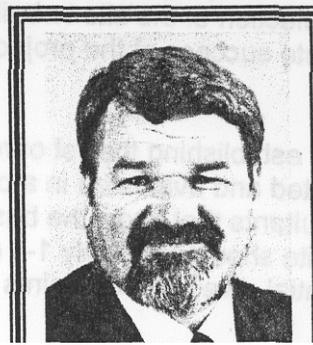


ECONOMIC AND ENVIRONMENTAL SUSTAINABILITY IN TOURISM ARE TWO IN THE SAME - A HOW TO CHECKLIST

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Biographical Brief

Ray E. Ashton, Jr. is a biologist, author and consultant with over **30** years experience in field biology, ecolodge development, natural areas and protected species habitat management, designing and leading international tourism programs, tourism marketing and project development, advising governments on operations and policy development, public education and museum and park design. Ray has worked throughout the **US** and in 39 countries worldwide.

PROGRAM OUTLINE (WITH SPACE FOR NOTES)

Some Steps In Sustainable Planning

The key to a sound business is a good business plan. The key to sustainability in the tourism business is thorough planning at all steps and phases.

✓ **PHASE I. Pre-development Planning**

- Step 1 - Establish a preliminary business or project plan.

The first step in developing an ecolodge, a tour, an attraction or a trail begins with the development of a well-thought out plan. The planned infrastructure, program, and costs must be based on the future market or clientele (visitors) which will use that facility or take that tour. The targeted clientele must be accessible for the facility or program to be marketed to competitively.

In Creating the Plan **You** Must Consider the Following to Determine Project Feasibility

- a. Who, What, When and Where –defining the product (ecolodge, tour, attraction or trail) and project parameters
- b. Cost-Income and economic goals
- c. Time frame / Scheduling

□ Step 2 - Preliminary Site Evaluation and Selection

Whether the project is building an ecolodge or attraction, or creating a tour or trail, the selection of the site to build on or sites to be visited is a primary factor in the ultimate success of the project.

After establishing the list of requirements a site will have to meet, locations should be listed and evaluated in a cost-effective manner. Be sure to use staff or consultants that know the business, the ecology, and resources required. The effort per site should take only 1-3 days on-site and in the general vicinity to determine the potential (we have 59 points we use to determine site potential).

- a. Define the site requirements or resource needs to meet the project goals (marketing, logistics, carrying capacity) and to meet the economic goals outlined in plan
- b. Identify the site potential and the cost for acquiring land or use of an area.
- c. Compare the long-term site potential with the current and future vulnerability of the area

⊖ Then - Evaluate each site and compare
(In your evaluation be sure to compare apples with apples when looking at sites)

⊖ Use a matrix (or series of matrices) to help objectify the evaluation process

A project may be judged feasible or un-feasible after each step. The first real test of feasibility after developing a feasible project plan is the feasibility in light of the actual site or sites that are available for project development. **Look for FATAL FLAWS** at each step of the process.

□ Step 3 - Site Selection

Based on the development of a Project Plan (Step 1), and the Preliminary Site Evaluation (Step 2) the actual site selection can be made. This selection will require a more in-depth look at the sites and a continuation of the Project Planning process with development of a more detailed Plan to guide the project. This will include a generalized Habitat Conservation, a Management and Monitoring Program, and a more detailed Market Analysis.

The sites which have been listed as showing a high potential should have an in-depth evaluation. As part of that evaluation, draft plans are created as part of the more detailed in-depth evaluation process.

a. In-Depth Site Evaluation (start with top three choices)

1. Availability and cost of the site; Current and Future
 - purchase or lease potential
 - current land use, surrounding land use

2. Program Evaluation and Plan
 - what does the site provide for the target clientele
 - how accessible, visible and marketable is the site
 - how durable (sustainable) is the site
 - how many people can use the site
 - what type of infrastructure and management will be required to provide this level of use (carrying capacity)

3. What will be required to sustain the habitat and resources that are required to provide the marketable experiences
 - program plan
 - marketable resources long-term potential
 - operations and maintenance, staff and costs
 - vulnerability, monitoring, environmental sustainability

b. Economic Evaluation of How Site and Project Plan work together - bottom-line vs. resource potential and vulnerability

This is where the “rubber meets the road”

1. Can the site be protected though the development of appropriate plan and still meet economic goals?

2. Can a marketable product with appropriate infrastructure, program and habitat management and monitoring be designed to meet the economic goals of the project?

✓ SITE SELECTION - MAKING CHOICES

What if:

- 4 The site has a potential carrying capacity that is **20%** above the projected long-term growth of the facility and the cost of infrastructure and program management is within costs. (**Also** experience is marketable).

- Great buy the place and go for it!

- ◆ The resources of a site cannot fulfill the needs of the planned facility or program because the projected carrying capacity is too low, then the following choices should be considered.

- **Go to the next potential site.**

Or,

- Evaluate program plan to see if non-impacting program choices can be developed that would meet the needs of the potential clients. (*off site activities, indoor classroom activities, etc*).

Or,

- Determine if building infrastructure, providing guides or other methods of controlling participants that expand carrying capacity is within the economic framework of the projected plan.

Or,

- Through good habitat management, the resource potential is expanded and would allow the program plan to adjust accordingly.

Or,

- Review the potential client base and marketing plan to **determine** if there is another way expand the market base by adjusting the type of activities (**e.g.**, fishing, canoeing and kayaking from a nature lodge which was just focusing on bird watching and wildlife viewing)

✓ **PHASE II. Development Planning**

Acquisition and Funding, Site Plan, Marketing **Plan, Program Plan, Operations and Management Plan** including a Monitoring **System**

Once the land to be developed or the sites to be visited are locked in, it is important to move into a second stage of the planning and implementation process. There are two steps at this stage. The first step, after there is some legal agreement in place to acquire the site, is to prepare a document that can be used to raise the required funding or investment for the project.

□ Step 1 – Master Plan

This document includes parts of the business, program, marketing, habitat management and monitoring plans. The primary purpose of this plan is to provide an overview of the entire project for obtaining funding and for public notification about the development.

For an ecolodge, attraction, or trail, the recommendations by the biologists for the proper infrastructure and locations of where the program should be placed should be used to create a visual plan of the site (created by a landscape architect that knows the business) and similarly a consultant who knows the business should develop a marketing plan that includes a carefully orchestrated calendar that is in tune with the development and opening of the facility. Also, the cost projections for developing such infrastructure should be estimated. For a tour itinerary the operator must now consider the details of creating a marketable and implementable system. It is important to plan the program and infrastructure for any tourism product with fee capture in mind.

The Master Plan should include:

- a. Complete Program Plan Outlining the Uses and Activities, Staff and Organization, Risk Management, and basic Maintenance and Operations
- b. A Site Plan (or itinerary) with placement of trails, facilities and natural features or major resources
- c. A basic Habitat Management and Conservation plan, as well as an environmental and habitat Monitoring system
- d. An annual budget
- e. A basic Marketing Plan
- f. A Schedule for Implementation

Use the Master Plan to Identify Investors, Locate Funding, or finalize tour for marketing.

□ Step 2 – Detailed Habitat Management and Conservation Plan and Monitoring System

The Detailed Habitat Management and Conservation Plan (HMCP) and the Habitat Monitoring System should be a separate document that can serve as detailed instructions for staff. This will be one of several "Operations" Manuals. The HMCP plan should be developed in cooperation with various state and federal agencies. This stage may also include a required Environmental Assessment (EA) or Environmental Impact Study (EIS) and may require various other studies or documentation for permitting purposes.

Before any construction is done, a monitoring program should be installed and a series of baseline data collected from which the impacts of construction, program and management can be measured. The monitoring system can be part of the HMCP for smaller, basic sites or it may be an extensive "how to" manual detailing seasonal and daily activities for staff for very large properties.

The Habitat Management and Conservation Plan should include:

- a. Site use plan
- b. Identification of Site Resources and Sustainable Limits
- c. Definition and Identification of Potential Impacts
 - construction phase
 - pre-operations
 - operations and maintenance
- d. Identification of applicable Regulations, Policies, or other Constraints
- e. Identification of Staff Responsibilities for Habitat Management and Monitoring
- f. A Monitoring System
- g. Baseline Monitoring Data
- h. Responsive Management Strategies
- i. Schedule for Management and Monitoring
- j. Alternative Conservation Strategies
- k. Potential Partners and Supplemental Resources

✓ PHASE III. Construction and Pre-Opening Operations

The Habitat Management and Conservation Plan should address the construction phase since this can be the most destructive phase of the project.

Construction or Destruction? When and Where and How of the construction must be planned to keep impacts within sustainable limits. The activities of the construction crew on the surrounding habitat can be among the most devastating impacts the site will sustain. Put constraints in the CONTRACT to protect the site resources and to train the construction workers to protect the resources you have worked so hard to identify and locate on the site.

Construction activities in conjunction with the seasonal conditions and needs of **wildlife** can have a serious impact on wildlife and must be considered. The only real way to determine impacts is to have on-going monitoring of the site. Some key issues to keep in mind:

1. Hire an architect, a landscape architect, and a contractor that understand sustainable infrastructure and development as well as the habitat and wildlife needs of the site as they interact with construction footprint.
2. Be sure that someone who knows the tourism business and who is fully aware of client needs is working with the architect and landscape architect in developing plans. (failure to plan for actual program use before the facility is designed is a common mistake and a costly one)
3. Plan construction schedule in a way that the facilities will be operational in time for the peak season, if not before.
4. Have strong conservation clauses in the contracts with builders and contractors. Be sure that infractions are tied to monetary loss to the contractor. Define the infractions carefully and provide training materials for contractor and builder staff to avoid the "I didn't know" excuse.
5. Key operations staff should be hired and trained several months before opening. Management and marketing staff should be operational at least 9 to 18 months prior to opening to assure a smooth and visible opening.

✓ **PHASE IV - Opening and Operations**

The key to maintaining sustainability is to adhere to the program, management and monitoring programs.

Appropriate staff must be available to conduct monitoring and to properly manage the site.

There must be a way to react to monitoring data and to adjust program and habitat management to sustain habitat management or, the long-term economic sustainability may be in jeopardy.

KEYS TO ECONOMIC & ENVIRONMENTAL SUSTAINABILITY -

- (1) THOROUGH PLANNING FROM THE BEGINNING**
- (2) SELECTION OF KNOWLEDGEABLE CONSULTANTS, ARCHITECTS, LANDSCAPE ARCHITECTS & CONTRACTORS**
- (3) WISDOM TO SAY NO TO UN-FEASIBLE PROJECTS**
- (4) CONSTRAINTS IN ALL CONTRACTS TO PROTECT ENVIRONMENTAL RESOURCES (ie. Marketable Resources)**
- (5) EARLY IMPLEMENTATION OF MONITORING AND HABITAT MANAGEMENT STRATEGIES**