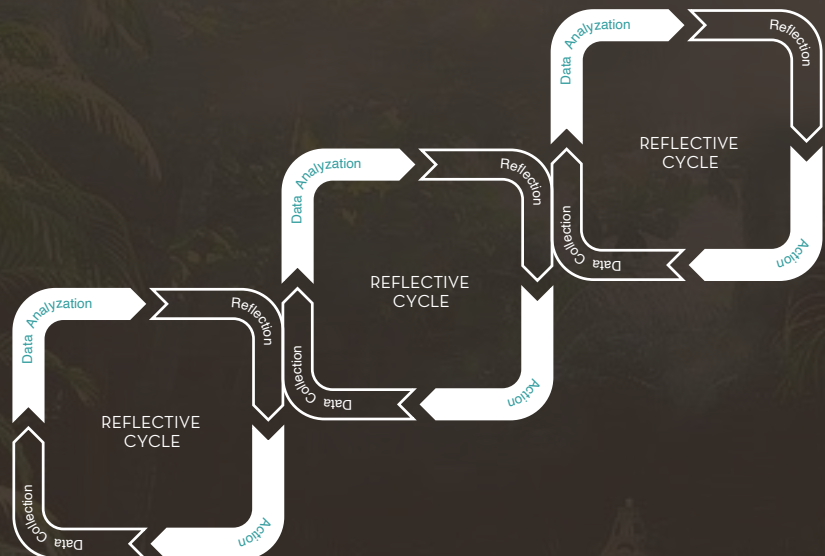
Figure 4: Adapted from "The Action Research cycle". Australian Government Department of Social Service, 2008. Copyright 2008 by Australian Government Department of Social Service

Monitor

Monitoring system is crucial to project development. It records and measures project progress regarding its Key Performance Indicators (KPIs).

It is valuable to share short-term and long-term progress reports with the team and stakeholders. In short-term, we suggest adopting Dashboard or Scorecard to display a high-level monitoring mechanism of how team is performing and their achievements in consideration to a proper monitoring time frame. Moreover, consider recording the progress to make a comprehensive annual report. These reports will make the team aware of positive and negative impact throughout an implementation, understand the consequences to prioritize tasks, determine resources to support project development and tackle unforeseen obstacles in time.

Most effective metric for Dashboard or Scorecard could focus on short-term actions such as:

- **Employment:** Monthly employment or generated income through tourism.
- **Distribution:** Dispersion of tourism measured by monthly travel activity and spend.
- **Resource Efficiency:** Measure monthly carbon footprint, water and waste efficiency in tourism accommodation.
- **Community Participation and Decision-Making:** Variety of community stakeholders to play a vital participatory and formative role in the tourism project.

Long-term metrics such as:

- **Poverty Alleviation:** An increase of the community household income.
- **Carbon Emissions:** Carbon footprint generated by the project.
- **Sustainable Production:** Sustainability of development projects.
- **Gender Equity:** Gender equity in tourism and travel-related employment is improving.
- **Development:** project impact that benefits community members.

Evaluate

The purpose of evaluating the project is to make judgments about an activity or action to improve effectiveness. An evaluation will inform planning decision and process whether it should be refreshed or adjusted.

Conclusion

Not limited to the region, this roadmap can be replicated in different countries and their local communities to build cohesion and empowerment.
End-users can engage and include local communities in the development of their projects addressing society's greatest challenges. Ultimately, this roadmap serves as an intermediary support to strengthen and establish relationships with stakeholders for the development of sustainable development projects, improving the well-being of local communities while preserving their environment. Additionally, it represents a framework for local people to protect their interests, to be involved throughout the whole project and protect their livelihoods. As emerging economies start to recognize the power of regeneration for economic development, there is a need for conscious new practices that take into account the needs of communities to strive for social development.

Glossary

Asset refers to as the resource, an asset is anything that can be used to improve the quality of community life (Community Tool Box, n.d.).

Appreciative Inquiry is a facilitating process that uses positive questions to brings in sound involvement and positive changes of the stakeholder. Emphasizing on "Every human system has something that works right–things that give it life when it is vital, effective, and successful. AI (Appreciative Inquiry) begins by identifying this positive core and connecting to it in ways the heighten energy, sharpen vision, and inspire action for change" (Appreciative Inquiry, 2016).

Community Asset Mapping is a visual, geographic representation of community characteristics (Michigan State University, 1998). In the roadmap, this tool identifies and aid the visualization of the community-based assets.

Community Capital: Defined as "any asset or resource in the community that has the potential to produce even more assets" (AgriLife, 2011).

Key Performance Indicator (KPI) is "A measurable value that demonstrates how efficiently an organization is achieving critical business objectives" (Klipfolio, n.d.). KPIs is used in the roadmap to evaluate project's success and each milestones aligning with TBLD+C principles.

Seven Capitals Assessment: A conceptual framework to evaluate and analyze a community health and its capacity (Iowa State University, n.d.). The seven capitals include natural capital, cultural capital, human capital, social capital, political capital, financial capital, and built capital (Svannostrand, 2015). This tool is used in the roadmap to identify the capitals within a community.

Stakeholder Analysis is a tool for developers to determine the interests, goals, and roles amongst involving parties. The purpose of the stakeholder analysis is to obtain an idea of the parties' expectations of how tourism will be developed in the coming years, within the region; and to identify key areas for tourism potentials (Copenhagen, 2012).

SWOT Analysis: A process that identifies the strengths, weaknesses, opportunities and threats of an organization (Taylor, 2016). The SWOT analysis will be used in participatory community evaluation to determine the strengths, gaps, opportunities, and challenges, to develop a sustainable business model for both the MSME and the local community.

Sustainable Tourism Product: is a group of components brought together in a "bundle" to satisfy the tourist's leisure, pleasure or business needs. A tourism product is anything that can be offered for attraction, acquisition or consumption. It includes physical objects, services, personalities, places, organizations and ideas (Gautam, n.d.). A sustainable tourism product has a mean to be responsible to environment, socially fair and economically viable way so that users (visitors) of the product can meet their current needs without compromising future generations from being able to use the same resources (Font & Carey, 2005).

Triple Bottom Line by Design and Culture (TBLD+C) is a framework that incorporates three dimensions of performance: social, environmental and financial (Slaper & Hall, 2011), as well as "Culture"; a new principle proposed by Jon Hawkes.

Tourism Asset Inventory is an inventory of current tourism products and infrastructures. It enables project developers to review the number, range, and quality of resources, and also identifies gaps that need to be addressed (Destination British Columbia, n.d.). This tool will be used in the roadmap to identify ownership and accessibility of the asset, and to better define tourism products and strategically market the asset.

Value Chain Analysis is a tool to investigate the structure of the tourism processes in the destination and prepares an action plan to enhance the local economic impact from tourism (UNWTO, n.d.). The tourism value chain helps developers to assess steps and work towards the growth. It doesn't consider only a particular stakeholder, but also an active inclusion of local community across the entire processes of tourism development.

Workbook

Tool 1:
Phase 2: Step 1.1

Community Capital Mapping Chart

Instructions of community capital mapping:
1. Download the map of the region/place/community the project take place.
2. Identify the community capitals/assets and mark them on a map with different colors, this will help you pinpoint which zone has more assets.

MAP		
	BUILT	**CULTURAL**
	🔴	🟡
	NATURAL	**ECONOMIC**
	🟢	🟠
	SOCIAL	**POLITICAL**
	🔵	🟤

Tool 2:
Phase 2: Step 1.1

Seven Capitals Assessment Table

SEVEN CAPITALS ASSESSMENT		
CAPITAL	**DESCRIPTION OF CAPITAL**	**ASSETS**
CULTURAL CAPITAL	This includes ethnic festivals, multi-lingual population, traditions, heritage, or a strong work ethic. Cultural capital influences what voices are heard and listened to, which voices have influence in what areas, and how creativity, innovation, and influence emerge and are nurtured.	
SOCIAL CAPITAL	This reflects the connections among people and organizations or the social glue that makes things happen.	
ECONOMIC CAPITAL	This includes the financial resources available to invest in community capacity building, underwrite businesses development, support civic and social entrepreneurship, and accumulate wealth for future community development.	
HUMAN CAPITAL	This includes the skills and abilities of residents as well as the capacity to access outside resources and knowledge to increase understanding and to identify promising practices (education, health, skills, and youth).	
NATURAL CAPITAL	Those assets that abide in a location, including resources, amenities and natural beauty.	
POLITICAL CAPITAL	The ability to influence standards, rules, regulations and their enforcement. It reflects access to power and power brokers, such as access to a local office of a member of Congress, access to local, county, state, or tribal government officials, or leverage with a regional company.	
BUILT CAPITAL	The infrastructure that supports the community, such as telecommunications, industrial parks, main streets, water and sewer systems, roads, etc. Built capital is often a focus of community development efforts.	

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Tool 3:
Phase 2: Step 1.1

Tourism Asset Inventory Table

Potential Asset inventory categories include:

Architecture, Music, Arts and Crafts, Historical Site, Festival/Event, Natural Area, Health and Wellness, Accommodation, Food and Drink, Cultural Venue, Packaged experiences, Infrastructure and Services Inventory, Socio-Economic, Cultural and Natural Resource Inventories (Community Impacts), Environmental and Biodiversity (Ecological) Footprint Inventories, Market Demand (Tourist) Inventory, Supply and Competitiveness Inventory, Human and Institutional Capacity Inventory.

Please see the example provided below for Tourism Asset Inventory:

TOURISM ASSET INVENTORY			
INVENTORY	**CONTROLLING INTEREST** (owner)	**SUPPLY STRENGTHS**	**SUPPLY GAPS**
Accommodations • Number of Rooms and Beds • Segmentation mix of accommodations • Average rack rate (per season) • Employment figures • Occupancy rate (per season) • Average length of stay • Also key markets, use of green technologies, involvement with local communities, and other elements to the destination's strategy.	(Name owner, organization or government)	• Authentic house	• No hotels in the village • Need to build capacity
Attractions • Accessibility • Number of visitors • Revenue generated • Resources consumed/produced • Current and/or potential uses • Drawing power	(Name owner, organization or government)	• Beautiful cenote • Unpolluted natural resources	• Need to build capacity • Need to renovate
Infrastructure and Services • Accessibility. • Communication methods. • Transportation system. • Food system. • Public services such as water, energy, health, and security. • Health of community, environment • General land use and availability.	(Name owner, organization or government)	• Local food system • Organic farming • Foods diversity	• Poor water infrastructure • No grocery stores

Tool 4:
Phase 2: Step 2

Value Chain Table

Instruction of value chain:

1. From the selected asset, think of the project's key activities and create your value chain.
2. Identify key assets of the community you are working with and write how can they participate in each phase of the value chain. (Deploy your information in the 'community' column at the bottom of the value chain)
3. Identify key actions/person/connection in each phase of the value chain. (Deploy your information in the 'project' column at the bottom of the value chain)
4. If you have any additional resource that you and the community believes it is valuable to the project development, write it in the corresponding phase. (Add to 'additional resources' column)

Additional Resources	Entrepreneur	Community	

Tool 5:
Phase 2: Step 2.1

SWOT Analysis Table

	POSITIVE	NEGATIVE
INTERNAL	**STRENGTH**	**WEAKNESS**
EXTERNAL	**OPPORTUNITY**	**THREAT**

Tool 6:
Phase 3: Step 2

Logic Model Table

Logic Model Table can be done following the community capitals

Inputs/Resources	Project Activities	Outputs	Short-term Outcomes	Long-term Outcomes	Impacts
Social Capital					
Cultural Capital					
Financial Capital					
Natural Capital					
Human Capital					
Political Capital					
Built Capital					

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Tool 7:
Phase 5: Step 1

Action Plan Table

Action Plan							
Action Step	**Person Responsible**	**Date Start**	**Date End**	**Resource Required**	**Barriers and Constraints**	**Collaborator**	**Monitor and Evaluate**

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