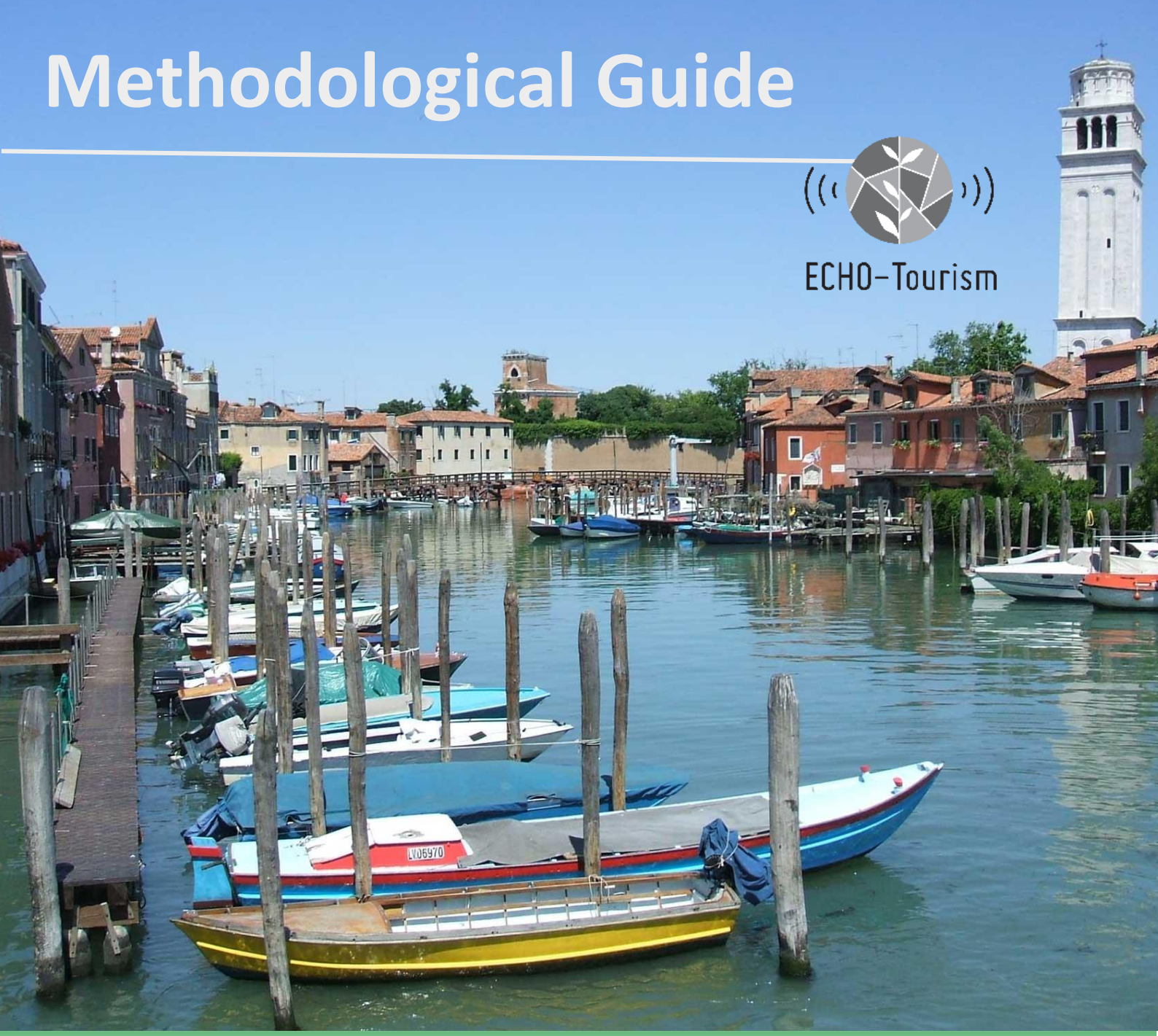
Methodological Guide

ECHO-Tourism



« Manual of adaptation and transfer of ECHO-Tourism on territories »

With the support of the Erasmus+ Programme of the European Union

ECHO-Tourism

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ECHO-Tourism is a transnational training project for adults adapted to the tourism sector. The role of the partners at the origin of the project consists in reinventing, scaling up, an awareness-raising system for eco-gestures and sobriety practices existing in France. Their commitments:

- provide tools adapted to tourism stakeholders wishing to engage in or promote eco-responsible approaches;
- promote the transfer of the initial model to other territories and other sectors of activity.

This guide aims to formalize and frame our project management methods with the aim of disseminating them. The methodology should allow future project leaders to benefit from the feedback acquired during the experiment, but also upstream. We thus wish, through this intermediary, to support them in reproducing similar challenges or eco-action projects in their own territories.

How to optimize the use of the guide ?

The methodology presented is built, by feedback, on the basis of practical knowledge and actions carried out for years in France, but also in partner countries.

It can be followed step by step. You can also choose to consider only certain aspects. She wants to be as adaptable as possible. It is therefore important, when you use it, to consider the progress of your project. The guide is divided into two parts:

- a part of theory presenting axes of reflection to help you to organize the construction of your project;
- a practical part presenting the systems tested in the different partner countries of the ECHO-Tourism project in order to illustrate the application of this guide.

We wish you well reading,

Project partners

SUMMARY

PART 1 : TRANSFER METHODOLOGY

Foreword

The evolution of individual behavior is essential to act on the energy and environmental transition of territories. It is up to our whole society to evolve and adapt to change. Everyone has their role to play. Every action counts. Even the most innocuous! Our approach towards a questioning and a generalized transition of our daily practices is based on the following ideological triptych:

- prioritize essential needs and services. Notions of **sobriety and frugality** ;
- favor adaptable and efficient solutions in order to limit its impact on a daily basis;
- enhance and preserve the resource in the territories and favor solutions with the least harmful impact on the environment.

Our approach to the ecological question during our training and awareness-raising actions with the general public is therefore based on :

A non-anxiety and non-guilt-inducing discourse

a dual approach in the process of transmitting know-how and interpersonal skills :

- by promoting the adoption of knowledge through experimentation and the daily application of sustainable practices ;
- by favoring the transmission of theoretical contributions during events, training sessions and appropriate tools. We promote the construction of a playful and entertaining framework of activities to promote the transfer of skills and the appropriation of good practices.
- By reaching audiences in different walks of life. We invite each participant to act in a pro-environmental way, both at home and at work or vacation by promoting the transfer of environmental practices between spheres of life.

The five pillars of the approach

1 - The bilateral approach to the transfer of good practices is adapted to tourism stakeholders: participants are invited to adopt sustainable practices both in the private and professional spheres. A study recently carried out by the ADEME (French Environment and Energy Management Agency) has proven that an individual is more likely to get involved in a professional capacity when he has already experienced these same practices at home or otherwise.

2 - The transversality of the modes of exchange and training in good practices is adapted to broader activity horizons. We deal with a greater diversity of eco-responsible themes and subjects covered: addition of concerns related to waste, mobility, water resources, heritage.

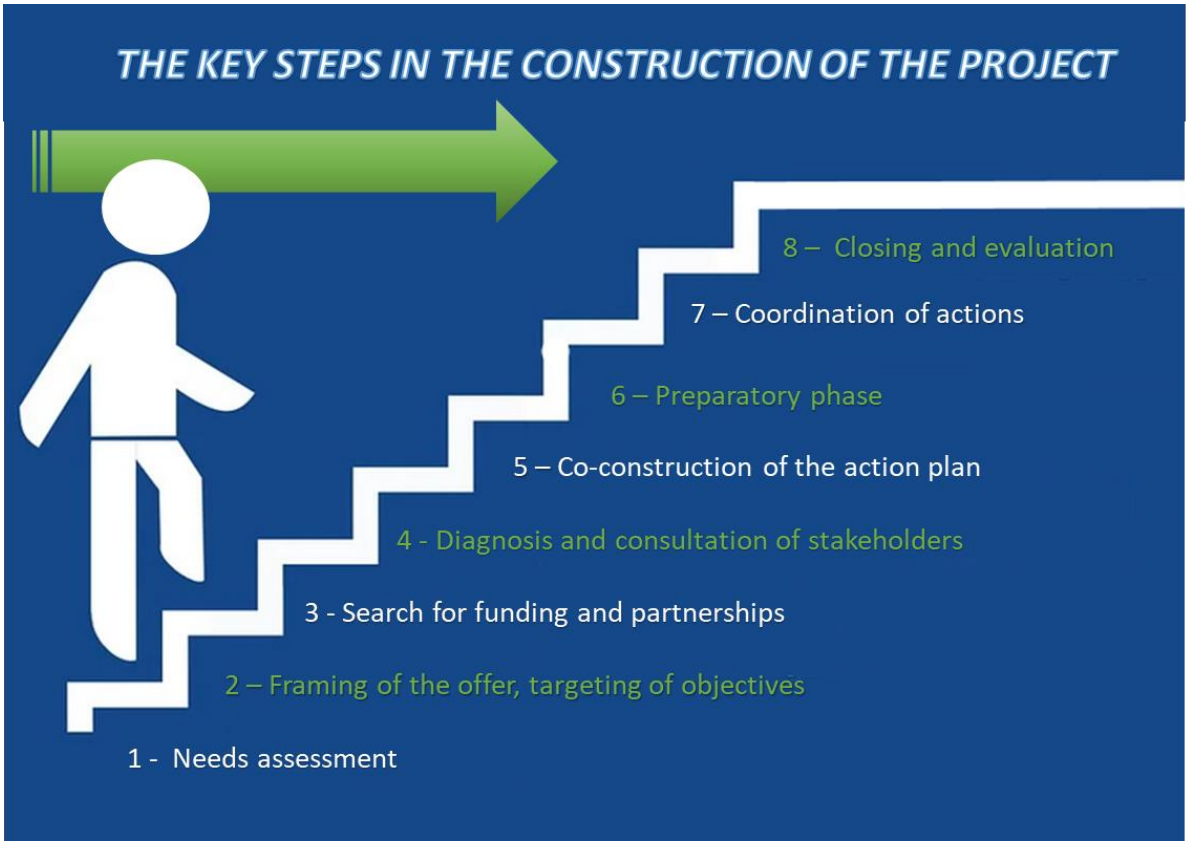
3 - Adaptation of this methodology by assimilating feedback.

4 - The help and support provided to the internal coordinators of the project to build the framework conducive to the involvement of tourists, but also professionals in the sector. Up to the support of voluntary environmental initiatives in establishments.

5 - Test the system at different stages of its construction with tourism professionals in order to be able to offer tools adapted to their practices / priorities / needs.

General aspects of a classical eco-actions project

An eco-action can be defined as: "any action or activity within a program whose primary purpose is to produce a positive impact on the environment". The program or **action plan** responds to identified needs and to a list of **objectives** that must be evaluated to validate the achievement of a goal, a need for change at the very origin of the global project. As with any type of project, we will find different constants that must be considered:



STEP 1 : ASSESSMENT OF NEEDS AND DEMAND

1.1 / Understand the territory and its challenges

Against the background of economic, environmental and societal constraints, the development of territories must respond simultaneously to multiple challenges: identity and attractiveness, quality of life, social inclusion, integration and the fight against inequalities, development and dynamism of economic activities, services to the population and demographic issues, environmental protection, etc. These are all topics that should be considered when developing your project. Feel free to compile them as a **list** or **mind map**. This will help you in a second time to prove the interest and the scope of your future actions.

1.2 / Identify the needs of the actors on territory

The analysis of specificities of the territory must go through an identification of the public and the actors directly or indirectly impacted by the implementation of the project.

To simplify the analysis, we can divide these different types of actors into interest groups. It is a question of positioning oneself as a beneficiary of the system, that is to say of putting oneself in the place of the target audiences, to best consider their expectations.

You can favor **direct contact** with the actors of the territory to carry out the collection of this information. Field surveys and/or making personalized appointments represent potentially time-consuming substantive work. Do not hesitate to use, in parallel, investigation tools such as **surveys or online survey forms** that will allow you to collect a lot of information indirectly.

Mobilize your network and the actors of the territory by engaging in a joint work of reflection that can be supported by as many people as possible. Take care ! It will not be a question of organizing reflection groups, but rather of individually questioning all the stakeholders in the future project. Your main task will therefore be to organize the collection of this data and the compilation of the results.

TIPS : Limit yourself to answering the main subjects distinguished so as not to get lost in the assessment of needs... The more precise the identification of the needs you will meet, the more you will be able to propose an offer that can convince and please.

Three typical public profiles will be identified:

Prescribers

These are the agents of the territory, the communicators, the centers of information, advice and training. They are all intended to promote and enhance the development of the tourism sector. They will represent relays of skills or different levers of action. It is up to you to identify the most appropriate way to mobilize them at each stage of the project.

Tourism professionnals

Understand how their structures work, identify their points of interest, appreciate their availability… so many elements to consider before you start writing the project.

Tourists

What are tourists looking for on vacation? What will be their availability: how much time will they be likely to grant you to participate in the actions? What will be the most opportune moments and levers to find and mobilize them?

This requires a working knowledge of the terrain. Innovative methods such as the "PERSONA method" are particularly suitable for illustrating and organizing this kind of reflection.

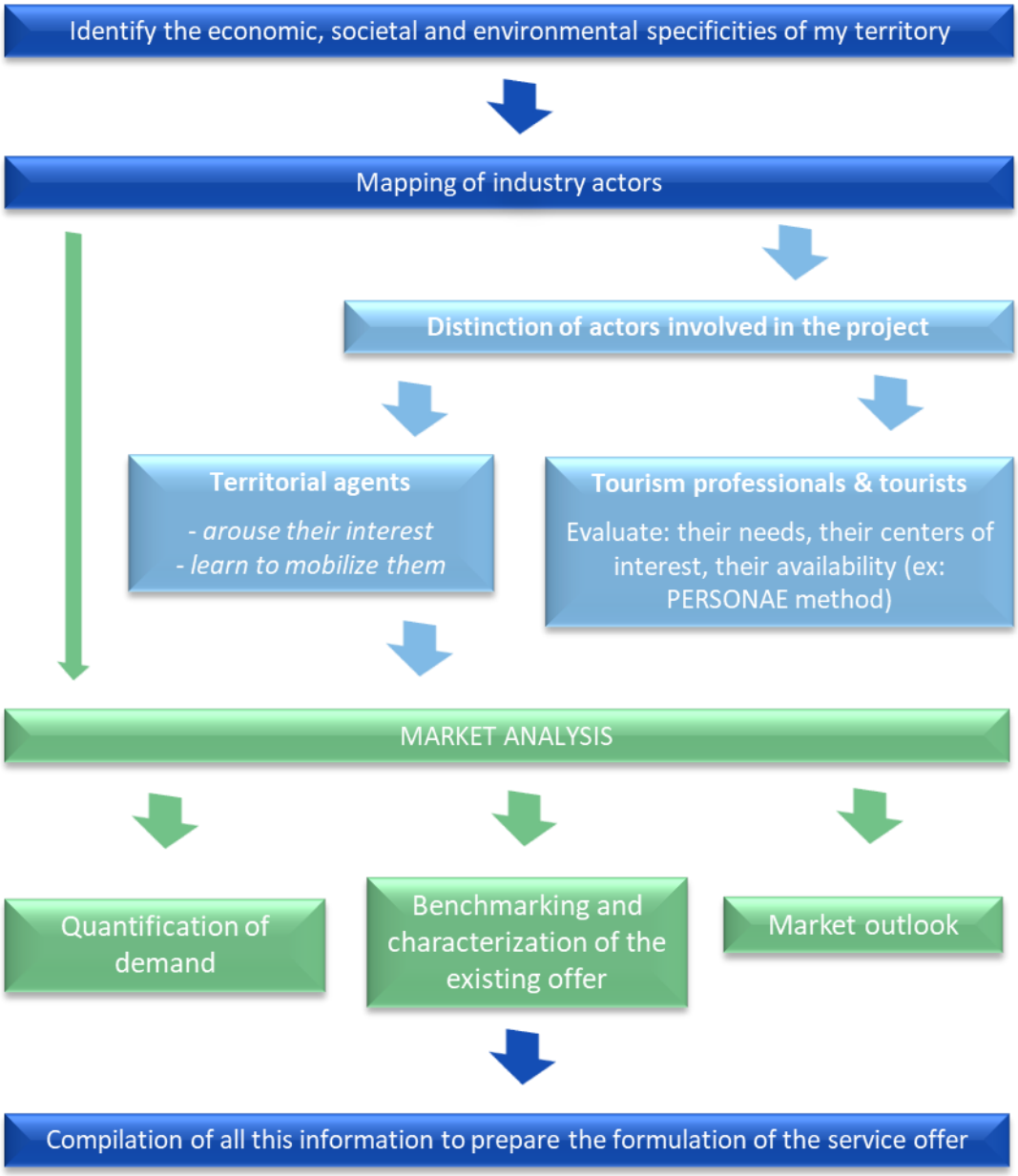
1.3 / Market analysis

After having identified the specific needs of the territory in which you wish to operate, you will have to start defining the nature of the service that you would like to offer to the different audiences identified. A market analysis work will have to be carried out in order to obtain a clear idea of its functioning. This is an opportunity to position yourself as a provider.

“Market research” is work intended to analyze, measure and understand the functioning of the forces at work within the framework of a market. Many educational and methodological tools have been developed to understand and implement this type of strategy.

Diagram N°1: ASSESSMENT OF NEEDS AND DEMAND

Even before building the ECHO-Tourism support offer adapted to my territory, I undertake observation work aimed at appreciating and understanding the problems and constraints that I will face in order to meet the specific needs of the actors in my territory. Here is a summary of the steps to consider during this first step:



Here are several important things to think about when undertaking this task:

Axis No. 1: Quantify demand

Quantitatively and qualitatively evaluate the need expressed and measured during your survey work. Figures will allow you to support your argument and market your service more easily.

Axis No. 2: Benchmark

Knowledge of similar services and/or devices already existing in the territory will allow you to position yourself with full knowledge of the facts. For information, there are different types of benchmark analysis :

The "internal" benchmark: This consists of studying the internal functioning of the departments of your structure, before trying to inspire you with best practices observed elsewhere.

The "competitive" benchmark: This consists of comparing your service offer with direct competitors or other players...

The "functional" benchmark: This consists of taking inspiration from existing processes and/or supports (human resources management, administration, logistics, etc.) in order to adapt ideas likely to improve its offer.

Axis No. 3: Assess the prospects for market development

Axe N°3 : Evaluer les perspectives d'évolution du marché

What are the possible development prospects in the short / medium / long term?

STEP 2 : FRAMEWORK, FORMULATION AND CONSTRUCTION OF THE OFFER

2.1 / Project's objectives

We define two similar concepts, but important to differentiate, during the development of a project.

The *"aim"* of a project is the overall definition of the changes you want to achieve with respect to the identified needs. It is about sharing common information with the rest of the stakeholders so that they, in turn, gain an overview of the work you intend to accomplish. This means asking the following questions:

- What needs identified during the assessment of the request does my support offer meet?
- What changes do you want to bring and achieve for the community?

An *"objective"* characterizes the nature of some or all of the changes that one wishes to obtain within the framework of a project. It is a statement of what you want to accomplish through one or more activities.

To help you write them, you can memorize the acronym **"SMART"** which refers to a management concept defined in 1954 by Peter F. Drucker:

***S**pecific:* an objective must be simple and specific enough to be understandable by the people concerned, but must also have legitimacy in the eyes of all;

***M**easurable:* it must be quantifiable or qualifiable;

Performance thresholds and value scales are defined to allow the objective to be assessable. It simply helps to judge the relevance of the work carried out;

***A**mbitious:* It must be shared by all and remain ambitious. It must represent a motivating challenge. It must be achievable while remaining reasonable and achievable to ensure everyone's buy-in. The attractiveness of the goal will allow its acceptance;

***R**ealistic:* It must aim for a level that will motivate the greatest number of participants and avoid the abandonment of certain participants as the objective progresses;

***T**ime-bound:* We define a deadline and possibly intermediate dates.

2.2 / Choice of beneficiaries

2.2.1 / Define the characteristics of a target audience

We define a list of criteria that make it possible to characterize the public that we wish to reach or to whom we wish to address. This collected information can be classified according to different criteria, such as:

Personal characteristics

- Age range
- Gender
- Nationality
- Family situation (number of individuals in the household, presence of dependent children,)
- Marital status (de facto spouse, married, etc.).

Socio-professional categories

– School degree and level of qualifications

– Trade, profession

– Annual income level

Habits and lifestyles

- Hobbies;
- Consumption habits ;
- Living place
- group, community or organization belonging.

All this information makes it possible to characterize the conditions under which it will be possible to reach each beneficiary profile, by defining:

- the ideal time to make contact;
- the most suitable means of communication to reach them (the ideal communication channel such as telephone, email, social networks, etc.);
- the best way to capture their attention and address them.
- This will help you define the most appropriate way to build your offer, in terms of resources to be mobilized, planning and schedule of actions.

2.2.2 / Needs of a target audience

Studying and taking into consideration needs expressed means being able to adapt your offer to potential participants according to their :

- **involvement** in the construction of the offer: are future beneficiaries at the initiative of developing the offer? Is the project a result of the will of a citizens group. If so, were they invited to participate in its development? If not, are there plans to include them in the process during this reflection phase of the project?
- **level of appreciation, knowledge and experience of the system: Did the target audience already have the opportunity to participate in this type of action?** Quel est le niveau de sensibilisation du public vis-à-vis des problématiques et questions auxquelles le projet souhaite répondre ? Quels sont les valeurs partagées par ce public ?
- economic, legal and/or administrative situation (for legal persons)… Will the public concerned be able to benefit from the actions undertaken?

Listening to the needs of an audience is a key point to consider in formulating an offer that can meet specific expectations.

2.3 / Action plan draft

2.3.1/ Build a first version of the action plan

At this stage of the project, we define in detail the way envisaged to carry and animate the device. This work of reflection can be undertaken using the method of:

« Five W's » : *Who, What, Where, When, Why ?*

2.3.2/ Identify actions – « What, Why »?

What will be the nature of the actions taken? What will be the reasons for their implementation?

The answer is simply to be found in the work of reflection carried out during the previous stages. Your work will therefore be limited to structuring and responding to the issues and points of interest previously established. Built to meet specific needs, these different measures can be classified. The idea will be to prioritize actions that contribute the most to achieving the targeted objectives. It will be necessary to describe the content of each action while remaining concise. The construction of "ACTION SHEETS" is a simple solution to implement.

2.3.3/ Identificate means that can be mobilized – « Who » ?

This step aims to identify the **human and material resources** used and the budget to be allocated for the implementation of the action plan. It will be necessary to ensure that the pursuit of the objective does not exceed the threshold of mobilizable resources. It is therefore at this very moment of the project design that it will be most relevant to gauge its technical feasibility.

In particular, it will be a question of designating, in a factual manner, the means that will be assigned to carrying out the actions.

2.3.4/ Define execution periods and deadlines – « When / Where » ?

Actions are located in time and space. While some tasks are assigned to respect a provisional schedule and meet very specific deadlines, others are organized periodically. This is the challenge of this phase: planning the date, duration and frequency of the assigned tasks in order to once again ensure that the objectives are met.

2.3.5 / Assess success criteria – « How / How much » ?

Defining success criteria and factors means ensuring that the result of the action is in line with the original intentions. It is therefore wise to define numerical indicators, a starting value, in order to obtain a point of comparison. This aspect is detailed below.

Respecting the **budget allocated** for the implementation of the action plan can be, for example, one of these analysis criteria.

2.3.6 / Writing of action plan

Although there is no ideal way to proceed, it may be easier at first to opt for an action plan established in the form of a **task distribution table** which can then be reinterpreted in the form of a **calendar**. This action plan should be succinct and easily understandable. In addition to the action plan, we can produce mission sheets assigned to group leaders, containing more information on the content of their missions..

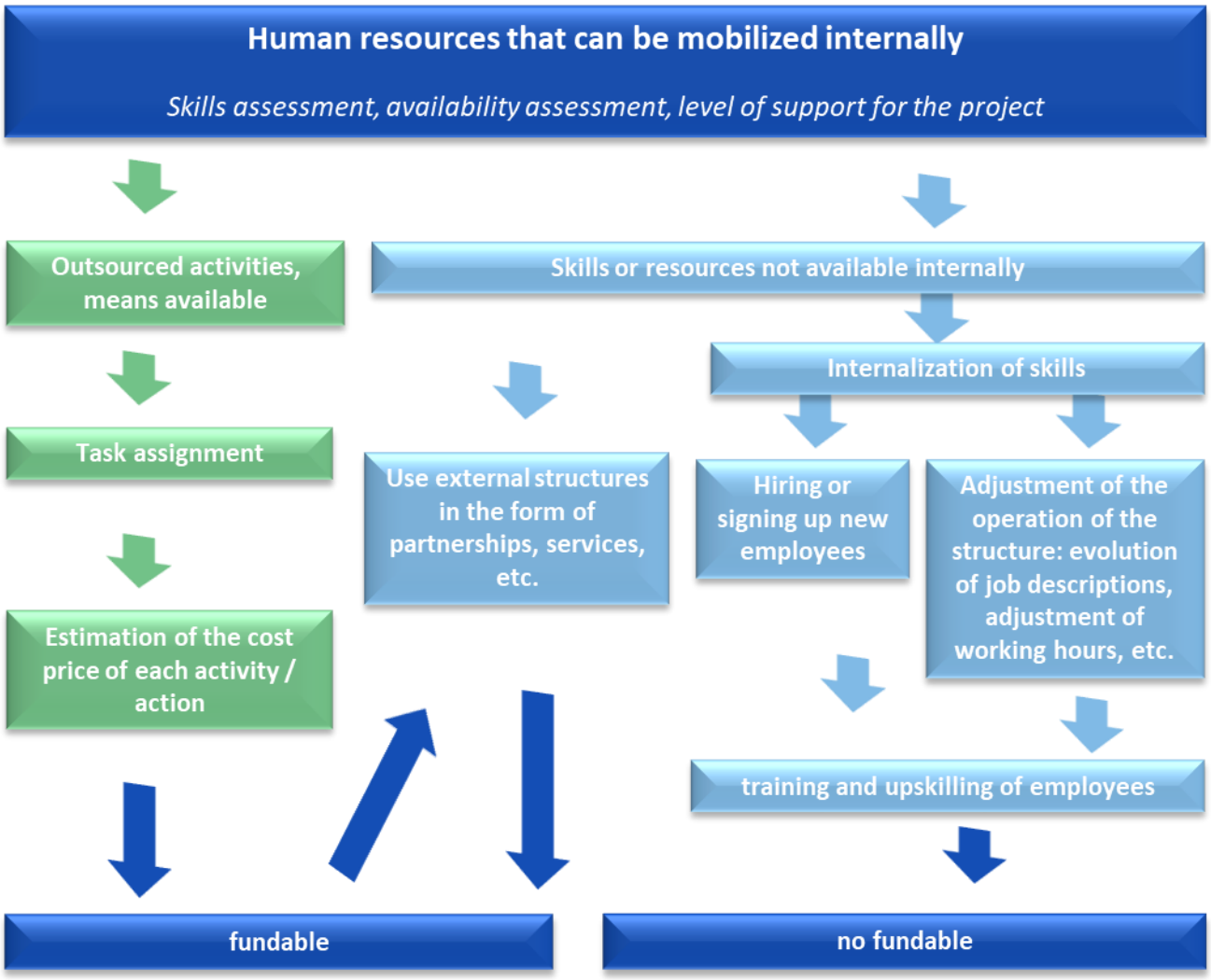
2.4 / Resources and skills assessment

Before you even start building your service offer, you will need to be able to estimate and identify all the resources that will be mobilized during the implementation of the project. You will be able to size your service with full knowledge of the facts. You will have to draw a parallel between the resources that can currently be mobilized internally and the resources necessary for the proper conduct of the project.

2.4.1 / human resources

Establish an initial assessment of the human resources available in my structure in terms of skills, availability, aspirations…. From this first assessment, you will be able to assess all the tasks that could be carried out internally by your structure.

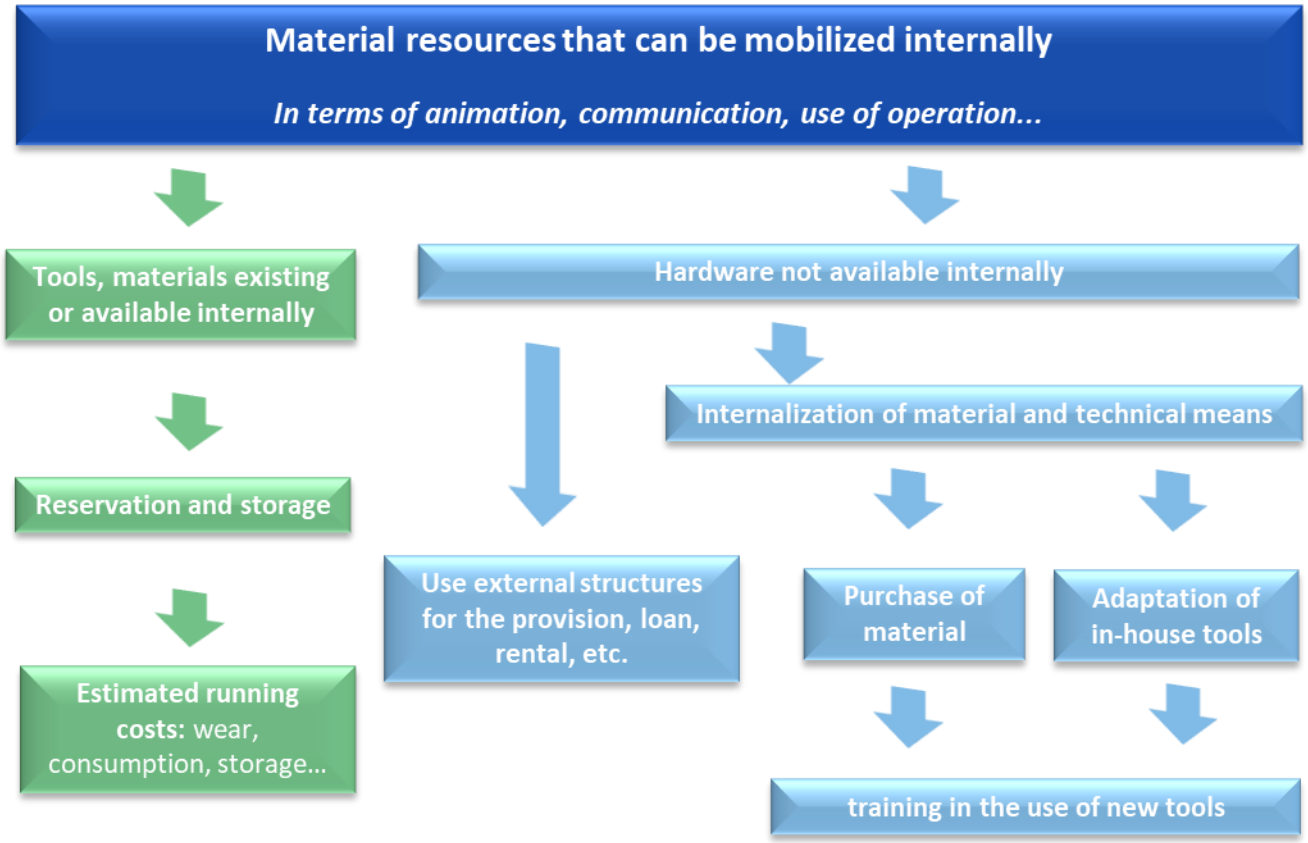
For all the tasks that you cannot answer directly, you can consider approaching the question in different ways. The diagram below will help you make your choice.



When the relevance of the choices of action is called into question by the realities of internal functioning, the simplest solution to foresee will probably be the adjustment or revision of your initial objectives. This will undoubtedly be the least risky solution financially. it will not always be justified to wish to internalize all the services or activities necessary to achieve the objectives.

2.4.2 / Material and technical resources

The approach will be equivalent for the estimation of the technical and material resources to be mobilized. We will ask ourselves similar questions: Do we already have the tools in-house? Should we create them, acquire them or rather rent them? For what budget and under what conditions? Different aspects should be considered when acquiring equipment: how long will it last, what are the possible uses, can it be shared or used for other projects? So many questions to be answered.



2.5 / Dissemination and communication strategy

The communication plan parallels the structure of the overall assembly of your project. Be careful though, he follows his own goals.

I - Diagnostic

1,1 - Environment analysis

1,2 - Meeting and listening to stakeholders

1,3 - Communication objectives

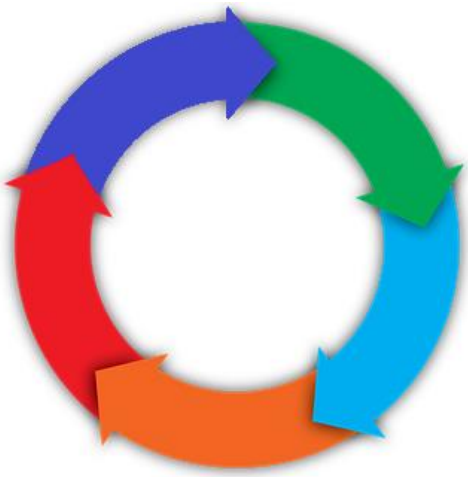
II - Plan

2,1 - Communication strategy

2,2 – Target public

2,3 –Tools choice

2,4 – Actions plan



III - Create

3,1 – Message design

3,2 – Visuals design

3,3 – Contents development

IV - Communicate

4,1 – Deploy the campaign

4,2 – Deploy the actions plan

V - Evaluate

5,1 – Evaluate results

5,2 – Drafting of balance sheets

5,3 – Make adjustments

2.6 / Task Duration Estimation

Why define and cite the nature of these tasks at this stage of the project? It is mainly a question of evaluating the time and the means which will be devoted to the realization of the actions. It is not necessary, at this stage of development, to establish a precise timetable for the course of actions. This can be done later after consideration of the needs expressed by your future partners, funders or participants.

The ideal timing of intervention for the implementation of actions to reduce consumption will largely depend on: the environmental themes and issues addressed, the sector of activity concerned, etc. If you wish to address the theme of heating, for example, it will be preferable to plan your activities during the winter period or in mid-season. The theme of food can be discussed throughout the year. You'll need :

- consider the time needed to mobilize the necessary human, material and technical resources;
- define dates of key events to organize your agenda accordingly ;
- define periods and durations for carrying out actions and impose deadlines for completion.

To help you assess the duration of the various tasks to be considered when setting up a project of this type, we have provided a non-exhaustive summary table of the tasks to be considered below.

Project progress	Task
1 - Needs assessment	Territory diagnosis
	Consultation with the actors of the territory
	Benchmarking
	Compilation of information collected
2 - Framing of the offer	Analyze needs of the target audience
	Drafting of the project - Actions plan - Skills assessments, inventory management - Budgeting and pre-costing
3 - Search for funding, creation of partnerships	Prospecting
	Responses to tenders, grant application
	Drafting of partnership agreements
4 - Diagnosis and consultation of stakeholders	meetings
	Awareness actions
5 - Co-construction du plan d'action	Drafting of the project *- Assignment of tasks, construction of the project team* *- Budgeting and costing of actions* *- Planning of tasks, events...*

6 - Preparatory phase	**Supports, materials and tools** *- Purchasing, rental, establishment of supplier listings* *- Preparation, adaptation, rehabilitation, construction* *- Inventory and supply management* *- Budget management*
	Events and animations *- Organize the implementation of the communication plan* *- Preparation of events* *- Creation or adaptation of animations*
	Project team and collaborators *- Assign missions* *- Awareness and training actions*
	Recruitment of participants *- Sensitization* *- Registration* *- Training in the use of tools*
7 - Coordination of actions	Launch of actions
	Consumption monitoring
	Animation time, action tracking
	Intermediate exchange time *- Meetings* *- On-site interventions*
8 - Closing & assessments	Closing of actions
	assessments & prospecting

Depending on the nature and progress of your project, you will not be subject to the same time constraints.

In practice, to carry out a ½ day animation, we will add ½ day for the preparation of the material and the transport and 1 day of additional time for the coordination (mailing, various exchanges…) and the production of the supports. That's 2 days of work in total! The time spent coordinating actions is often underestimated. In general, this time is considered equivalent to 40-70% of the total time spent on the project.

Care should be taken when evaluating the task *"Responses to calls for tenders; application for subsidies"*: the time spent writing the documents can become time-consuming, with no guarantee of success.

2.7 / Business plan and financial strategy

It is a question here of: pre-costing, budgeting of actions, evaluation of the financial resources that can be mobilized and analysis of operating costs. Funding needs are assessed based on work previously completed. You are now ready to produce a first draft of the budgets to be mobilized for carrying out the actions. Some questions should be asked:

What will your funding strategy be? When will you need to raise funds to carry out the actions? Can these periods be flexible?

Here is an indication of the main existing **financing methods :**

- crowdfunding;
- self-financing;
- the use of a loan from a bank or a third party;
- leasing;
- **public aid and subsidies:** calls for projects or calls for expressions of interest at different territorial levels (local, state, European Union aid, etc.);
- **alternative resources** such as: barter, exchange of services, loan, pooling means… This list is none exhaustive.

Do not hesitate to draw up your own list of the different types of funds that can be mobilized. The most relevant choices will be inherent to the legal form and the values carried by your structure.

Consider the evolution of the business in the long term and the expected returns on investment:

Will the approach be sustainable or viable in the long term with regard to the operating costs of my structure?

Can this initiative lead to the development of potential outlets, to an opening of the market?

STEP 3 : FINANCES AND CREATION OF PARTNERSHIPS

Analysis and research of funding sources

The search for financing can be carried out before or after the production of the offer. It depends on how the support offer was constructed. Is the offer the result of a specific request? Will the partners have been identified even before its development? In any case, the search for financing will be an integral part of the process of carrying out your business plan.

Research and construction of partnerships

The construction of partnerships can meet several objectives. We consider three particular forms:

- *The financial partnership:* the primary goal will be to obtain a capital contribution necessary to finance the actions. In return, an agreement in principle on the achievement of results will be ratified;
- *The collaborative partnership:* the interest will be to collaborate in the realization of the workload incumbent on the good realization of the project. We pool the skills of each structure while sharing a common goal of co-construction;

- *The portage partnership:* the objective is to free oneself from the production of certain tasks by transferring responsibility to a third-party structure through an agreement of agreements and principles. This partnership can be likened to a service or a subcontracting mission. We talk about partnership, because it is a question here of creating a relationship that can be lasting.

Your missions as coordinator or initiator of the project, during the construction of these different partnerships will be to:

- assess the needs requiring the construction of possible partnerships;
- search for potential partners;
- coordinate the exchanges and the work of reflection prior to the creation of the partnership;
- write the conventional document(s) binding you with the other project stakeholders;
- define the responsibilities attached to each person;
- promote the definition of the objectives and purpose of the partnership.

Communicate to present the approach

To present the offer, the information meeting is the most suitable means of communication. This exchange aims above all to prepare the ground and to answer the questions of the interlocutors. The information can also be disseminated, downstream or upstream of the exchange, to all staff by means of posters, printed summary documents (flyers) or other internal communication tools. In order to make exchanges more fluid, it is not useless to provide common supports and tools to offer to your employees.

STEP 4 : DIAGNOSIS, CONSULTATION OF STAKEHOLDERS

Once the stakeholders have been integrated into the project, you will need to collaboratively redefine or validate the results of the work produced in the previous stages. This reflection work must define areas for improvement to be made to the functioning of your action plan, or your offer in a more general way. It is important to consider the opinion and expectations of all the stakeholders who will be impacted by the actions. It will be necessary to solicit directly or indirectly: your funders, your partners, your collaborators, your future prospects.

Consultation of internal stakeholders on the assessment of their practices, needs and expectations

Understanding, knowing and understanding the expectations of stakeholders is a key success factor for sustaining and developing activities. The issues of this analysis are as follows:

- know the most appropriate way to meet the expectations of the audiences targeted by the actions;
- make its offer adaptable to the evolutions and needs of the actors of the territory;
- guarantee the quality of relations and collaboration between the various stakeholders;
- promote the involvement and support of the various stakeholders;
- to know the perception of the actors vis-a-vis the prospects for change identified;
- identify existing and valuable practices;
- identify the brakes and blockages related to the dissemination of good practices;
- identify the expectations of agents and teams present in the field. This amounts to identifying the technical and functional problems that are effective in the field.

Where and when to retrieve the specific characteristics of the target audience?

This can be done **indirectly**, on the basis of a precise identification of their profile. You can obtain this information through your funders or partners who will have already carried out this evaluation work beforehand or through your collaborators who will have practical knowledge of the field. It is also possible to retrieve this information **directly.**

Here are some ways to explore:

- sales or meeting points (during the act of sale/service, during professional outings such as a trade show, thematic forums, tastings, etc.);
- online tools/software;
- traditional customer service channels: by phone, email or post.

Data recovery can be done over a more or less long period according to your needs, on an ad hoc basis, or renewed. Depending on the scope and volume of the work to be undertaken, it may be envisaged, for example, to commission a trainee and/or an apprentice to carry out this substantive work. This will provide him with a global vision of how project management works. He will be brought to exchange with all the actors. He will have an external view of the current functioning of the establishment.

STEP 5 : REVISION AND CO-CONSTRUCTION OF THE ACTION PLAN

5.1 / Use of diagnostic results

Data collection, on good practices, on the obstacles and levers to avoid, should allow you to draw up a strategy for the implementation of an action plan acceptable to all. To ensure the support of the actors involved in the process, the coordinator will have every interest in setting up group discussions on the issues highlighted by the diagnosis. The groups will preferably be open to the greatest number of volunteers (or to the referents already identified during the diagnosis). After presenting the results, the objective will be to reflect and then deliberate on the priority actions or possible modifications to be implemented.

The development of the action plan can be carried out in parallel with step 2, when a quantity of data deemed sufficient has been collected.

It may be wise to remind everyone of the context in which the project takes place and to redefine the objectives it intends to meet.

5.2 / Identify actions – « What, Why »?

The nature of the actions to be carried out to meet the objectives and needs of the target audiences is defined. It will be useful to produce action sheets on which all the information intended for the various identified target audiences will be grouped together.

5.3 / Build the project team – « Who » ?

Responsible persons should be assigned to supervise the work to be carried out. They will ensure the proper implementation and compliance with the conditions previously defined.

5.3.1 / Present the approach to my collaborators and partners

Many possibilities will be available to you to discuss with your employees your desire for change. It will not necessarily be a question of going directly to the heart of the matter and/or the action. To present the approach in its best light, it is preferable to gradually establish a climate conducive to discussion and introspection.

To avoid losing the attention of a disparate and uninformed audience, it is preferable not to disseminate information that could be of a guilt-inducing or anxiety-inducing nature. This promotes engagement with your audience. Everyone gives the best of themselves and plans more for the future if the outlook is favorable to them. The best compromise is to present initiatives that have been observed in other territories, in establishments similar to yours, for example. The second part of this guide aims to present this type of feedback to you.

The presentation of the approach can be done during thematic events such as conference-debates, forums, corporate events. This can be organized around the screening of a film, the promotion of a product or service, the arrival of a committed/professional speaker, a management approach and/or by updating provision of informative documents. It will be preferable to plan time for internal discussions during working hours rather than in the evening, if this is possible and acceptable by the hierarchy.

5.3.2 / Identify the internal relays and the sensitivities of each

It will be relevant to identify in advance the role that can be assigned to each person before assigning and distributing tasks. This step will allow you to identify the resource actors and relay people to lead the development of the project and the implementation of the actions. This may be an opportunity to re-examine the management and organization model of your project. This work will facilitate social dialogue within the team. Everyone will be asked to ask themselves:

- business development prospects;
- changes in working conditions: adjustments to working hours and conditions, assumption of responsibility;
- his aspirations and prospects for professional and professional development: training prospects, personal investment burden, agreement with the values of the structure, etc.

The employees who will invest in the process will have to find an interest in it, whether personal or professional. The accomplishment of each will necessarily go through a time of consultation. The choice of preferred method for setting up these consultation times will largely depend on the internal organization of the project team. The collection can be done in such a way:

- individualized or collective;
- formal or informal;
- direct or indirect.

It is up to you to take these aspects into consideration when choosing the solutions available to you. For small projects for example (less than 10 employees), for the sake of simplicity, we will favor live exchanges in an individual and informal way. Be careful, do not neglect the time that can take the drafting and sending of a questionnaire.

5.3.3 / recruitment : organize a project team

This mobilization work requires a lot of time and energy. It is often preferable to assign a single person or a small group to coordinate the management of exchanges and the construction of collective work.

5.3.4 / Learn to delegate responsibilities

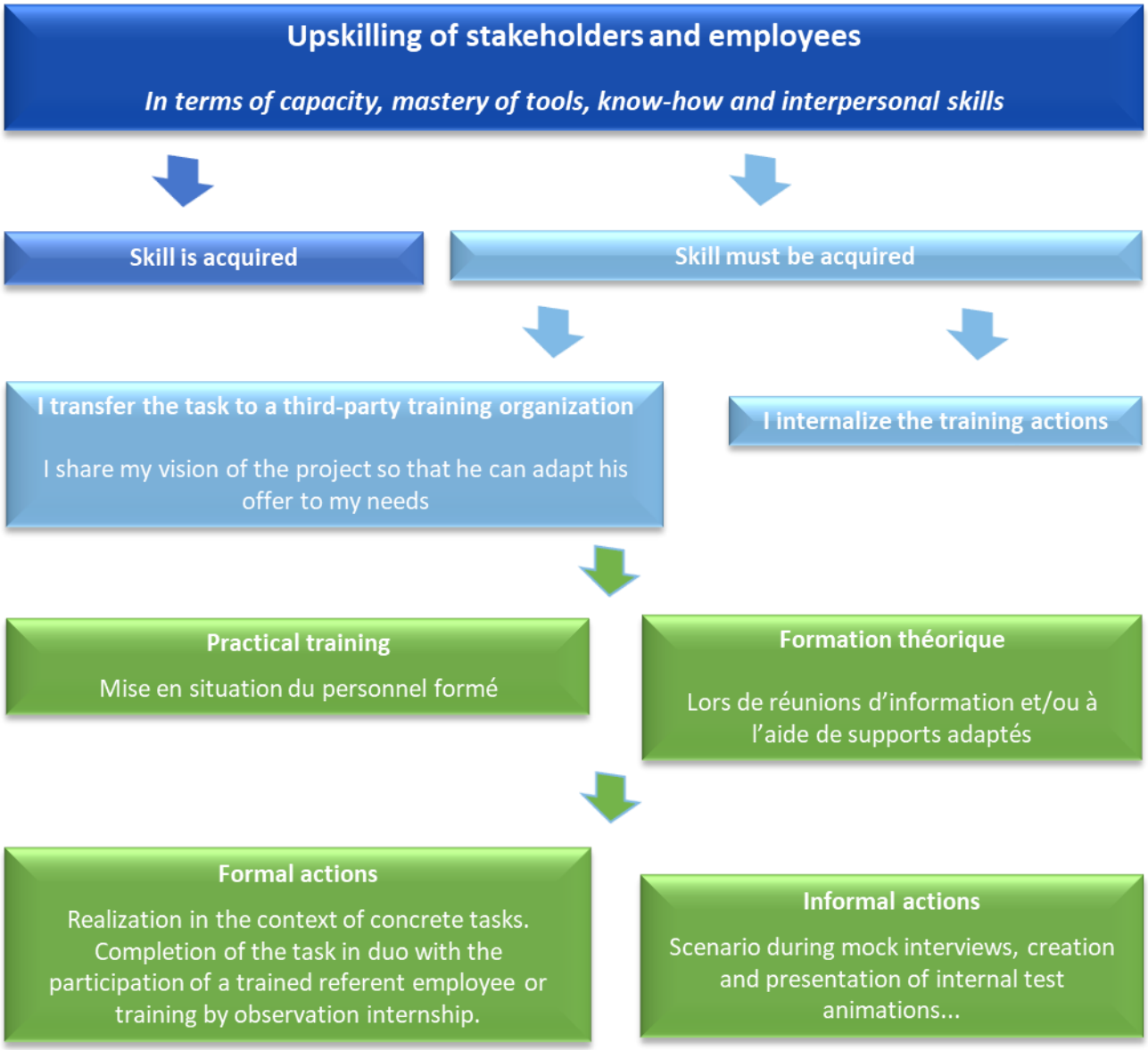
To encourage collective work and reflection, it is important to give everyone the opportunity to express themselves and demonstrate their personal skills. This incitement to reflection should help promote the mobilization and commitment of everyone. As part of the project, taking responsibility and decision-making can be done in a shared way in order to develop the spirit of “doing together”.

5.3.5 / Training and skills development, experience sharing

In the majority of situations encountered, there is a need to train staff, whether experienced or novice. In particular, we can consider as training time, the consultation time spent with external service providers to present your vision of the project to them, but also the nature of the tasks that will be assigned to them. This need for skills development should not be neglected, even after several years of experience with the device.

The training actions must in particular enable the personnel involved to be able to:

- know how to use the tools of the device;
- mastering all knowledge in terms of good practices;
- be able to build, coordinate and lead training sessions or public events.



5.4 / Actions planning

It will be necessary to ensure the production of a provisional timetable for:

- organize the different phases of support in the field: phases of recruitment, monitoring of consumption, support for actions and raising awareness;
- plan events and highlights, choice of deadlines;
- define training and coordination times: meeting dates, training dates.

It's about situating the actions in time and space. While some tasks are assigned to respect a provisional schedule and very specific deadlines, others are organized periodically. This is the challenge

of this phase to plan the date, duration and frequency of the assigned tasks in order to once again ensure that the objectives are met.

This calendar will include the meeting places, the schedules, the nature of the associated objectives and deliverables. A **"Gantt Chart"** type tool or equivalent is recommended for the management of long-term projects.

5.5 / Success Criteria – « How, How much » ?

The success criteria will be defined based on key indicators that we will present in step 8, later in this guide.

STEP 6 : PREPARATORY PHASE FOR LAUNCHING ACTIONS

6.1 / Preparation of actions (entertainment, events, etc.)

Preparation is considered as the time necessary to produce the materials and content that will be used during the action and to prepare the logistical organization (transport, loading of tools, printing of paper materials, etc.).

The preparation time spent creating events, actions and/or animations is not negligible. In the absence of a precise vision of the work to be done, it will have to be estimated as equivalent to two thirds (2/3) of the total time of the project. The action itself only corresponds to the remaining one-third (1/3). This time naturally varies according to the nature of the actions undertaken, their reproducibility but also the experience spent in their conduct.

Development and/or adaptation of tools: recovery of formats...

Over time, some existing materials can be reused or adapted from one year to the next. In the case of renewed actions, it will also be necessary to develop the existing media according to: the target audience, the spatial/temporal realities of the present moment.

6.2 / Recruitment of participants, presentation of tools

6.2.1 / Present the approach and draft action plan

To announce the approach or present the system, the information meeting is generally the most suitable means. This exchange aims to prepare the ground, to answer the first questions and to remove the first brakes which would block potential participants. The information can also be disseminated, downstream or upstream of the exchange by means of posters, printed synthetic documents (flyers) or other usual communication practices.

First, it will be necessary to prioritize specific targets if the number of people to be reached is significant.

In a second step, we can organize a meeting extended to all the actors concerned or potential participants. If the team is smaller, we can plan to invite the whole group to participate in the first exchange.

Getting in touch:

There are **direct contact methods**:

- with participants when they initiate the process (individual registration for the scheme). They then became aware of the device themselves;
- through partners who pre-target potential participants and pass on their contacts.

Or an **indirect contact**, through:

- a communication campaign on social networks, by poster, on the internet, via local media;
- a phoning campaigns (on a predefined target audience);
- a door-to-door operations.

Generally, direct contact provides better results. The first awareness-raising action is carried out during the first meeting organized with the participants (in a place that is known to them and familiar if possible: this allows the facilitator to understand the environment in which they evolve). This allows the trainer to know the points of interest of the individuals. The usual approach is to go around the building with the participants to identify the points of progress to be favored in order to reduce their consumption of energy, water, etc.

6.2.2 / Sensibilization

Giving meaning to the project...

On the basis of several feedbacks from past experiences, it has been observed that the people most involved in the actions undertaken in a professional sphere were also the most convinced on a personal level of the importance of the changes to be made. ***It is important, to encourage the adhesion of your public, to make them aware of the questions raised, before any presentation of a plan.*** Training your employees will be essential to create a dynamic and above all to identify the actors who will support and facilitate the process.

6.2.3 / Presentation and training in the use of the tools

Tools offered during a sobriety animation device must be easy to use so as not to discourage the participants. They are documented and supplemented by support materials. This brings the advantage of autonomy to the participants, but also to the new facilitators and project managers to understand what has been done in the past.

6.2.4 / Participant registration

Once all these steps have been completed, it will then be time to move on to registration. It will be important to provide contact data collection tools. It may also be necessary to formulate, in a legal manner, the framework and limits of participation in the scheme. This will aim to relieve the responders of certain intervention responsibilities. Participation or disclaimer forms can be sent to participants when registering. A settlement can be produced.

STEP 7 : SUPPORT AND COORDINATION OF ACTIONS

Your role is to ensure the proper coordination of the project and the support of the participants. During the preparation phase, potential participants in the actions are trained in the use of the system's tools. The work of the animation teams is to support the participants in getting started.

7.1 / Consumptions monitoring

The support system is structured on the basis of consumption monitoring initiated during the practical implementation of the first sobriety actions. A large amount of quantitative data is collected through this monitoring. The aim is to allow each participant to understand the evolution of their consumption and, in part, of their environmental impact. Everyone can learn to understand these aspects. Everyone can be able to testify and bring elements of reflection from their own experience. The general principle of this follow-up is to bring each participant to:

- **« Consumming less, better and differently » :** energy / water / wastes /mobility / alimentation
- **« Control, choose and value » :**
    - waste : concept of zero waste;
    - movements - localism, mobility;
    - diet : eating local and sustainable;
    - the local heritage : the elders knew how to manage resources.

7.1.1 / Tracking tools training

Those responsible for the system must implement the necessary means to allow participants to monitor their consumption on an individual basis, whether in the context of their personal or professional activities. Each participant must therefore be trained in the use of the tools. For the sake of simplification. The training actions can be carried out by the project leaders, the agents of the territory, or by the tourism professionals themselves.

7.1.2 / Data collection

Data collected during the follow-up phase allows each participant to :

- identify potential reduction levers by considering existing deposits or those to be explored;
- identify the processes and activities at the origin of the production of waste/consumption of water or electricity;
- characterize the role of each of the actors in the production and management of waste (in the case of a company);
- provide a base of factual elements facilitating the construction of decision-making and exchanges (in the case of a company); - to provide a baseline for later evaluation of progress;
- adapt a strategy to support the pursuit of actions.

Reference consumption data :

At the start of the challenge, participants are usually asked to provide information to characterize the nature of their current/past consumption. We speak of "reference consumption". It is then possible to quantify the evolution of consumption during the challenge in comparison with these reference values.

These reference data are generally estimated via consumption records, invoices or on the basis of estimates provided by the energy supplier.

Consumption readings during the challenge:

Participants are asked to take readings of their consumption during the duration of the challenge. More data will be integrated on this subject when the platform is finalized. The identification of consumption flows provides an overview and allows to:

- gather quantified data;
- identify problematic flows;
- serve as comparison tools for the evaluation of the results at the end of the project or after the implementation of each action.

Consumption data of each participant can be entered manually on the monitoring platform tool made available by the partners of the ECHO-Tourism project. Depending on the evolution of certain external parameters, such as climatic conditions for the energy target for example, the digital tool estimates the evolution of consumption trends. It is also necessary to take into account the nature of the consumption monitored to establish the schedule of actions. For the study of heating consumption, for example, the challenge will take place during winter periods. For waste recovery, we will focus more on holiday periods.

7.2 / Animation and awareness-raising events, Follow-up of actions

Certain ethical and moral principles must be kept for each adaptation of the device:

- **do not be moralizing**: Do not position yourself as a lesson giver but rather as a facilitator. The message must not be guilt-inducing or violent (e.g. presentation of shocking images);
- **create social cohesion**: promote exchanges between participants, bring conviviality to exchanges;
- **rely on collective motivation**: value each person's commitments;
- work on the **practical approach**: experimentation with the concepts and content learned;
- work on the **systemic approach**: take the environment into account.

Everyone has their role to play. And this regardless of his level of involvement. It is collectively that it will be possible to change our societies, the systems are interdependent.

The practices implemented on vacation or in the professional context have an impact on daily life and therefore on personal life, and vice versa.

Eco-gesture: individual or collective behavior aimed at limiting its footprint on the environment and on the territory within the reach of all wallets!

Eco-investment: not to be confused with eco-gesture: responsible purchase favoring sober practices for the environment, for example: buying sorting bins.

7.2.1 / Example of an "ambassador" type challenge: intended for tourism professionals

As part of this challenge, we invite tourism professionals present in the territory to participate in an awareness program on the practice of eco-gestures. Experience is gained through practice. The challenge allows them to acquire new knowledge and skills from which they benefit on a daily basis. In exchange for support, professionals undertake to:

- adopt virtuous lifestyles in favor of the environment, whether in the context of their personal or professional activities;
- make their customers, i.e. tourists, aware of these same practices by sharing their experience of the challenge. The objective is to transmit best practices to tourists, informally, during their vacation time;
- follow the challenge as a whole on at least one of the themes covered.

Professionals wishing to engage in this process are invited to:

- follow the MOOC online training provided by the partners of the ECHO-Tourism project;
- participate in the enhancement and dynamism of the planned exchange tools;
- put into practice and experiment with daily gestures in the context of their activities and daily life;
- experiment over a short period of time with the different practices presented during the training sessions (learning through experimentation);
- monitor their consumption, whether individually or professionally.

The MOOC ECO-Tourism addresses the following themes:

Theme N.1 : Water

Theme N.2 : Cultural and natural heritage

- local culture

- architectural Heritage

Theme N.3 : *Energy*

- *heating*
- *lighting*
- *hot water*
- *electricity consumption & renewables energies*

Theme N.4 : *Alimentation*

- supply chains / local & circular economy
- Agriculture

Theme N.5 : *Wastes management*

Theme N.6 : *Mobility and transports*

To recognize and measure everyone's investment in this process, each participant is challenged:

- **to complete, at least, a thematic training proposed in the MOOC;**
- **to put into practice one of the three challenges proposed on the chosen theme;**
- **to monitor their personal and/or professional consumption for a minimum of 1 month.**

Professionals involved in these actions benefit from specific recognition: the title of "ambassador of sobriety" on the chosen theme. It is possible to benefit from this qualification on several themes. For professionals already committed, it is rewarding to display the steps already taken.

Once ambassadors, professionals are invited to participate in awareness-raising events with tourists in order to show them the example to follow and to pass on best practices. They are referenced and are likely to be contacted by tourists to share their experience.

Include professionals in the project

Actions are carried out on the territory. Professionals are invited to participate in order to share their experience. To help them, free and personalized support provided by local players and referral partners is offered. This support includes:

- the organization and creation of promotional events (meetings between professionals and tourists);
- the creation of competitions and events for tourists "tourist challenge";
- access to online resources for training and experimenting with the practice of eco-gestures.

We invite professionals to implement responsible approaches in the context of their professional activities to promote their approach and demonstrate the application of concrete actions. They are referenced with tourists. They are able to present their actions and train tourists in some of the eco-gestures.

How is knowledge transferred from professionals to tourists?

Ambassadors can communicate on their exemplarity to their customers thanks to ECHO-Tourism promotional tools: stickers or self-adhesive buttons, flyers, online content, a specially created Hashtag, holding stands at events, referencing on the site of the project…

Interest for professionals involved in the process:

- **Carry an ethical and civic approach** by preserving the resource on the territory, by avoiding the waste of natural resources, by the preservation of natural spaces, sustainable management of waste;
- **Generate economic interest** by reducing their operating costs;
- **Comply with or anticipate regulatory obligations**;
- **Give a positive image** of their establishment by promoting ethical values;
- **Develop the anchoring**, the local visibility of the establishment and work with actors sharing similar values;
- Develop new activities and **follow evolutions of the market**;

- **Stand out from the competition of major distributors** by focusing on alternative services;
- **Boosting exchanges between employees and developing the spirit of initiative**;
- **Improve working conditions** by rethinking existing management schemes;
- Training through experimentation in new knowledge or skills that can be used personally and professionally;
- Participate in fun actions and get involved as inhabitants and/or citizens of the territory.

How can you benefit from this free and personalized support as a professional?

All you have to do is fill in and sign a charter. The signatories undertake to:

- make contact with the referent of the challenge on its territory;
- participate in the training actions offered on its territory (optional). The professional benefits from a visit and/or a periodic telephone call(s) to take stock of the evolution of his practices;
- launch and follow the challenge on a personal basis, after registration;
- communicate with tourists; - prove, on the basis of proof that the criteria of the challenge have been met and that tourists have adhered to its actions;
- be invited or participate in events promoting the device.

7.2.2 / Example of a typical "tourist" challenge

The objective of the "tourist" challenge is to create an environment conducive to the transmission of eco-gestures and learning by promoting exchanges and the participants' desire to learn. These moments of exchange are planned during events or during meetings with tourism professionals: "ambassadors" or "local agents".

We try to reach tourists during their presence in the territory visited. The objective is to give a positive and sustainable vision of the territory, in order to bring them to commit in turn to participate in this momentum. Through feedback, sensitized tourists tend to reproduce at home the practices experienced on vacation. The objective is twofold: to highlight the initiatives taken by professionals in the sector, and to perpetuate the practice of certain gestures acquired by tourists.

How to create an atmosphere conducive to the transfer of good practices?

It is necessary to plan formats and time for friendly exchanges: workshops, practical demonstrations, a competition or other fun activities...

For the **"waste"** theme, we can imagine, for example, holding: waste collection actions on the beaches, nautical activities, sea trips or other activities related to the problem of plastics at sea, a visit to a sorting centre, co-creation activities. Visit of designer workshops using rejects as raw materials…

For the "**mobility**" theme, we can imagine, for example: the presentation of hiking routes, visits and thematic walks, treasure hunts, nature or bike outings organized on the protected coast...

Creating an atmosphere conducive to learning will require:

- adopt the appropriate speech;
- transmit knowledge adapted to any type of public;
- offer friendly discussion times;
- plan the event on appropriate discussion times.

<u>Example of how a fortnight of typical activity take place - "Tourists" challenge:</u>

Day 1 (Sunday)

Reception and recruitment of participants in the tourist office, among the ambassadors and tourism professionals participating in the operation. Challenge Launch Event Format:

- Presentation of the general principles, the process;
- Identification of tourism stakeholders with participants;
- Evocation of some eco-gestures, in particular those of professionals who can "echo" among tourists ;
- Baptism of families (families choose a code name), delivery of the eco-gestures guide and the ECHO passport (in which the challenges are described);
- Launch of treasure hunt (to be detailed): Tests: meet traders who have clues to the answers;
- Launch of challenges (1 to 2 per theme - examples placed below).

Day 3 : mid-term meeting

- Where are you? what will be your main challenges? Do you have any suggestions, what would you like to share? What challenges did you embark on?
- Shared meal or picnic zero waste.

Day 6 : review of the challenge and prize giving

- **Morning:** input/sending of results by participants;
- **Afternoon:** selection of winners in different categories (discussion of the selection criteria between ambassadors and professionals);
- **Evening:** Presentation of families / of prizes in each category. If possible, prizes are provided by tourism professionals (a dish, a key ring, a game of mini-golf for example).

Presentation of prizes in each category (presentation of results) . Red Thread:

- ***« les enfants font écho » or*** “Children echo” prize

- Treasure hunt results – results of each event between awarding of each prize (to be detailed)

Classic prices – translated from French to English :

- "Famille la plus économe en énergie" or "Most energy efficient family"
- "Famille réVOLtée" or "revolted family" ;
- "Famille la plus creative" or "Most Creative Family" ;
- "Famille la plus curieuse" or "Most curious family" ;
- "Familles Héros de l'eau" or "Water Hero family" ;

- **Special prices – activities**
  - Best zero waste picnic

STEP 8 : PROJECT CLOSURE AND EVALUATION

Evaluation is a process of analysis on a part or all of the project. It consists of assessing the progress of an action or program or measuring its effects. It is based on 3 main axes:

Evaluate and get inform by collecting data, with a collection effort, a search for objectivity and diversification of points of view.

Appreciate trends by analyzing qualitative or quantitative data. This analysis is based on the comparison or achievement of reference indicators. We wonder, for example, about the relevance of an information action to achieve a behavior change objective.

Suggest doing recommendations that lead to decision-making. This involves building the evaluation methodology according to the issues to be addressed, then communicating the results and proposals to decision-makers.

8.1 / Evaluation and success criteria “How, How much”

Your objective as an evaluator will be to define criteria which can make it possible to identify the brakes and levers attached to the implementation of actions. Here are some examples of different areas you can explore:

- **target audience:** profiles, involvement, public satisfaction, public acceptability of approaches;
- **partnership:** involvement of partners, age of partnerships, governance;
- **human and financial resources** for carrying out the actions: methods of intervention, pedagogy, etc.;
- **communication plan**; timeliness, notoriety, etc.;
- action(s) coordination;
- **influence of external factors or "context":** political support(s), health issues, organizational difficulties...

Defining evaluation criteria means answering the following questions: How to measure the results of an action? How to measure the achievement of an objective?

We can define success criteria based mainly on the analysis of tangible figures. Be careful, however, not to underestimate the importance of other key benefit factors related to the context or the purely relational aspect which are very important in this type of project.

Expected developments can affect different dimensions:

- depiction evolution ;
- lifestyle change;
- creation or economy of a service;
- skill and/or knowledge gains;
- improvement of interprofessional relations;
- behavior change;
- improvement of the state of health;
- social relations improvement.

Result(s) indicator(s) :

To compare evolutions, "evaluation indicators" are used which make it possible to characterize the state of an object at a given moment. An indicator is therefore a measuring instrument, a useful variable to help to measure a change. Criteria for choosing an indicator: it must be **valid, reliable, observable** or **measurable** (qualitative or quantitative).

Key success factors: they can be defined as indicators measured over the long term.

To conclude, the analysis of an evaluation question is organized around the assessment of indicators defined.

Assessment criteria	Indicator *(qualitative and quantitative criteria)*	Key success factors *(secondary assessment criterion)*
Participants' level of involvement	**- number of registered** *Quantitative criterion: 40 registered* *Qualitative Criterion: 20 registrants present at the end of the challenge*	Several participants plan to register for the challenge for the upcoming edition.

8.2 / Organization and data sources

8.2.1 / Organizing the assessment

Point of vigilance *:* construction of the evaluation action must be done in parallel with the action plan construction. The assessment should not be carried out at the end of the project during the writing of the reports, because it will lose all interest. It is advisable at the start of the project to:

- clearly define the evaluation criteria and indicators;
- produce standard evaluation documents and provide data collection tools that will be used at the end or during the project;
- structure the framework of the final reports (in order to enhance them over the duration of the project).

These documents will then evolve throughout the project.

Data sources

Care must be taken, when analyzing the results, to consider as soon as possible the context in which the data were collected in order to avoid any biased or counterproductive analysis. Anticipate emotional reactions. It is preferable, for example, not to poll a participant's opinion on the same day, live, but rather to invite him to share his opinion later. The participant will take time to meet the conditions of being really interested and convinced by the process.

8.2.2 / Participant satisfaction as a development indicator

Answering to needs of the target audience is an indirect way of avoiding additional costs related to the multiplication of complaints or bad reviews from participants. Dissatisfaction can harms the image of a project. **The best way to preserve your image and the dynamic of participation is therefore to anticipate!**

This is not about questioning the overall organization of your management system or your current action plan. In addition to responding to the satisfaction of the participants, it is essential, above all, to preserve the quality of operation of its structure. The evolution, identified as necessary, will have to be progressive so that everyone can adapt to it.

8.2.3 / Satisfaction potential of a target audience (opinion) and expectations (sensitivities)

There are different ways to proceed to collect all the qualitative and quantitative data that you will need to assess the level of satisfaction (support for your activities) of your participants. This can be done by direct exchange or on the basis of behavioral analysis.

Indirect collection methods:

- metadata analysis on the evolution of animation market trends;
- survey of the competition or benchmarking approach;
- intervention of specialized structures and professionals;
- purchase of a data set from a third party;
- analysis of consumer feedback (published opinions, rating sites, etc.);
- analysis of customer buying behavior.

Indirect analysis methods reflect, more generally, a trend in the evolution of consumer demand. Data collected are not always specific to the actual functioning of your establishment. It is sometimes difficult to assess the context in which they were collected. They can be used to define or justify trends in order to refine a survey addressed directly.

Direct collection methods:

- ask your participants to evaluate the services or products offered;
- opinion polls;
- facilitating discussions and exchanges.

8.2.4 / Examples of tools to adopt to measure the level of satisfaction of a target audience

Satisfaction surveys / polls (open and closed questions)

Upstream it will be necessary to define more precisely the :

- framework of the survey: what do we want to measure?
- sample: who will I interview?
- appropriate channel and format for transmitting the survey: mail, telephone, email, social networks?

To go further… What good practices should be adopted?

Target **only one objective per survey**. I revise my copy if the document is too long, difficult to read, or even discouraging to read;

Write short and easily understandable questions to make it easier to process the answers;

Start the document with open and non-involving questions;

Assess the overall level of discernment of the public vis-à-vis your actions;

Identify your audience's level of understanding. An unsuitable response may result from a misunderstanding. You can ask short questions while being specific about the elements of the response to be provided; **Ask at least one open-ended question** at the end of the document to give participants the opportunity to express themselves.

It is seldom useful to know the identity of the participants in a survey; the survey may be completed anonymously. In theory, you will be more likely to get sincere answers.

However, if you wish to target more the context and the typical profile of the participant who responded, you can request additional information on the identity of each (age, profession, date of response to the questionnaire, etc.).

The « test participant »

You can offer to test your service(s) and/or product(s) in order to gather their feelings, expectations and points of view. A common practice consists in proposing to a person outside the establishment to test the services and/or products anonymously. This practice may be misunderstood by your employees, it should be used sparingly

The « qualitative interview »

Unlike the questionnaire, the interview takes place directly during discussions. This method is used to identify participants' expectations, needs and motivations or to **better understand their buying and decision-making process**. We use open-ended questions on the framework of a questionnaire to get the customer to talk and collect their feedback. The qualitative interview can be individual, but also collective. The disadvantage of this decision tool is that it can be time-consuming and therefore expensive.

The collection of figures, combined with the knowledge of good practices and the various obstacles and levers, should make it possible to draw up a strategy for the implementation of an action plan.

Part 2 –