

**Tobago Steering Committee of the Travel Foundation**

**Report of first Strategic Planning Workshop**

**22<sup>nd</sup> – 23<sup>rd</sup> October 2005**

***Inn on the Bay, Lambeau***

*Facilitated by Nicole Leotaud, Caribbean Natural Resources Institute (CANARI)*

**1. Background**

The Travel Foundation (TF) is an independent charity, set up through a partnership between the outbound tourism industry, government and non-governmental organisations (NGOs) in the UK to help the UK travel industry take effective action for sustainable tourism through:

1. Developing destination research & demonstration projects to guide best practice.
2. Sharing and developing best practice amongst a multi-stakeholder forum.
3. Raising awareness of the issues and promoting the benefits of sustainable tourism with the industry, government and consumers.

Travel Foundation is based in the UK and has established several country programmes, including one in Tobago, which are managed by local multi-stakeholder Steering Committees. The Tobago Steering Committee was established through processes of stakeholder consultation in late 2003. A Programme Coordinator was hired in 2004. The Committee has focused its efforts so far on identifying projects for funding from TF, monitoring and evaluating projects, networking and promoting sustainable tourism in Tobago. TF has committed to funding the Tobago Steering Committee for three years, after which it expects that the Committee will evolve into an independent self-sustaining body (which will continue to have a close relationship with TF).

In mid-2005 the Tobago Steering Committee requested that the Caribbean Natural Resources Institute (CANARI) facilitate a strategic planning process for the development of the Steering Committee into an independent organisation. A needs assessment was conducted in June 2005 and the first strategic planning workshop was held on 22<sup>nd</sup> – 23<sup>rd</sup> October 2005 in Lambeau, Tobago.

## **2. Workshop objectives**

The first strategic planning workshop aimed to:

1. Review the elements of a participatory strategic planning process.
2. Develop a coherent world view and foundation for strategic planning by drafting a vision, mission & values statement.
3. Identify the key stakeholders and conduct a preliminary analysis of what role they would play in the strategic planning process.
4. Identify next steps for the strategic planning process.

The agenda is attached as Appendix 1.

## **3. Participants**

The Director of the Travel Foundation from the United Kingdom (TF-UK) participated on the first day. Two representatives of Virgin Holidays Limited participated on both days. Twelve members of the Steering Committee and the Programme Coordinator (staff) attended. The list of participants is attached as Appendix 2.

## **4. Summary of the overall workshop process**

The discussions conducted during the two days of the workshop were stimulated by semi-structured sessions but the sequence of sessions was changed in response to the direction of the discussions. This section summarises the overall process followed in the two-day workshop, with specific content covered summarised in later sections of the report.

It was noted that the change process for evolution of the Tobago Steering Committee into an independent organisation would include:

- Strategic review
  - stakeholder needs & expectations,
  - examination of relevant external trends
  - scan of internal capacity
- Strategic planning: development of:
  - mision
  - mission

- strategic goals and objectives
  - Review of governance structure
  - Review of partnerships
  - Internal capacity building

The strategic planning workshops would therefore only be one element of the change process. Participants' expectations of the two-day strategic planning workshop were to:

- Plan where they wanted to go;
- Develop mission, vision, projects, purpose, objectives;
- Develop an identity, focus, niche;
- Plan for a "Tobago version" of sustainability;
- Plan to produce deliverables that are "wins" for UK funders, the community, and the environment.

After clarification of the workshop objectives and agenda, the current situation and issues for the way forward were reviewed. This session included a presentation by Sue Hurdle, Director of TF, on TF-UK's objectives, strategies and programmes. This stimulated a discussion about how the Tobago Steering Committee should continue to evolve and fit into the TF-UK's programmes and what the relationship would be. The next session looked at developing a mission for the Steering Committee and brainstorming around what the organisation wanted to do.

Day 2 began with an examination of the draft mission and strategic areas of focus for the organisation. Participants then began drafting two separate visions - where they wanted to see the organisation and where they wanted to see Tobago. An analysis of political, economic, social, technological, legal and environmental (PESTLE) trends was then begun with a review of trends in the UK travel industry.

A review of the processes of participatory strategic planning was conducted. The Steering Committee then identified key stakeholders and started to look at how to include them in their strategic planning process. A discussion of next steps led to the identification of some concrete actions for the Steering Committee for the next few months.

The full set of slides presented is given in Appendix 3.

## **5. Travel Foundation's priorities and programmes**

Sue Hurdle gave a slide presentation on the international programme. She noted that TF-UK was moving from a focus on countries towards longer-term thematic

programmes (e.g. agriculture). Seven programme areas and some activities under each of these were reviewed and are outlined below.

1. Linking local producers in the industry (agriculture, craft, excursions, informal sector code of practice, beach traders)
2. Environment (reef protection, clean beaches, coastal revegetation, sustainable fishing, climate change)
3. Accommodation (sustainability checklist, guidance for hotels on local sourcing, hotel makeover, certification of hotels)
4. Training (wildlife watching guidelines, turtles, tour operators, beach traders)
5. Promoting the benefits of sustainable tourism (customer video & leaflet, insider guides, film, company communications)
6. Children (school gardens, in-flight activity pack, kids clubs, and guidelines for overseas staff)
7. Research (economic impacts of tourism in the Caribbean, tour operator supply chain, customer attitudes)

She noted that the 5-10 year vision for TF-UK is that UK customers will know what TF is and that the UK travel industry will know what TF is and be actively incorporating TF-UK's recommendations into their business.

She also noted the direct link TF makes between beneficiaries (local people, tourists, and tour operators), managers, community, and destination to protect and sustain the resource and interest of the tourism industry and address issues and gaps in sustainable tourism and the emphasis on "quick wins" to "sell" sustainable tourism.

Ms. Hurdle suggested that next steps for Tobago should include the identification of strategies (around one or two main areas of focus and building on current successes) and focusing on sustainability and evaluation of impact. Relevance to the UK travel industry would be a factor for consideration in light of TF-UK's focus.

## **6. Evolution of Tobago Steering Committee**

Extensive discussion explored options for the evolution of the Tobago Steering Committee with regard to its relationship with TF-UK. The facilitator noted that key issues to consider were:

- **Purpose:** What is the group's role? What is its niche?
- **Structure:** Who should be involved? Should it be a membership organisation, umbrella group, other?

- **Relationship with TF-UK:** Will it be a subsidiary? A partner? (This is important in terms of credibility, access to funders, access to publicity, etc.)
- **Funding:** What will be the future sources of funding?

The Steering Committee felt very strongly that it **wanted to maintain a close relationship with TF-UK, and that the preferred option would be to be a subsidiary local arm of the UK-based body**. TF-UK would then play the role of a “parent” to a local TF-Tobago “franchise”. TF-Tobago would need to have the same vision, mission and principles/values but operating independently and setting local priorities. It was recognised that this relationship would not assume that TF-UK could guarantee financial support, but TF-Tobago would be able to use the TF “brand” and logo.

The advantages and disadvantages of this type of relationship were discussed and are summarised in Table 1 below.

*Table 1: Advantages and disadvantages of a “franchise” relationship with TF-UK*

<b>Advantages</b>	<b>Risks</b>
Brand recognition	Risks to TF-UK - Risk to TF brand if franchise engages in activities not supportive of TF-UK mission, vision & values
Reputation of TF-UK	
Access to international network	Risks to TFT - Will be an element of “control” from TF-UK that will need negotiation and clear terms of the relationship - (e.g. will TF-UK have power of veto?)
Tobagonians value what is “foreign”	
TF-Tobago can draw on experience of TF-UK	Risks to both TF0UK & TFT -
TF-Tobago can give to TF-UK	
Possible financial support from TF-UK	Potential culture clash
Link / relationship with tour operators	Structure will need to be developed
Network with other TF country programmes & projects	

The Director of TF-UK noted that the UK-based Board had not made any decisions regarding the evolution of relationships with the Steering Committees and would consider options presented to them. She noted, however, that some cautions had been raised regarding the need for maintaining the quality and integrity of the TF brand.

The Steering Committee agreed that this option would be presented to the TF-UK Board for their consideration and discussions could then take place regarding the definition of terms of the relationship.

The rest of the workshop proceeded on the assumption that some form of close relationship with TF-UK would continue.

## **7. Participatory strategic planning**

It was noted that strategic planning was important to:

- Provide the vision of where the organisation is going over the next few years
- Establish what you do and why (mission and values)
- Clarify how you get where you want to go (realistic strategic goals & objectives for the planning timeframe)
- Provide the basis for the action (operational) planning
- Provide a base from which progress can be measured (results measurement)
- Enable the organisation to make the most effective use of its resources or to identify new resource needs
- Determine priorities and establish criteria against which project opportunities can be assessed

Typical steps in a strategic planning exercise would include:

- Establishing the scope of the strategic planning exercise
- Establishing the strategic planning framework (e.g. stakeholder identification, needs analysis, analysis of external trends, analysis of organisation)
- Conducting a review/evaluation of past work of the organisation
- Creating or reviewing mission and vision statements
- Developing a new strategic plan – strategic goals (and objectives)
- Validating the new plan with stakeholders
- Implementing the plan
- Monitoring and adapting the plan
- Reviewing and evaluating the plan

Elements of a strategic plan are:

- Foundation – vision, mission, values

- Framework – stakeholder identification, needs analysis, analysis of external trends, analysis of organisation
- Directions – strategic programmes or goals

The strategic planning process should be with the participation of key stakeholders to facilitate:

1. Incorporation of a wide range of perspectives and ideas, resulting in improved management
2. Improvement in the knowledge and skills of all stakeholders
3. Increase in the likelihood of stakeholder support through involvement in decision-making
4. Provision of a forum for identifying conflicts between users and negotiating solutions to them
5. Contribution towards stakeholder empowerment and local institutional development, especially when the sharing of management responsibility is involved

### **8. Developing a mission**

A mission statement communicates briefly and clearly the **fundamental purpose** of the organisation - both internally and externally. In working to develop their mission, the Steering Committee discussed four key questions as summarised in Table 3 below.

*Table 3: Developing elements of the mission*

<b><i>Who are we?</i></b>	<b><i>What do we (want to) do?</i></b>	<b><i>Who do we do it for?</i></b>	<b><i>How do we do it?</i></b>
<ul style="list-style-type: none"> <li>• The voice of sustainable tourism in Tobago</li> </ul>	<ul style="list-style-type: none"> <li>• Mentor/facilitate</li> <li>• Network</li> <li>• Linkages</li> <li>• Advise</li> <li>• Support</li> <li>• Influence / advocate / lobby</li> <li>• Analyse issues</li> <li>• Identify projects / needs</li> <li>• Action on the ground</li> <li>• Filling gaps</li> <li>• Be a role model</li> </ul>	<ul style="list-style-type: none"> <li>• Tobago (the destination)</li> <li>• Environment</li> <li>• People (social &amp; cultural) – locals &amp; visitors – tourism stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• Via tour operators &amp; tourists as key partners</li> <li>• THA policy</li> <li>• Importance of communication</li> </ul>

	in region <ul style="list-style-type: none"> <li>• Set standards</li> <li>• Be a catalyst for win-win</li> <li>• Identify models &amp; best practices</li> <li>• Be innovative</li> </ul>		
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From the brainstorming and discussion sessions, a mission for the organisation (TF-Tobago) was drafted by the facilitator. This was presented to the workshop participants, discussed, and refined to be:

***“The Travel Foundation-Tobago promotes and facilitates socially, environmentally and economically sustainable tourism in Tobago that provides maximum benefits for the local people, visitors and natural environment of the island.”***

The Steering Committee agreed that there was strong congruence between this mission and the mission of TF-UK, which is “to ensure that tourism from the UK gives a greater benefit to the people, environment and economy in destination countries” ([www.thetravelfoundation.org.uk](http://www.thetravelfoundation.org.uk)). This supports the move towards evolution of the Tobago Steering Committee into an arm or subsidiary of TF-UK.

It was noted that the organisation still needs to consider “What does it value?” to develop a set of values/principles by which it would operate.

## **9. Vision development**

The Steering Committee was divided into small groups to brainstorm where they would like to see the Tobago tourism sector and the new organisation in 10 years. The ideas were then presented and discussed and are summarised in Table 2 below. There was strong consensus around the vision for the Tobago tourism sector. The vision for the organisation included strategies for how the organisation would work towards achieving this vision for Tobago.

*Table 2: Vision for the Tobago tourism sector and for the organisation*

<b><i>Vision for the Tobago tourism sector</i></b>	<b><i>Vision for the organisation</i></b>
<ul style="list-style-type: none"> <li>• Majority of hotels supporting and adhering to “green” policies</li> <li>• Tourism managed in a sustainable manner</li> <li>• Proper and effective policy &amp; legislation</li> <li>• Hotels using mainly locally produced</li> </ul>	<ul style="list-style-type: none"> <li>• “Be the voice of sustainable tourism in Tobago”</li> <li>• Fundraising</li> <li>• Channel for projects</li> <li>• Active role in doing projects</li> <li>• Sharing information</li> </ul>

<p>goods &amp; products</p> <ul style="list-style-type: none"> <li>• All infrastructure managed to give a quality life to Tobago's people</li> <li>• Tobago valued by locals &amp; visitors as a destination of <u>demand</u> rather than of choice (demand-driven, demand exceeds supply, first choice, privilege, niche focused, quality)</li> <li>• Tourism industry is force for positive change in Tobago</li> <li>• Stakeholders in Tobago become responsible and active participants in sustainable development</li> <li>• Tobago is part of a healthy regional network</li> <li>• Linkages are established between private and public sectors and communities</li> <li>• There is a more diversified tourism industry/sector linked with other sectors (tourism sector an active &amp; willing participant)</li> <li>• Diversified tourism produce and focus on niche market (eco-tourism, heritage tourism – natural, social, cultural)</li> <li>• Ownership and active participation of local people</li> </ul>	<ul style="list-style-type: none"> <li>• Making linkages</li> <li>• Advisory</li> <li>• Coordinating</li> <li>• Steering</li> <li>• Guiding</li> <li>• Facilitating</li> <li>• Catalysing</li> </ul>
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**10. Identifying strategies**

The strategies to achieving this mission identified in the group brainstorming were grouped into categories as:

- **Research:** Analysing / identifying / M&E
- **Facilitation:** Facilitating / mentoring / supporting
- **Coordination:** Steering / guiding / monitoring
- **Implementation:** implementing
- **Communication:** Catalysing / influencing / advising / voicing / representing?
- **Partnerships:** Networking / linkages

These were consistent with the potential roles identified in the needs assessment conducted in June 2005, which were:

- Advocacy role for sustainable tourism in Tobago - represent diverse stakeholders & provides credibility and voice for smaller groups
- Facilitating / Capacity building role – partner with & assist small groups to get grants, issues grants, provides training & technical assistance
- Action – undertake projects for sustainable tourism
- “Policing” force for sustainable tourism standards

Additional roles for the organisation under research identified in later discussions were: prioritising data needed; facilitating that data collected is consistent / comparable; and collating, analysing, and disseminating information.

### **11. Trends in the UK travel industry**

Analysis of the political, economic, social, technological, legal and environmental (PESTLE) trends relevant to the tourism sector in Tobago and to the work of the organisation (TF-Tobago) would need to be conducted as a next step in the strategic planning process.

Given the attendance of two representatives from the UK travel industry, it was decided to identify the relevant trends in that industry (Table 4) as a prelude to analysis of the implications for Tobago.

*Table 4: Trends in the UK travel industry*

<b><i>Trend</i></b>
<ul style="list-style-type: none"> <li>• Expand in aviation growth – airports in UK</li> <li>• Growth of low-cost airlines (had their peak, will slow)</li> <li>• Lobby against low-cost airlines on environmental grounds (emissions &amp; habitat loss)</li> <li>• Cost of air travel greatly decreasing</li> <li>• Fuel costs increasing</li> <li>• Internet marketing – market becoming price-led</li> <li>• All inclusive</li> <li>• Not quality</li> <li>• Not package tours</li> <li>• Low environmental standards</li> <li>• Lobby for standards &amp; certification</li> <li>• Increased relevance of responsible tourism – quality package, environmental standards</li> <li>• Long-term the price of holidays is increasing</li> <li>• “Short-termism” in industry</li> <li>• Uncertainties because of natural disasters</li> <li>• Booking period getting shorter (price-driven not destination-driven) increasing trend of people coming on packages</li> </ul>

## **12. Preliminary stakeholder identification**

An analysis of who are the Steering Committee's stakeholders and how they would be involved in the strategic planning process needs to be done. This would need to consider:

- The individuals, groups and organisations that will be positively or negatively affected by the outcomes of the planning processes
- The individuals, organisations and institutions that could influence and contribute to the planning processes

The Steering Committee brainstormed a preliminary list of their stakeholders (Table 5).

*Table 5: Preliminary list of stakeholders*

<b>Category</b>	<b>Organisational type</b>	<b>Stakeholders</b>
Social & cultural	Government	Tobago House of Assembly (THA) Department of Culture THA Community Development
	NGOs/CBOs/community	Empowerment Tobago Association of Village Councils Festivals Committee Pembroke group? Steelband organisations People United for Sustainable Heritage (PUSH) Foundation Rotary Club Police Youth Club Churches Tobago Trust
	Private sector	-
Research	Government	Poverty Research & Development Institute (PRDI) Institute of Marine Affairs (IMA) EMA Central Statistical Office (CSO) Management Information Systems for Tourism (MIST) Tourism Development Company (TDC) Ministry of Tourism
	NGOs/CBOs/community	University of the West Indies (UWI) – Sustainable Economic Development Unit (SEDU) and Institute for Hospitality & Tourism (Mona)

		Oxford University CANARI
	Private sector	Federation of Tour Operators (FTO) Caribbean Tourism Organisation (CTO) Caribbean Hotel Association (CHA) Caribbean Association for Sustainable Tourism (CAST)
Agriculture / natural produce	Government	THA Department of Marketing Agricultural Development Bank (ADB) Caribbean Agricultural Research and Development Institute (CARDI) Caribbean Industrial Research Institute (CARIRI) Inter-American Institute for Cooperation on Agriculture (IICA)
	NGOs/CBOs/community	Wildlife Farmers & Breeders Agricultural Society Tobago Apiculturalists Society Horticultural Society
	Private sector	Hortica Ltd. – Trevor Craig Agroprocessors Association Tobago Manufacturers Association Cottage Industries – Taste of Tobago
Marine	Government	THA Fisheries & Marine Resources Buccoo Reef Marine Park Management Committee
	NGOs/CBOs/community	-
	Private sector	Fishermen's associations Speyside reef operators Association of Tobago Dive Operators Water sports operators Charters (fishing, sailing, snorkelling, etc.) Fish processors
Environment	Government	THA Department of Natural Resources & Environment (DNRE) & Forest Reserve Unit Environmental Management Authority (EMA) & Environmental Police THA Land Management Town & Country Lands & Surveys THA Works Trinidad & Tobago Electricity Company (T&TEC) Telecommunications Services of Trinidad & Tobago (TSTT) Water and Sewerage Authority (WASA)

		Ministry of Public Utilities & Environment - Reforestation Programme THA Division of Transport Solid Water Management Company Limited (SWMCOL)
	NGOs/CBOs/community	Honorary Game Wardens
	Private sector	-
Tourism	Government	Port Authority Airport Authority Carnival Development Commission (CDC) Police Hospital & health services Customs & immigration Lifeguards
	NGOs/CBOs/community	Hotel school
	Private sector	Craft vendors Taxi drivers Restaurants Guest houses & hotels Bed & Breakfast Association Tour Guide Association Tour operators Reef operators Airlines Security
Funders	Government	Government programmes
	NGOs/CBOs/community	Travel Foundation (UK) Tourists International funders
	Private sector	Corporate sponsors/funders

### **13. Next steps**

Next steps in between the strategic planning workshops could include:

- Stakeholder perceptions & expectations study
- Sharing the draft vision & draft mission
- Analysing the external environment (political, economic, social, technological, legal, environmental = PESTLE)
- Internal scan of the organisation (strengths, weaknesses, opportunities, threats = SWOT)
- Evaluation of past work (evaluation of outcomes & process)

- Research governance structures & legal requirements

Items for the next strategic planning workshop could include:

- Begin a process of stakeholder analysis
- Examine governance structure & partnerships
- Refine mission & vision and develop objectives for the strategic plan
- Capacity building - Train participants in tools for implementation of the strategic plan (including development of an annual workplan with monitoring & evaluation)

The Steering Committee identified some immediate actions (Table 6):

*Table 6: Summary of next steps for the Steering Committee*

<b>Activity</b>	<b>Timeframe</b>
Hold a Steering Committee meeting (with key stakeholders e.g. funders, grantees, beneficiaries) to evaluate past activities. (Note: prepare with report from Programme Manager)	Tuesday 22 <sup>nd</sup> November, 10 am – 12 noon
Hold a Steering Committee meeting to do PESTLE & SWOT analysis	Tuesday 22 <sup>nd</sup> November, 12 noon – 2 pm
Consult with stakeholders re draft strategic plan (via interviews, meetings)	Nov / Dec
Research governance structures & legal requirements and copy and circulate to Steering Committee	Nov
Hold 2 <sup>nd</sup> strategic planning workshop	Dec / Jan

It is critical that a summary of the Tobago Steering Committee’s progress in strategic planning is shared with the TF-UK Director and Board as soon as possible, noting in particular the recommendation that the local organisation evolve as an arm or subsidiary of TF-UK, as a decision on this would inform further strategic planning and change processes.

## APPENDIX 1

### Agenda

#### Travel Foundation Tobago Steering Committee

#### Participatory Strategic Planning

*Facilitated by the Caribbean Natural Resources Institute (CANARI)*

#### Workshop objectives

1. To review the elements of a participatory strategic planning process.
2. To develop a coherent world view and foundation for strategic planning by drafting a vision, mission & values.
3. To identify the key stakeholders and conduct a preliminary analysis of what role they would play in the strategic planning process.
4. To identify next steps for the strategic planning process.

#### Draft Workshop Agenda:

##### **Saturday 23<sup>rd</sup> October**

10:00 – 10:45	Session 1: Workshop introduction - Welcome, introductions, participant expectations, workshop objectives
10:45 – 11:45	Session 2: The current situation and issues for the way forward
11:45 – 12:15	Session 3: Introduction to strategic planning
12:15 – 1:00	LUNCH
1:00 – 2:30	Session 4: Developing a mission & values

##### **Sunday 16<sup>th</sup> October**

11:00 – 11:15	Session 5: Review of day 1
11:15 – 12:20	Session 6: Creating your vision
12:20 – 1:00	LUNCH
1:00 – 2:15	Session 7: Stakeholder identification & analysis
2:15 – 3:00	Session 8: Discussion on next steps – stakeholder perceptions & expectations study and sharing the vision & mission

## APPENDIX 2

### **List of workshop participants**

Sue Hurdle	Director, Travel Foundation (UK)
Rachel McCafferty	Corporate Social Responsibility Coordinator, Virgin Holidays Ltd.
Mark Steel	Resort Supervisor, Virgin Holidays Ltd.
Chris James	(Chair Tobago Steering Committee) Tobago Chamber of Commerce
Rebecca Bain	(Vice Chair Tobago Steering Committee) THA Ministry of Agriculture
Pat Turpin	(Secretary Tobago Steering Committee) Environment TOBAGO
Gail Bradshaw	(Treasurer Tobago Steering Committee) THA Tourism Department
Susan Ramrattan	Hotel & Tourism Association
Orwin Dillon	Mt. St. George's Farmers Association
Ted Greig	Incoming Tour Operators Association
Jomo Anyika	Tobago Craft Producers
Hubert Alexis	Reef Operators Association
Emile Louis	All Tobago Fisherfolk Association
Tanya Clovis	Save Our Sea Turtles
Owen Day	Buccoo Reef Trust
Rosemary Thomas	Programme Coordinator Tobago Steering Committee

# Tobago Steering Committee of the Travel Foundation

## Strategic Planning Workshop

22<sup>nd</sup> - 23<sup>rd</sup> October 2006

Facilitated by

The Caribbean Natural Resources Institute (CANARI)

CANARI

# Workshop introduction

Session 1

CANARI

## Big picture goal

- To facilitate a process of evolution of the existing Tobago Steering Committee of the Travel Foundation into an independent body

CANARI

## Elements of the change process

- Review of stakeholder needs & expectations, examining external trends, scan of internal capacity
- Strategic planning – vision, mission, strategic goals, objectives
- Review of governance structure
- Review of partnerships
- Internal capacity building

CANARI

## Workshop objectives

1. To review the elements of a participatory strategic planning process.
2. To develop a coherent world view and foundation for strategic planning by drafting a vision, mission & values.
3. To identify the key stakeholders and conduct a preliminary analysis of what role they would play in the strategic planning process.
4. To identify next steps for the strategic planning process.

CANARI

## Workshop agenda

Day 1	Day 2
<ul style="list-style-type: none"><li>■ Workshop introduction</li><li>■ The current situation &amp; issues for the way forward</li><li>■ Introduction to strategic planning</li><li>■ Mission &amp; values</li></ul>	<ul style="list-style-type: none"><li>■ Visioning</li><li>■ Stakeholder identification &amp; analysis</li><li>■ Participatory strategic planning process – next steps</li></ul>

CANARI

# The current situation & issues for the way forward

## Session 2

CANARI

# Travel Foundation UK

### Who are they:

- The Travel Foundation is an independent charity, set up through partnership between the outbound tourism industry, government and non-governmental organisations (NGOs) in the UK.

### Vision?

- The Foundation aims to ensure that tourism from the UK gives a greater benefit to the people, environment and economy in destination countries.

### Motto:

- "Caring for places we love to visit"

CANARI

# Travel Foundation UK's Strategic Goals

- Industry**
  - To facilitate the incorporation of sustainable principles into core objectives of travel companies
- Destinations**
  - To create multi-stakeholder partnerships to enhance the local environment, increase share of tourism revenue to local communities and build local skills.
  - To influence destination policy makers to adopt more sustainable tourism planning and practice.
- Consumer**
  - To increase knowledge, understanding and engagement on sustainable tourism so that consumer behaviour changes accordingly

CANARI

# Travel Foundation UK Objectives?

- The Travel Foundation is helping the UK travel industry take effective action on sustainable tourism.
  - It is an expert resource, helping to set priorities and establishing best practice.
  - It delivers practical tools and guidelines - in a language for business.
  - It helps co-ordinate industry action for maximum impact.
  - ...Realistic solutions for business**
- This (the vision) will be achieved through:
  - Developing destination research & demonstration projects to guide best practice.
  - Sharing and developing best practice amongst a multi-stakeholder forum
  - Raising awareness of the issues and promoting the benefits of sustainable tourism with the industry, government and consumers.

CANARI

# Travel Foundation Current priority themes for funding

- water & waste management
- increasing the supply of local products
- education/training
- conservation (including marine protection)

CANARI

# Travel Foundation Tobago Steering Committee

Business	Chamber of Commerce
Agriculture	THA Division AMAE, Farmers Association
Environment	THA Division AMAE, ET
Tourism	Hotel & Tourism Association, Tour Guide Association, Incoming Tour Operators Association, THA Dept of Tourism
Marine	BRT, Fisherfolk Association, Reef Operators, SOS

Staff = Project Coordinator

CANARI

## History of development in Tobago

- 2003 stakeholder consultations (report?)
- Suggested 3 key areas:
  1. Environment
  2. Agriculture
  3. Cultural heritage
- Established 3 committees (role = to identify & oversee projects)
- Established Steering Committee late 2003 – participants in consultation nominated groups
- Project Coordinator hired Feb 2004

CANARI

## What do you do now?

- Identify projects
- Find co-funding
- Oversee projects (monitoring & evaluation)
- Promote partnerships / networking
- Raise consumer awareness

CANARI

## Need for change

- TF-UK committed to 3 years of funding for projects
- Independent body needs to be formed after this time (“Independent” how? Financially? Different vision & mission? What will be the future relationship?)

CANARI

## Issues

- **Purpose:** What is the group’s role? What is its niche?
- **Structure:** Who should be involved? Should it be a membership organisation, umbrella group, other?
- **Relationship with TF-UK:** Will it be a subsidiary? A partner? (Important in terms of credibility, access to funders, access to publicity.)
- **Funding:** What will the future sources of funding be?

CANARI

## Elements of the change process

- Review of stakeholder needs & expectations
- Strategic planning – vision, mission, strategic goals, objectives
- Review of governance structure
- Review of partnerships
- Internal capacity building

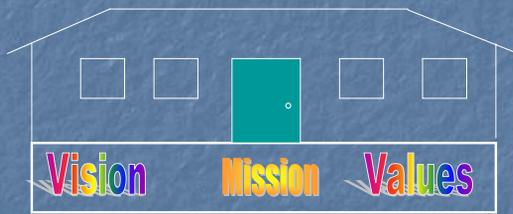
CANARI

## Developing a mission & values

Session 3

CANARI

## Strategic Planning Foundation



CANARI

## Why have a mission statement?

- ⇒ Communicates briefly and clearly the **fundamental purpose** of the organisation - both internally and externally.
  1. Who are you?
  2. What do you do?
  3. Who do you do it for?
  4. How do you do it?
  5. What do you value?

CANARI

## Why have a mission statement?

- Acts as a **yardstick** for decision-making and allocating priorities and resources.
- **Unites** everyone in the organisation around a common objective.

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## Qualities of a good mission statement

- Describes why you do what you do; why the organisation exists
- Simple and easy to understand
- Provides direction but does not prescribe means
- Makes it clear what is different about you from other organisations
- Wording and tone mirror the 'personality' or 'culture' of the organisation
- Says what you want to be remembered for

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## CANARI

- The mission of CANARI is to create avenues for the equitable participation and effective collaboration of Caribbean communities in managing the use of natural resources critical to development **through applied research, analysis, capacity building and advocacy**

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## Ideas for your mission

- Small group work
- Brainstorming
- Each group member finishes the sentence: "The mission should be..."
- Identify words & phrases that **must** be in the mission

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## What do you want to do?

Potential roles identified in June 2005:

- **Advocacy** role for sustainable tourism in Tobago - represent diverse stakeholders & provides credibility and voice for smaller groups
- **Facilitating / Capacity building** role – partners with & assists small groups to get grants, issues grants, provides training & technical assistance
- **Action** – undertake projects for sustainable tourism
- **"Policing"** force for sustainable tourism standards

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## Values & Culture

- **Values:** the organisation's **basic beliefs** and how it measure the **"rightness"** of its vision
- **Culture:** a way of doing things that enables the organisation to achieve its objectives, and a belief that it can be effective and have an impact (CANARI Guidelines 3)

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## Visioning "homework"

Individual reflection:

- How would you like to see the tourism industry in Tobago in the next 10 years?
- What do things look like?
- Who are the "players", what are the relationships, what are the policies and practices?

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## Travel Foundation (UK)

**Mission?**

- The Foundation aims to ensure that tourism from the UK gives a greater benefit to the people, environment and economy in destination countries.

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## Draft mission Travel Foundation Tobago

- The Travel Foundation Tobago promotes and facilitates socially, environmentally and economically sustainable tourism in Tobago that provides maximum benefits for the people, visitors and natural environment of the island.

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## Strategies

- **RESEARCH:** Analysing / identifying / M&E, measuring
- **FACILITATION:** Facilitating / mentoring / supporting
- **COORDINATION:** Steering / guiding / monitoring
- **DOING:** implementing
- **COMMUNICATION:** Catalysing / influencing / advising / voicing / **Representing?**
- **PARTNERSHIPS:** Networking / linkages

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## Creating your vision

Session 4

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## Why have a vision statement?

- provides a **guiding image of success**
- attempts to capture clearly for all stakeholders **the desired outcomes of the organisation's work**
- is **positive and inspiring**
- describes where the organisation sees itself in the **long-term** - 5, 10, 20 years or more into the future

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## Qualities of a good vision statement

- Expressed simply
- Easily understood
- Has full backing of stakeholders
- Inspiring and motivating
- Responsive to change

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## Vision vs. Mission

Vision	Mission
What success would look like	The raison d'être or purpose
e.g. Gilbert Agricultural and Rural Development (GARD)	
■ We see empowered young men and women on the cutting edge of a rapidly changing global environment.	■ To increase the living standards of young men and women through their involvement in agricultural and rural based enterprise.

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## Matura National Park Draft Vision (September 2005)

- North-east Trinidad is a biosphere reserve providing a green, clean and serene haven with Matura National Park as its core conservation area.

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## Visioning exercise

Small group work:

- Develop a "picture" of what (1) the organisation (2) Tobago would look like in 10 years if the organisation was successful

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## External scan PESTLE

Session 5

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## What are the external trends?

### PESTLE

- Political
- Economic
- Social
- Technological
- Legal
- Environmental

What are the trends in the UK travel industry?

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## Review of process of strategic planning

Session 6

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## Why plan?

“If you don't know where you are going, any road will take you there”  
(Koran)

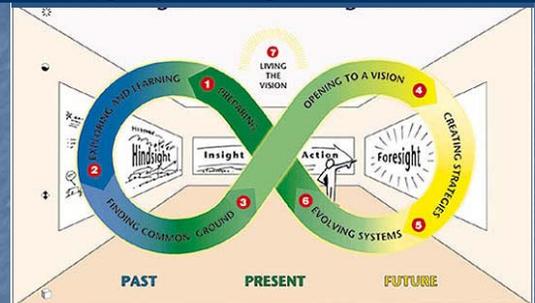
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## Why strategic planning

- Provides the vision of **where** the organisation is going over the next few years
- Establishes **what** you do and **why** (mission and values)
- Clarifies **how** you get where you want to go (realistic strategic goals & objectives for the planning timeframe)
- Provides the **basis for the action (operational) planning**
- Provides a base from which progress can be measured (**results measurement**)
- Enables the organisation to make the most **effective use of its resources** or to identify new resource needs
- Determines **priorities** and establishes **criteria** against which project opportunities can be assessed

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## Strategic planning



is a process and a frame of mind,  
not a one-off event

## Typical steps in strategic planning

1. Establish the scope of the strategic planning exercise:
  - \* How far back and how far forward will it look?
  - \* Over what period will it take place
  - \* What resources can you allocate to it
  - \* **Who will lead it**
  - \* **Who will be involved**

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## Typical steps in strategic planning

2. Establish the strategic planning framework
  - Stakeholder identification
  - Needs assessment (e.g. stakeholder, organisational)
  - Trends in wider environment (PESTLE)
  - Analysis of organisation's strengths, weaknesses, opportunities and threats (SWOT)

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## Typical steps in strategic planning

3. Conduct a review / evaluation of the previous period:

### What

- \* Were stated objectives met?
- \* What outcomes were achieved (what changed?)
- \* What were the specific outputs (e.g. publications)
- \* What processes were used / developed?

### How

- \* Perceptions and expectations of key stakeholders (interviews, focus groups, questionnaires)
- \* Independent evaluations (e.g. consultant, donor)
- \* Internal reflection and evaluation

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## Typical steps in strategic planning

4. Create or review mission and vision statements
5. Develop new strategic plan – strategic goals (and objectives)
6. Validate new plan with stakeholders
7. Implement the plan
8. Monitor and adapt the plan
9. Review and evaluate the plan

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## Elements of strategic plans

Foundation	Framework	Directions
Vision	Needs assessment (e.g. stakeholder, organisational)	Strategic programmes or goals
Mission		
Values		
	Trends in wider environment	
	Analysis of organisation's strengths, weaknesses, opportunities and threats	
	Stakeholder identification & analysis	

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## Pre-conditions for effective strategic planning

- Willingness to examine core issues (mission, strategies)
- Ability to reach consensus on philosophical issues
- Committed leadership
- Absence of crisis
- Technically competent staff
- Adequate time and resources
- Access to data to inform SWOT and trends analysis

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## Stakeholder identification & preliminary analysis

### Session 7

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## Stakeholder identification: why and how

- Critical precondition of building buy-in to decision-making processes
- Outline broad headings of stakeholders
- Then list individuals, groups and organisations

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## Methods for identification

- A range of methods can be used
  - Field observations
  - Literature reviews
  - Interviews with key informants
  - Informal discussions and meetings
  - Scientific and popular knowledge
- At every step, ask "*who is being excluded, who else matters, who have I missed?*"

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## Who is a stakeholder for a resource?

Stakeholders have <b>rights</b> to a resource if they:	Stakeholders have <b>responsibility</b> for a resource if they	Stakeholders have <b>interest</b> in a resource if they
<ul style="list-style-type: none"> <li>■ have a traditional link to it</li> </ul>	<ul style="list-style-type: none"> <li>■ undertake actions that change the nature of it</li> </ul>	<ul style="list-style-type: none"> <li>■ have a cultural attachment to it</li> </ul>
<ul style="list-style-type: none"> <li>■ depend on it for their livelihood</li> </ul>	<ul style="list-style-type: none"> <li>■ derive economic benefits or well-being from it</li> </ul>	<ul style="list-style-type: none"> <li>■ derive some enjoyment from it</li> </ul>
<ul style="list-style-type: none"> <li>■ own the land or access to it</li> </ul>	<ul style="list-style-type: none"> <li>■ are formally or informally managing it</li> </ul>	<ul style="list-style-type: none"> <li>■ are actively involved in its conservation</li> </ul>
<ul style="list-style-type: none"> <li>■ have been conferred rights via some legal mandate</li> </ul>	<ul style="list-style-type: none"> <li>■ have a statutory responsibility</li> </ul>	<ul style="list-style-type: none"> <li>■ have an intellectual association with it (e.g. through research)</li> </ul>

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## TF Tobago's stakeholders

Business	Chamber of Commerce
Agriculture	THA Division AMAE, Farmers Association
Environment	THA Division AMAE, ET
Tourism	Hotel & Tourism Association, Tour Guide Association, Incoming Tour Operators Association, THA Dept of Tourism
Marine	BRT, Fisherfolk Association, Reef Operators, SOS

➤ Are there other sectors/stakeholders?

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## Planning a participatory strategic planning process

### Session 8

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## Who are your stakeholders for planning?

- The individuals groups and organisations that will be affected by and/or should benefit from the outcomes of your planning processes
- The people, organisations and institutions that could influence and contribute to the planning processes

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## What does a participatory planning process look like?

- Involves stakeholders from the start
- Can be initiated by any stakeholder
- Can be simple or complex
- Non-linear – continually assessing and reassessing, identifying new players
- No set timeline

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## Participatory Approaches

### What are the values and challenges of participatory approaches?

CANARI Guidelines 4

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## Values of Participatory Approaches

1. Incorporates a wide range of perspectives and ideas, resulting in improved management
2. Improves the knowledge and skills of all stakeholders
3. Increases the likelihood of stakeholder support through involvement in decision-making
4. Can provide a forum for identifying conflicts between users and negotiating solutions to them
5. Can contribute to stakeholder empowerment and local institutional development, especially when the sharing of management responsibility is involved

CANARI Guidelines 4

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## Challenges of Participatory Approaches

1. Costly in terms of time & resources for all (including stakeholders)
2. Raises stakeholder expectations & can lead to disillusionment if realistic expectations not defined
3. Where capacity of stakeholders is lacking (skills or knowledge) it can be counterproductive and result in backlash
4. Not appropriate when issues are urgent or sensitive

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## Discussion on next steps

Session 9

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## Next steps in between workshops?

- Stakeholder perceptions & expectations study
- Sharing the draft vision & draft mission
- Analysing the external environment (political, economic, social, technological, legal, environmental = PESTLE)
- Internal scan of the organisation (strengths, weaknesses, opportunities, threats = SWOT)
- Evaluation of past work (evaluation of **outcomes** & **process**)
- Research governance structures & legal requirements

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## Next steps – workshops

- Begin a process of stakeholder analysis
- Examine governance structure & partnerships
- Refine mission & vision and develop objectives for the strategic plan
- Capacity building - Train participants in tools for implementation of the strategic plan (including development of an annual workplan with monitoring & evaluation)

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