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Evaluation procedures, competencies and learning
Report



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Evaluation procedures, competencies and learning

This report includes:

- The results of the review and consultation campaign regarding the evaluation procedures for the Sustainable tourism certificate;
- An assessment of competence and learning needs for evaluators linked to the EETLS;
- An inventory of related learning offered in formal education and training.

1) Review and Consultation Campaign regarding evaluation procedures for sustainable tourism certification

The review of the evaluation procedures for sustainable tourism certification was conducted in parallel with the review of the current initiatives in sustainable tourism certification and labelling, utilised for the revision of the European Ecotourism Labelling Standard (EETLS) as the review subjects are interlinked. Similarly the consultation campaign on the evaluation procedures run parallel with the consultation campaign for the EETLS revision as the two tasks shared the same target group. There were two phases of the consultation campaign involving in total 13 certification schemes.

Currently there are over 100 quality labels for tourism worldwide of which 20 were identified to have particular interest to this review as:

- a) they target accommodation, tour operators and tourism products
- b) they promote sustainable tourism or ecotourism
- c) they are widely known and respected in the tourism market

The project partnership sent an invitation for participating in the consultation campaign to this selection of 20 certificates of which 13 agreed to be engaged in the consultation process. The consultation process requested feedback from the certificates in the form of a structured questionnaire. Further explanations or clarifications were provided by emails or skype calls when necessary.

The majority of the certificates (10 out of 13) have an option for self-evaluation as the first step in the certification process for a business. Self-evaluation is viewed as an important step so that the business understands the certification requirements and checks initial compliance. Self-evaluation therefore has a screening role that allows the business to actually evaluate its sustainability performance.

The majority of the certificates (11 out of 13) provide some form of training or inductance course to the business prior and/or during the certification process. The training is mainly offered online and is complimented with workshops either online or physical. Physical workshops are offered by the certificates that have a national character or are represented nationally.

Consultation to the certified or under certification business is available by nearly all the certificates (12 out of 13). The consultation is delivered by either a network of consultants and specialists or by staff of the certification scheme.

Auditing of the business by a qualified evaluator is a part of all the certification processes reviewed. The majority of the certificates (9 out of 13) uses 3rd party evaluators, while the rest use evaluators from within their organisations. All the certificates facilitate on-site auditing at some point of the certification processes.

Most of the certificates (8 out of 13) have a complaints or an appeals procedure in place for the businesses, during and following the certification procedure.

The yearly average cost of certification to a business per varies substantially from certificate to certificate. Most certificates have different rates depending on the size of the business and the country located (if they are European/or International). The majority of the certificates charge per year a fee that ranges from 150-500 euros. Exceptions are certificates that are backed by governmental funding, where certification of businesses may be subsidised.

Certificates were also asked about future improvements that they wish to employ. The answers varied but can be categorised in improvement of criteria and their transparency, training provision for businesses, information to public on sustainability and monitoring of business performance post certification.

From the above review on the main evaluation procedures of the selected certificates we can highlight some important issues that are relevant with the development of the EETLS and of its evaluation procedure. A self-evaluation tool should be provided as a first step for the business in order to assess whether it can commit to the procedure or not. It is essential to provide to certificates or businesses a training package that will thoroughly cover the certifications topics and that would follow or accompany a self-evaluation step. Training should be available and delivered online and support during the certification process should be provided to businesses. On site auditing at some point of the certification procedure is the preferred methodology. A complaints or an appeal procedure is regarded as essential. Finally the annual certification cost should be relevant to the size of the business.

2) Competence and learning needs of evaluators including reference to those for EETLS

Competencies can be divided into two categories: general and specific. General include those that are related to personal attributes (e.g. ethical, fair minded, observant, diplomatic, self reliant, etc.), skills (e.g. organisation, record keeping, communication, prioritising, presentation), to a limited respect knowledge (e.g. general awareness of cultural norms and customs, the ability to judge what is relevant and correct based on experience or learning) and in some cases conflict management. There are excellent documents giving general needs for evaluators (e.g. ISEAL Alliance, 2007; ISO Auditor training Course, 2004; various web sites), for a list of these based on ISEAL Alliance 2007, see below. More specific courses are available within the EU for evaluators (14 in 2007) and include general competencies, but also more

specific ones related to their aims (e.g. Travel Life, Green Globe, etc. or more general ones available through Universities, Further Education and other accrediting bodies).

The competencies required for the EETLS fall within this latter category with both general and specific competencies needed for the evaluators and for the businesses wishing to self-evaluate their operations. These include being able to thoroughly understand what the criteria mean, how to source supporting information to enhance their understanding and how to use it to evaluate the outcome. Although the general competencies should come from their own inherent abilities and skills and / or previous training, the specific knowledge and skills required may need further education and training. Various tools can be employed in this process including: education packages related to specific outcomes, questionnaires, checklists, discussions, positive and negative feedback, mentoring, etc.

The following sections provide a list of both general and specific competency requirements along with suggestions/links including training material developed for this project and evidence that this knowledge and/or these skills have been acquired / met. A summary of general characteristics is given below, but for a full list of general competencies see ISEAL Alliance, 2007. Specific competencies related to EETLS are dealt with in more detail below.

General Competences include Attributes and Skills are listed below (See ISEAL Alliance, 2007).

Personal Attributes

Personal Attributes (Assessed through interviews, personal statements, references and actions)	Proof of achievement
Ethical (fair, truthful, honest, sincere, discreet)	
Open-minded (willing to consider alternative view points)	
Diplomatic (including good social skills, tactful, able to resolved conflict)	
Observant (actively aware of physical surroundings and activities)	
Perceptive (instinctively aware of and able to understand situations)	
Versatile (adjusts readily to different situations)	
Tenacious (persistent, focused on achieving objectives)	
Decisive (reaches timely conclusions based on logical reasoning and analysis)	
Self-reliant (acts and functions independently while interacting effectively with others)	
Professional (approaches work in a conscientious manner with good time management skills and reliability)	
Personal integrity (will stand up to injustice or wrong doings)	

Specific Skills: Competencies are listed in the first column with relevant training material provided by the ECOLNET project in the middle column. The final column states the proof that would be required for the competency to be achieved.

Competency	Competency linked to learning needs: (Materials provided from ECOLNET project)	Proof of achieving learning needs
Plan and organise work effectively including prioritising tasks	See: Training Package 4 –Evaluator Training: Personal Skills, Unit 4.1	Assessed through education, work experience, references, interview and evidence of having worked through the relevant Training Package(s) where appropriate
Documentation of work, including tasks undertaken and appropriate record keeping	See: Training Package 4 –Evaluator Training: Personal Skills, Unit 4.1	As above
Team membership, leadership and facilitation (able to work as part of a team, leadership and management skills where appropriate, ability to assist other teams where necessary)	See: Training Package 4 –Evaluator Training: Personal Skills, Unit 4.1	As above
Using resources in a sustainable manner	See: Training Package 3 – Sustainable Business Practice, Units 3.1 – 3.6	As above
Communication (good verbal and written communication skills)	See: Training Package 4 –Evaluator Training: Personal Skills, Unit 4.1	As above
Data gathering (including awareness of and experience in various sampling techniques, selection of relevant information, analysis)	See: Training Package 4 –Evaluator Training: Personal Skills, Unit 4.1 and Training Package 2, Unit 2.3	As above
Maintain data security	See: Training Package 4 –Evaluator Training: Personal Skills, Unit 4.1	As above
Interpretation and discussion of results (including relating them to other published work)	See: Training Package 4 –Evaluator Training: Personal Skills, Unit 4.1	As above
Report writing and presentation	See: Training Package 4 –Evaluator Training: Personal Skills, Unit 4.1	As above

Knowledge

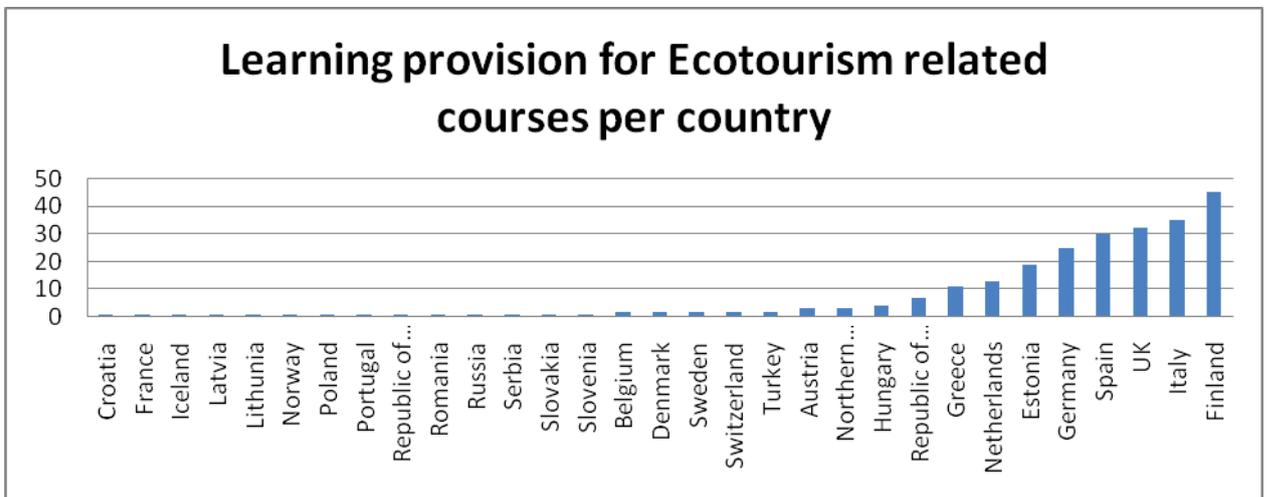
Competency	Materials and/or Input required	Proof
Understanding the criteria of EETLS and how it works	See: Training Package 4 –The EETLS, Unit 4.2	Evidence of having worked through the relevant Training Package(s) where appropriate
Culture & natural environment	See: Training Package 1 – Unit 1.12 Supporting Biodiversity; Unit 2.1 – Meeting Customer Demands; Unit 3.2 - Environmental Legislation and Codes of Practice	Assessed through education, work experience, references, interview and evidence of having worked through the relevant Training Package(s) where appropriate
How businesses work	See: Training Package 1: Units 1.2 – 1.12	As above
Sustainable tourism (Environmental and Business continuity)	See: Training Package 3: Units 3.1 – 3.6	As above

As noted above, these competencies are addressed in the relevant training packages developed for Work Package 4 as well as being assessed by evidence from work experience, references and interviews.

3) Inventory of related learning offer in formal education and training (post-secondary and tertiary) and non-formal learning in the participating countries

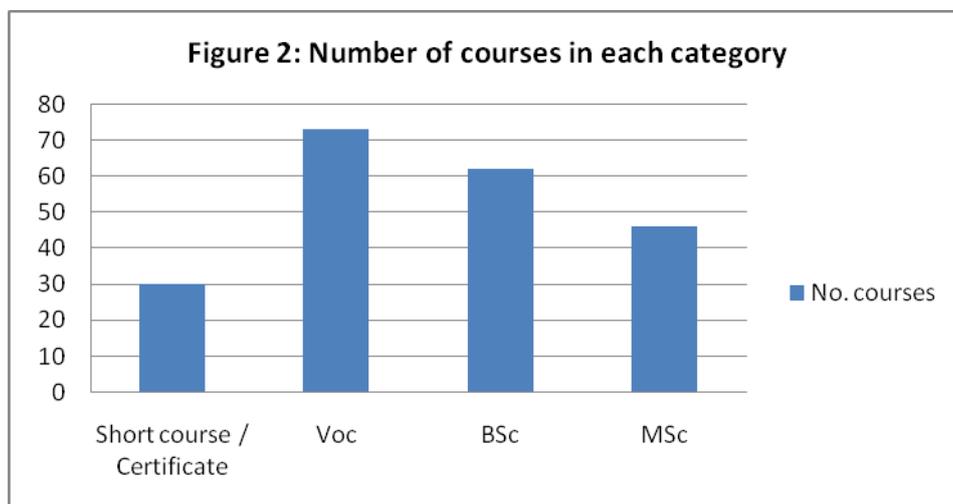
A total of 256 course listings were gathered from 12 EU countries (Estonia, Finland, Germany, Greece, Hungary, Italy, Northern Ireland, Portugal, Republic of Ireland, Romania, The Netherlands, UK) resulting in listing of over 168 degree or short courses at vocational, BSc/BA and MSc/MA level (See Appendix 1). The spread of courses is given in Figure 1. These courses represent a sample of what was available on line or through personal contact in the 12 countries from December 2010 to October 2011.

Figure 1: Learning provision for Ecotourism related courses in Europe.



The breakdown of the courses examined is shown in Figure 2.

Figure 2: Number of courses in each category.



Although some of the entries only include the course title or even provider, many include course title and module details. These were further analysed in an attempt to understand the range of courses available and their relevance to the EETLS. In the first instance, this involved a key word analysis of course titles.

Course Title Key Words Analysis

The key words as reflected in the course titles are listed in Table 1. The most common key words are tourism, sustainable tourism, ecotourism, tourism management, leisure, rural tourism, enterprise, management, sustainability and environment. Development linked courses are also common.

Table 1: General Key Words derived from Training available throughout Europe with number of times it appeared in a title

Key word	No.	Administration	2	Contemporary Tourism	1	Interactions	1
Tourism	60	Adventure Tourism	2	Economic	1	International Focus	1
Sustainable Tourism	33	Agritourism	2	Effects on Biodiversity	1	Labelling standards	1
Ecotourism	18	Business	2	Enhance Conservation	1	Local development	1
Tourism management	18	Conservation	2	Environmental Science	1	Local Environment	1
Leisure	17	Environmental Management	2	Ethical issues	1	Motivations	1
Rural Tourism	13	Ethics	2	Ethical tourism	1	Mountain	1
Enterprise	12	Guide	2	Financial Savings	1	Policy	1
Management	11	Intern'l Tourism Development	2	Free for Jobseekers	1	Protected areas	1
Sustainability	11	Natural & Cultural Environ	2	Global Environment	1	Regional planning	1
Environment	8	Natural Environment	2	Global Trends	1	Social responsibility	1
Responsible tourism	6	Planning	2	Green Actions	1	Socio-economy	1
Cultural tourism	4	Rural	2	Green Credentials	1	Strategic& practical support	1
Destinations	4	Accessible Tourism	1	Green start	1	Sustain Ireland	1
Green Tourism	4	Accommodation	1	Growth	1	Sustainable Future	1
Rural development	4	Award Winning	1	Impact of Tourism	1	Sustainable Practises	1
Sustainable Development	4	Awareness and Management	1	Improve Sustainability	1	Tourism planning	1
Development	3	Biodiversity	1	Increased Revenue	1	Tourism products	1
Environ protection	3	Catering	1	Industry	1	Tourism research	1
Local development	3	Concepts and Philosophies	1	Industry Focussed	1	Training	1
Recreation	3	Conservation Management	1	Industry Perspective	1	Wildlife Tourism	1
Tourism development	3	Contemporary Concerns	1	Influences	1		

Module Content and Short Course Analysis

A further analysis of course content provided a list of over 1000 modules/short courses. These were summarised into key words and classified into the number of times a specific words occurred in the group as a whole as well as within the four levels of study. Tourism/touristic were the top key words with over 308 citations followed by management/managing with 87. The results are given in Tables 2 and 3. Additional frequently used words are given in column three of Table 2. The term Ecotourism appeared in 18 module / short course titles.

Table 2: Key words appearing in module titles more than 5 times (all modules combined)

Key words appearing 6 - 10 times	Key words appearing 11 - 25	Key words appearing more than 25
Conference	Commercial	Nature / natural
Enterprise	Finance / Financial	Economics / Economy
Guide / Guiding	Products	Market / Marketing
Organisation / Organisational	Accounting	Culture / cultural
Public / Public relations	Impacts	Tour Operating
Resource	Global / Globalisation	Development
Responsible tourism	Travel	Manager
Social Responsibility / Social Accounting / Social	Hospitality	Business / Business skills / activities
Sustainable development	Methods	Environment / Environmental
Brand	Sustainable tourism	Management / Managing
Countryside	Geography	Tourism / Touristic
Customer	Policy / Policies	
Entrepreneurship	Sustainably / Sustainability	
Local development	Strategic	
Organization / Organizational theory	Ecotourism	
Regional	Macroeconomics	
Strategy / Strategies / Strategic	Various sporting / leisure activities	
Business administration	Destination	
Energy	International	
Field / Field work / Field Trip	Languages (various)	
Hotel	Research	
Human Resources / HRM / HR	Planning	
Operational / Operations		
Rural tourism		
Event		
Law		
Leisure		
Rural		
Science / Scientific		
Service / Services		
Sport		
Advertising		
Communication		
Heritage		

Table 3: Key words, all module titles, appearing five or less times (all modules combined)

Accommodation	Disabled	Interpretation / Interpretive	Restaurant
Activity	Disaster	Investment	Risk
Administration	Diseases	ISO	Routes / trails
Adventure	Diversification	Itineraries	Rural communities
Advice	Drink	Labour	Rural development
Agency	E business	Land use	Safety
Agriculture	E Commerce	Landscape	Sales
Agrimanufacturing	E tour/ tourism	Leadership	Sector
Agritourism	Eating	Learning techniques	Skills
Airports / Air	Ecology / Ecological	Legal	Small business / SME
Alternative	Ecosystems	Legislation	Society
Analysis	ECPAT	Livelihoods	Socio - economic
Andragogy	Education	Local people	Sociology
Anthropology	Employment	Maintenance	Spatial
Assessment	Engagement	Managing organisations	Speaking
Beverages	Ethics	Mathematics	Specialisation
Biology	Ethno	Media	Spiritual tourism
Botany	Evolution and Taxonomy	Merchandising	Stakeholder
Building / Built	Experiences	Meteorology	Statistics
Business opportunities	Festival	Micro economics	Strategic planning
Business tourism	Fire fighting	Modelling / model	Study
Career	First Aid	Mountainous	Supply / Suppliers
Carrying capacity	Flora and Fauna	Multicultural	Supply chain / suppliers
Case studies	Folk art	Multivariate	Sustainable management
Catering	Food	Municipal	Team
Certification	Foreign	National	Techniques / Technologies / Technical
Citizen	Forest	National Park	Theme parks
Civil	Front office	Natural products	Theory
Climate Change	Fund	Nature based	Ticketing
Coastal and Marine	Geo-demographic	Nature conservation	Tools
Commodities	Geoinformation	Network	Tour Operations & Tourism Distribution Channel Management
Community / Communities	Geology	Niche	Tourism development
Community based	Geotechnology	Olympic	Tourism services
Company	GIS	Outdoor	Traditional knowledge
Competiveness	Governance	Package	Traditions
Computers / Computer skills	Grants	Participation / Participatory	Transport / Transportation
Concepts	Green tourism	People	Travel guides
Conflict resolution	Group	Politics / Political	Trends
Conservation	Habitat	Poverty alleviation	Tutoring
Consultancy	Handicrafts	Practice / Practical	Understanding and Managing People
Consumer	Hazards	Pricing	Urban
Contemporary Issues	Health	Principles	Value

Accommodation	Disabled	Interpretation / Interpretive	Restaurant
Contracts	Health and Safety	Project	Visitor
Conventions	Heritage tourism	Protected Areas	Visitor Attractions
Cooking	History	Psychology	Waste Management
Corporate	Housekeeping	Qualitative	Water
Cost	Human	Quality	Web design /Web
Country / Area specific	Hygiene	Quantitative	Well being
Creative Industries	ICT / IT	Recreation	Wholesalers
Creativity	Identification	Regional development	Wildlife
Cross-cultural	Industry	Relations	Working environment
Data	Informatics / Information	Remote Sensing	World wide
Demand	Innovation	Responsibility/ Responsibilities	Writing
Differentiate product	Internship	Responsible Self- Management	

In a further comparison the overlap between the four levels of studies with relation to topics as represented in the key words is considered. Many of the key words given relate to practical skills, such as guiding, marketing, entrepreneurship, business skills, hospitality, managing/management, but topics that would add to a wider knowledge and experience were also included such as policy and planning, nature, environment, development, rural, global / globalisation, etc. Overall there is a wide spread of courses throughout Europe relating to tourism, sustainable tourism and ecotourism offering both specific skills and general knowledge. **However, no single course throughout Europe analysed in this exercise provided the skills and knowledge required to meet the criteria of the EETLS. This verifies the role of the ECOLNET project, and specifically the easily accessible training material that it will produce.**

It must be noted as stated earlier, that this exercise represents the courses taught as listed on the web and from other sources between December 2010 and September 2011. Although it provides a useful list of common words as shown by existing courses, and can guide someone into general topics, no guarantee can be made that the courses examined are still being taught. However, by using the key words provided in the appropriate search engine or web site, it should be possible to find similar courses that are currently available.

Finally the results were analysed for overlap between the four levels of study with key words that occurred three or more times.

Table 4: Key words appearing three or more times in modules at the 4 levels of teaching (vocational < 6 months, vocational > 6 months, BSc/BA, MSc/MA. (Key words that appear in more than one group are highlighted in bold. Sample sizes are shown in the brackets.)

Vocation less than 6 months (n = 62 modules/short courses)	Vocational more than 6 months (n = 197 modules/ short courses)	BSc / BA (n = 438 modules)	MSc / MA (n = 357)
Development	Country / Area specific	Communities	Analysis
Market / Marketing	Culture / cultural	Accounting	Brand
Rural	Culture / cultural tourism	Advertising	Building / Built
Sustainable	Customer service	Business / Business skills / activities	Business / Business skills / activities
Tourism / Touristic	Development	Business administration	Civil
	Ecology	Communication	Commercial
	Economics / Economy	Conference	Culture / cultural

Vocation less than 6 months (n = 62 modules/short courses)	Vocational more than 6 months (n = 197 modules/ short courses)	BSc / BA (n = 438 modules)	MSc / MA (n = 357)
	Environment / Environmental	Countryside	Data
	Guide / Guiding	Culture / cultural	Destination
	Hospitality	Destination	Development
	Languages (various)	Economics / Economy	Economics / Economy
	Management	Enterprise	Ecotourism
	Market / Marketing	Entrepreneurship	Energy
	Nature / natural	Environment / Environmental	Enterprise
	Sustainable development	Event	Environment / Environmental
	Sustainable tourism	Field / Field work / Field Trip	Geography
	Tourism / Touristic	Finance / Financial	Global / Globalisation
	Travel	Fire fighting	Heritage
	Various sporting / leisure activities	Food	Human
		Geography	Impacts
		Global / Globalisation	International
		Heritage	Landscape
		Hospitality	Languages (various)
		Hotel	Legal
		Human Resources / HRM / HR	Leisure
		Hygiene	Local development
		Impacts	Macroeconomics
		Industry	Management / Managing
		International	Manager
		Interpretation / Interpretive	Market / Marketing
		Investment	Methods
		Languages (various)	Modelling / model
		Law	Nature / natural
		Leisure	Operational / Operations
		Management / Managing	Organization / Organizational theory
		Manager	Participation / Participatory
		Market / Marketing	Planning
		Nature / natural	Policy / Policies
		Operational / Operations	Politics / Political
		Organisation / Organisational	Pricing
		Planning	Products
		Policy / Policies	Project
		Recreation	Protected Areas
		Research	Psychology
		Responsible tourism	Public / Public relations
		Restaurant	Qualitative
		Rural	Regional
		Service / Services	Research
		Sociology	Resource
		Sport	Rural
		Strategic	Science / Scientific

Vocation less than 6 months (n = 62 modules/short courses)	Vocational more than 6 months (n = 197 modules/ short courses)	BSc / BA (n = 438 modules)	MSc / MA (n = 357)
		Sustainable tourism	Sector
		Tour Operations & Tourism Distribution Channel Management	Social Responsibility / Social Accounting / Social
		Tourism / Touristic	Socio - economic
		Travel	Strategic
			Strategy / Strategies / Strategic
			Sustainably / Sustainability
			Techniques / Technologies / Technical
			Tour Operating
			Tourism / Touristic
			Transport / Transportation

It can be seen that there is some overlap with the **Vocational modules** emphasising **skills** while the **BSc and MSc** cover more **theory** as well as **practice** as stated above.

There are clearly a good variety of courses and modules available at the present time, but whether they are accessible to the people who would be interested in the EETLS is another matter. Hence the role of the ECOLNET project outputs is valuable and should be widely advertised to businesses and potential businesses to facilitate uptake.

References

ISEAL Alliance (2007) Evaluation of Auditor Competence.

ISO 9001 (2000) Auditor Training Course and Form ©2004 ISO 9000.