

Understanding Project Management for Sustainable Tourism

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Foreword from Richard Pharro, CEO, The APM Group

Tourism is responsible for 9% of the world's GDP and constitutes approx. 260m jobs representing approx. 9% of total employment. This makes tourism one of the biggest industries and the figures suggest, that this will continue unto 2030 (Source: UNWTO 2014 and WTTC 2014).

Having said this, tourism remains one of the most challenging business activities. Seasonality, economic and political downturns impact both consumers and the range of tourism services offered. This creates significant challenges for project managers in the tourism sector.

Taleb Rifai from UNWTO points towards an important feature that tourism and its growth demonstrate; "to let tourism and culture grow, is not what you have but what you do with what you have". What you do with what you have is exactly what project management is about.

Project Management for Sustainable Development (PM4SD) provides a highly adaptive and flexible tool for quickly changing project scenarios embedded within a methodology dedicated to deliver long-term benefits. It works alongside formal project management approaches such as PRINCE2 and IPMA and complements processes and guidelines such as the Global Sustainable Tourism Criteria (GSTC) and European Tourism Indicators System (ETIS).

PM4SD helps stabilize and strengthen tourism to offer employment, earn foreign exchange and reinvent the destination when needed. It facilitates a common framework for co-operation and partnerships between different stakeholders such as national governments, marketing specialist owners of tourism infrastructure and transportation as well as host communities. It is tailor made for this unique sector and focuses on planning and delivering benefits beyond the project life cycle for all stakeholders. It enables both a top-down and bottom-up approach, which is key to sustainable development and growth.

This paper explores the central concepts of PM4SD and shows how it can contribute to strengthen the relationship between tourism and sustainability. I am very proud to have this new tool in our portfolio, especially as it fits well with APMG's agenda to contribute to sustainable development.



Richard Pharro
CEO, APMG International

Organization, structure and a clear orientation on product delivery are concepts that one is constantly reminded of throughout the PM4SD training workshops. My experience participating in the first PM4SD training has been inspiring both professionally and personally. Reflecting back on projects I have worked on, PM4SD methodology highlights the importance of roles and responsibilities at different project management levels, and the importance of planning and continuous monitoring and evaluation for a successful delivery of project outputs, always aiming for sustainability of actions and outcomes. This training on PM4SD has been enriching at a practical as well as theoretical level. I look forward to participate in the upcoming PM4SD Practitioner Course.

Zeinab Jeambey

Tourism Expert and consultant, Lebanon

Background

Too often, funding for delivering tourism and cultural projects has been spent without achieving any substantial results. The reasons behind this failure are commonly, related to the following project characteristics:

- Lack of a solid needs analysis.
- Poor planning and project design.
- Vague definition of objectives.
- Unclear roles and responsibilities.
- Bad stakeholder involvement.
- Inadequate monitoring and evaluation mechanisms.
- No integration of planning the delivery of benefits.
- Insufficient timescale.
- Scarce awareness of available tools and resources.

The methodology of PM4SD™ has been developed to empower project managers, policy makers and entrepreneurs with tools and techniques to better plan and manage funding and investment in the tourism context.

The methodology has been developed by the Foundation for European Sustainable Tourism (FEST) in partnership with JLAG, Leeds Metropolitan University, Network of European Regions for a Sustainable and Competitive Tourism (NECSTouR), as well as with a group of international experts.

FEST aims to support governments, academies and organizations to plan, deliver and manage tourism programs and projects with sustainability. It focuses on three key factors for tourism success and competitiveness: governance, leadership and management. FEST has recently set up a membership program open to organizations working towards sustainable tourism.

The main author was Silvia Barbone an international expert in sustainable tourism and management. She is an experienced project manager, and trainer and has been working with leading global organizations, such as UNWTO, UNEP, European Travel Commission, European Parliament, as well as local, regional and national public authorities. Silvia is part of the ETIS (European Tourism Indicator System) expert advisory group to the European Commission.

“I'm very enthusiastic about this course. I found it very useful and the future perspectives of this initiative seem to be very interesting! Teachers very nice, competent and accurate!”

Ana Isabel Rodrigues
Tourism teacher at the Polytechnic
Institute of Beja, Portugal

PM4SD and the difference it makes to the tourism sector

The complexities inherent in tourism; with its supply chains, ownership issues and participation from very different sectors, makes it a business activity with very special and multi-disciplined needs. PM4D makes one aware of the various internal and external stakeholders that are actively involved in the tourism sector and in the sustainable development field. This includes;

Public Sector:

- Local, Regional and Central Governments.
- Tourist Boards.

Private Sector:

- Tourism Industry.
- Construction Companies.
- Real Estate Investors.
- Industry Associations.

Host Communities and Intergovernmental Organizations:

- NGOs.
- Local and International Development Organizations.
- Local associations and interest groups.

PM4SD is a certified capacity building training scheme based on the principles of lifelong learning and sustainability. PM4SD empowers individuals, enterprises and organizations to:

- Bridge the gap between theories and project management realities.
- Integrate sustainability successfully within any type of project/ business initiative.
- Monitor and evaluate the real impact and benefits projects deliver.
- Initiate public-private partnerships and strategic alliances where appropriate.
- Develop authentic and responsible projects that deliver benefits for all stakeholders involved beyond the project life cycle.
- Become leaders for the future.

PM4SD is a specialized training scheme for organizations and professionals working in the tourism sector and beyond. The scheme is aligned with PRINCE2®, an internationally recognized project management standard and includes components specific to applying sustainable tourism policies and practices, and to implementing sustainable tourism criteria and indicators. This training scheme forms an important benchmark for competitiveness and growth in the tourism industry and the achievement of sustainable development goals.

PM4SD is especially relevant for project managers, policy makers, tourism organizations as well as associations, governments, construction managers, universities, training organizations, NGOs, researchers, students involved in small, medium and large tourism development projects.

The methodology has been developed to provide donors and implementers, organizations and individuals with the right set of skills, tools and methods to plan and deliver transformative and innovative projects and initiatives for sustainable development.

In essence this training tool will facilitate a better working environment and mentality for projects that are implemented between stakeholders from different working areas (e.g. public and private sector, but also coming from different thematic backgrounds e.g. culture, hospitality, agriculture, transport, etc.). PM4SD addresses the needs of businesses, destinations and host communities to plan and manage sustainable tourism initiatives and projects of any size. The approach is transparent and holistic, with a focus on delivering long-term benefits for all involved stakeholders.

“It has been a pleasure to share three intensive days with all the participants in the training. Very recommendable method to manage sustainable tourism projects. Hope to meet you again!”

Alejandro Gonzalez
Sustainable Tourism Project Manager
Eco-union, Spain

Benefits of PM4SD and how it addresses the business problems that it is designed for

PM4SD

- 1) Is a low-cost & high impact procedure.
- 2) Shows you how to capture funding opportunities.
- 3) Enables you to design, map and measure benefits.
- 4) Facilitates innovation and sustainability in tourism projects and destinations.
- 5) Ensures the delivery of transformative projects.
- 6) Easily adapts to any size, volume and context of a project (also outside of tourism).
- 7) Improves daily work in complex and often abstract team structures.
- 8) Creates impact at individual, corporate and destination level.
- 9) Brings in a new concept of quality in tourism, related to real “benefits” beyond the project life-cycle.
- 10) Inspires your thoughts and vision of sustainability.
- 11) Connects you with sustainable leaders.
- 12) Draws upon best practices and lessons learned.

The PM4SD scheme has also been created:

- To facilitate successful public-private partnerships in the tourism sector
- To ensure the exchange of lessons learned between all project stakeholders
- To help destinations and companies in designing their leadership in sustainability

The contribution of tourism to economic activity worldwide reaches 9% of global GDP. Nevertheless funding and revenues in tourism are lower, than in any other industry sector. This is due to the fact that tourism needs a multitude of stakeholders to create a tourism product/ destination. It is this feature of tourism that enables it to contribute to many different segments in a society and offer chances for several members of the community to actively participate and in the most ideal case to benefit from tourism development opportunities. It is therefore critical that projects and initiatives undertaken in this vital sector are managed effectively.

PM4SD has been designed to support various government objectives to stimulate competitiveness in the tourism sector and support sustainability, as this has evolved as the biggest challenge the tourism industry currently faces. The sector has not yet fully understood, that sustainable tourism is not a special type of tourism, but rather that all types of tourism must strive to be sustainable. In order to create sustainable projects and initiatives, a good management and planning method must be applied that will enable the tourism industry to include the sustainable principles into their decision making process and daily operations. The lack of such methods will have negative impacts, by causing environmental degradation, loss of heritage resources and social alienation (UNESCO 2013). Research carried out at European level by ENA (European Needs Analysis) has shown that there is a lack of a standard project management methodology at the implementation level. Therefore, an integrated management approach and tools, that take into account the specific characteristics of the tourism sector, are required to support the integration of sustainable management in tourism business. PM4SD fills this gap, by providing a structured method to plan and implement tourism projects.

Who is it designed for: Job roles and competencies

PM4SD is relevant for those working directly or indirectly in the management of tourism projects. The sectors involved are:

- Tourism and Travel.
- Construction.
- Transport.
- Government.
- Cultural heritage.
- Creative industry.
- Environment.

“The PM4SD trainings helped me to transform vague ideas and projects into concrete matter with a solid foundation. The PM4SD lessons provided me with a better understanding of project management that's not limited solely to tourism as the methods are applicable to other branches too. Besides the lessons, the fellow students were amazing. It is highly recommended!”

Sanne Crasn
ViaVia Academy, Belgium

The relevant roles are:

- Professionals involved in the daily management of tourism initiatives, such as master plans and planning processes, projects, programmes and strategies, for sustainable development:
 - Project & Programme managers and their team members.
 - Executives.
 - Project officers.
 - Project stakeholders within and outside of the core project.
 - Tour operators.
 - Audit, Evaluation and Monitoring Entities.
 - Academics & Universities.
 - Trainers.
 - Community developers.
 - Entrepreneurs.

- Professionals involved in decision making at a local, regional, national or international level in the fields of sustainable development;
 - Policy makers.
 - Project evaluators.
 - Public authorities.
 - Private companies.
 - Public-private partnerships involved in sustainable tourism initiatives and beyond.
 - Donor organizations.

PM4SD is divided into 2 levels of qualifications tested through exams:

1. Foundation Level
2. Practitioner Level

1. **The Foundation exam** is a closed-book exam, consisting of 50 questions. The Foundation exam is 40 minutes long and its pass mark is at least 50%, meaning 25 correct answers, out of 50. All exam questions are presented in a multiple-choice format with 4 options. To take the Foundation exam, candidates need to attend a PM4SD Foundation training course. In order to do so, they have to possess a degree in tourism, relevant experience and have excellent command of English.
2. **The Practitioner exam** is an open-book exam, consisting of 3 booklets:
 - a) Scenario Booklet
 - b) Question Booklet
 - c) Answer Booklet

The Practitioner exam has 80 questions and lasts for 2 and half hours. The pass mark is 50% (40 correct answers) for candidates and 66% for trainers (53 correct answers). To take the Practitioner exam, candidates must have passed the Foundation exam.

Candidates who pass the exams will be accredited, giving international recognition to the qualification and the candidate's knowledge and performance. Specifically for professionals having the PM4SD qualification means added value to their curriculum demonstrating that they have the skills to successfully manage and deliver sustainable (tourism) projects. Specifically for organizations having their staff with the PM4SD qualification they can showcase their commitment and their high quality standard in sustainable development. PM4SD qualification is fully acknowledged and considered as an add-on skill by donors and implementers as it demonstrates that the applicant/s are truly interested in delivering sustainable results and benefits beyond the project life-cycle.

This PM4SD training manual and course are long overdue. For many years donors and government agencies have funded tourism projects with the intention of making tourism more sustainable. However the objectives of the projects have often been imprecisely defined, sometimes very vague.

Prof. Harold Goodwin
Director of the International Centre for Responsible Tourism, UK

Exploring the benefits of the scheme and how it will enhance business performance

Overall PM4SD will help you to:

- Learn how to get funding for projects as it gives you a good insight into the decision making process of funding organizations.
- Use (sustainable) policies and official guidelines as a sound support for your project (application).
- Map, integrate and empower relevant stakeholders.
- Bring your project in line with relevant sustainable policies.
- Plan each stage and step of your project, initiative and destination with sustainability in mind.
- Understand the dynamics of a project where stakeholders from different working areas (e.g. public, private but also thematic areas e.g. hospitality, transport, gastronomy, agriculture, culture & heritage, education and training, etc.) are involved in.
- Guarantee project management competences and excellence.

In the process of implementing and managing a project PM4SD will enable you to:

- Transform ideas and vision into successful, innovative and transformative projects.
- Design and manage sustainable (tourism) projects.
- Apply sustainable tourism indicators profitably and methodically.
- Increase productivity.
- Monitor and transparently report how funding is spent.
- Network and communicate with key (tourism) players and stakeholders.
- Become a leader for sustainability.

The main aim of the scheme is to become an internationally recognized methodology to be used in tourism worldwide. It is a force for social, economic and cultural change, supporting the delivery of successful projects in a way that ensures benefits for everyone involved: visitors, local communities and stakeholders from the public and private sector. PM4SD aims to be the tourism project management methodology to go to, the same way PRINCE2® works for project management in general. Specifically, it aims at:

- Becoming the mandatory methodology for tourism and development projects.
- Incorporating the methodology within tourism and hospitality management degrees as a mandatory training.
- Promote and spread the methodology worldwide, particularly to destinations where tourism is a vital and important part of the economy.

Conclusion

PM4SD is the next step for individuals and organizations to contribute to the sustainable journey with focus on leadership and innovation: delivering transformative projects and activities for host communities, destinations and businesses. It demonstrates how to be the SMARTEST (Specific, measurable, achievable, relevant, timely and effective, sustainable and tested) in terms of implementing projects in the international arena of tourism and sustainable development. It addresses the major challenges of conducting professional project management in the fast paced tourism sector challenged by time, distance and resources available.

Further information about the scheme itself can be found at www.apmg-international.com, www.festfoundation.eu and www.pm4sd.eu

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