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Lifelong  
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Programme

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# WP5 –

**Finalization of the training  
model and certification system**

# HANDBOOK

**To promote and disseminate  
the training activity**

**Coordinated by:**

**Pestalozzi Foundation**

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S O t o u r i s m  
T O



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**Associated partners:**



**Scuola Centrale Formazione**, National Association of VET centres



**PA Group**, field of local sustainable development and local governance <http://www.pagroup.it>

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*The merit of a project like So.To. is also to make it clear that Tourism - and I am using the capital T - is really a vocation: it has rules, it presupposes a knowledge of the "tourism-machine" and also a deep understanding of the human aspect of tourism – of the traveller and the host, whether an individual or a community. [...] Tourism in general and Tourism for All in particular can and must be an engine for the development of Europe as well as a great employment opportunity: this will be even more possible if the level of professionalism and the capacity to be and build a network are enhanced.*

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*Fabrizio Pozzoli*

*Vice-President of ISTO –International Social Tourism Organization*

So.To. is a project funded by the European Commission's Lifelong Learning within the Leonardo da Vinci Programme and is the Acronym for "Socializing Tourism" as main goal of the project, accordingly with Manila Declaration of the World Tourism Organisation in 1980 in the headline below "[...] *to make tourist leisure accessible to the majority, including youth, families and elderly people, by providing an exceptional economic opportunity*". The aim is achieved by preparing integrated training course for social touristic operators and increase the knowledge on social tourism across actors involved in the action.

The project pays particular attention to the cooperation between different actors from this sector and develops potential networks at local level, between touristic operators and social economy entrepreneurs. The final beneficiaries are all tourists, those traditionally re-excluded by the touristic movement.

SoTo is a transnational project and is implemented by a consortium composed by private and public entities, including 4 vocational training centres, one University, two Public Authorities and a consortium of social cooperatives. These entities represent Italy, Malta, Spain, Greece, Poland and Romania.

### **Project description**

So.To. develops a training path which will develop and enhance the skills of tourism operators (not just hotels and SME) and is focusing on social tourism, not just for disable people and elderly, so as to allow higher access to this population, but more widely on all the target, for a more sustainable social dimension of tourism, so as to allow everyone to benefit from social tourism proposals. So.To. furthermore has trained operators to offer social tourism in line with the new vision of social and touristic approach.

**Project beneficiaries.** This training model is addressed to a particular target group: touristic operator from profit and non-profit sector and to people working in public and private incoming/ touristic agencies. These, of course, are **the direct beneficiaries** of the action. **The final beneficiaries** are all tourists, also those traditionally excluded by the touristic movement. Disabled people, elderly, large families, youngsters, unemployed, low-income people can usually not afford a holiday or a simple visit, because of different hindrances, from economic to physic point of view.

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**The project's objectives** were: (1) to increase the level of knowledge on social tourism through the actors who work within the project; (2) to develop networks at local level between tour operators and entrepreneurs in the social economy; (3) to find a new way to promote tourism in an economic downturn, like the one we are experiencing.

These objectives in particular were achieved by following the described actions like: (1) **Researches in area of social tourism**; (2) **Design a training path and certification system for social tourism operators**; (3) **Implement training activities** in each partner's country; (4) **Dissemination** of results of this action and involvement of other organizations.

**The innovative character of the project.** At European level many studies and researches have been done, focusing on the phenomenon and its impacts on economic and social fields, but few actions took place concerning the education and training on social tourism, especially for those who run touristic activities everyday and for those social entrepreneurs working with groups of people, that social tourism wants to involve.

For this reason SoTo build a training model including different aspects, from the technical competences, to the more relational ones. The training courses were addressed to different types of entrepreneurial and social actors, one of the innovative aspects of the action. The Integrated Training Courses for Social Tourism SoTo invested in the development of competences, on personalized planning of services, matching the expressed needs of visitors, trying to intercept all those groups excluded by traditional tourism.

The new and innovative actions for welcoming and receiving, inspired to social tourism, offer to local community an additional tool for the valorisation of territorial brand, especially in this moment of crisis in which local territory and community are experiencing a decrease in touristic incomes, besides strong economic and occupational losses.

Another aspect to be considered is the passage from marketing to *societing*, quoting professor Bernard Cova, where *societing* stands for the study of the new productive function of consumers, with their capacity to produce social and symbolic connections, around goods and to make this contribute to value generation for enterprises, but also to promote a collective and participated vision of local development.

*Researches in area of social tourism. Firstly focused on “desk researches” of general picture of social tourism across Europe, and collecting of good practices and experiences to the partners, then through study tours visits of these good examples. Finally, with focus groups organised in each country of this consortium exchanging knowledge on social tourism area between different actors.*

### **Social Tourism: Prerequisites**

Social tourism is an established part of the tourism sector in many European countries; however great variations exist across Europe in the scale, emphasis and direction of social tourism practice (McCabe, Minnaert and Diekmann (2012:1). This has been the main challenge of the preliminary research of the SoTo Project “**State of art: education in social tourism, competences and training needs**” performed by **University of Malta**, Institute for Tourism, Travel and Culture (MALTA) as a result of the Working Package 2 in SoTo Project. Its aim was to create the basis on which to develop a training path to develop and enhance the skills of tourism operators who participate in social tourism for disabled persons and the elderly, but will also aim for a wider and sustainable social dimension of tourism that will allow everyone to benefit.

The “Integrated Training Courses for Social Tourism” LLP Project aims to take into consideration the role that social tourism could play in European economic and social life when linked to the current economic crisis. The risk emanating from the increasing economic constraints is that tourism, as conceived today, could become a luxury for the majority of European populations. The key innovative element of this project is the generation of the foundations of the needed European framework and to promote this as an integral part of future vocational training.

In this respect, the project aims to develop integrated competences, matching technical skills with relational/social capacities, so as to offer welcome services appropriate to different types of customers/guests, while at the same time shaping, throughout the course of the training activity, package vacations through the collaboration between touristic operators and organizations of social economy. During these training courses, a favored role being assigned to the development of competences on personalized planning, concerning the actual needs of different customers.

These services – spanning from the “simple” removal of architectural boundaries, to accompaniment, tour guides, health care, transport and mobility, creation and fruition of events – should be supplied, in a subsidiary way, as much from the market as from civil society and should serve to amplify and enhance the touristic product offer inside a territory.

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<sup>1</sup> Chapter prepared by **University of Malta**, Institute for Tourism, Travel and Culture (MALTA) as a result of the Working Package 2 in SoTo Project.

Accordingly with its objectives SoTo Project expects to create a favourable environment for social tourism in all regions involved in the project, especially by creating a network of operators, public/private for profit/non profit, having transversal competences and skills, but who are, most of all, capable of cooperating so as to valorize their territorial brand and local community.

This particular aspect is at the core of the courses: there is indeed, a general shortage of touristic services specifically designed for categories of persons who are typically considered as disadvantaged users, such as disabled persons, seniors, young people and large families. Data indicates that, after appropriate adjustments of tourism infrastructures, 70% of disabled people could travel under favorable conditions and this is quite relevant in a progressively ageing European society. Considering, moreover, other sources like OSSATE (One-Stop-Shop for Accessible Tourism in Europe) and ISTO (International Social Tourism Organization); the potential catchment area could comprise 134 million people, between people with a physical and mental disability and the elderly.

In the European scenario, one person can find some training courses on social tourism, but these are not generally accepted as a tool to address the transformation of touristic needs in a changing society and they are not considered as a way of doing tourism through the improvement and societizing<sup>2</sup> of the value of the local community and its territorial brand.

Furthermore, the lack of “personalized” services is due to an absence of cooperation between the various actors operating in a territory, especially between touristic operators and social economy entrepreneurs, who are generally more aware of special needs. This situation is partly due to the historical organization of social tourism: in some member states, it has become the remit of the public sector and therefore for economic rationality, there is a tendency to go for a ‘one size fits all’ approach. In other States it falls under the remit of the private sector which tends to focus on the establishment of niche markets which are ring-fenced in such a way that ‘the client’ is taken care of completely by the tour operator in an ‘all-inclusive’ holiday resort catering specifically for special guests with a very similar profile.

Concerning the reference to political strategies and priorities, the theme of social tourism has been mentioned at European level a number of times. For example, the European Economic and Social Committee voiced its opinion on “Socially sustainable tourism for everyone” in 2003 and in 2006 on “Social tourism in Europe” (2006/C 318/2). The European Commission has taken different steps in this direction, the most important being the creation of the Calypso project, linking social tourism to the sustainability agenda

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<sup>2</sup> Societing is the modern colloquial term for societal marketing. Andreasen (1995) defines it as “*the application of commercial marketing technologies to the analysis, planning, execution, and evaluation of programs designed to influence the voluntary behaviour of target audiences in order to improve their personal welfare and that of their society.*” The difference between social marketing and societizing is that the former is associated with corporations while the latter concerns the third sector: public agencies and non-profit organisations

and the general competitiveness of European tourism, underlining also the potential economic contribution of this kind of activity through job creation and enhanced visitors' spending multipliers. This action falls within the general objectives set by Calypso, which aims to combat fluctuating seasonal touristic patterns, through the function of social policy of tourism, development of economic activity and growth. Furthermore it hopes to increase the sense of European citizenship, as well as giving importance to the demand-side and the social perspective of tourism.

For this reason – so as to be in line with the EU2020 Strategy, where Europe is to reach different and predetermined goals such as a smart, sustainable and inclusive growth, the main purpose of SoTo project is to train and educate different operators in relation to the social and touristic inclusion of every person, thus, contributing to an inclusive growth. This is reflected in the Calypso philosophy:

*“In promoting access for groups for which going on holiday has progressively become more difficult, social tourism strengthens the tourism industry's revenue generation potential. Social tourism aids mobility and enables off-season tourism to be developed, particularly in regions where tourism is highly seasonal. Accordingly, social tourism encourages the creation of longer-lasting employment opportunities in the tourism sector, in line with the Lisbon Strategy, by making it possible to extend such jobs beyond the respective peak season.”* (McCabe n.d)

The first consideration is towards the various definitions of social tourism and the diverse approaches across different countries, as well as within each single State or Region. At European level various studies have been produced, especially in the last decade or so, focusing on this phenomenon and its impacts on economic and social fields, but few actions have been implemented concerning education and training on social tourism, especially for those who run touristic activities on an everyday basis and for those social entrepreneurs working with groups of people that social tourism wants to involve.

For this reason SoTo project provides a training model which incorporates a number of aspects, from the technical, to the more relational competences. The training course caters for a wide selection of entrepreneurial and social actors - one of the innovative aspects of the action. In this context, SoTo invests in the development of competences for personalized planning of services matching the expressed needs of visitors, in an effort to intercept all those groups excluded by traditional tourism.

The new and innovative actions for welcoming and receiving, features which are inspired by social tourism, will offer an additional tool to the local community for the valorization of the territorial brand, especially in this moment of crisis when local territory and community are experiencing a decrease in touristic incomes, besides strong economic and occupational deficits.

Another aspect to be considered is the passage from marketing to societing. Quoting Professor Bernard Cova (2002, 2013), where societing stands for the study of the new productive function of consumers, with their capacity to produce social and symbolic connections around goods and to make this contribute to value generation for enterprises,

but also to promote a collective and participative vision of local development.

### **Origins of Social Tourism**

Tourism with a social aspect has existed for centuries with examples ranging from tourism for educational purposes, holiday camps for disadvantaged children to medical travel and pilgrimage trips funded by community members. In Europe, up to the 19<sup>th</sup> century, tourism was only accessible to the privileged classes of society. Probably due to industrialisation, in the period between the end of the 19<sup>th</sup> century and the early years of the 20<sup>th</sup> century, youth hostels, holiday camp sites and bed and breakfast accommodation appeared in different parts of Europe. These were mostly attributed to the private or for-profit sector, although there were also religious or socio-educational voluntary groups that organised summer camps for children and youths. However after the 1936 Convention on 'Holiday with Pay' of the International Labour Organisation, and the subsequent 1948 Universal Declaration of Human Rights declared that "everyone has the right to rest and leisure, including reasonable limitation of working hours and periodic holidays with pay", social tourism was 'born out of an ethical demand' ([www.bit-int.org](http://www.bit-int.org)).

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The ILO convention was, in fact, the impetus for workers after the Second World War to benefit from 'holidays with pay' to the extent that 'the holiday' started to become part of the national lifestyle (Minnaert, Diekmann and McCabe, 2012:25). Chauvin (2002 in Minnaert, Diekmann and McCabe, 2012:25) confirms that this period was also the time when "public authorities started subsidising social tourism, which was, and still is, in many countries controlled by associations, workers' councils, popular educational movements and collectives".

Western Europe passed through its Golden Age or '*les trente glorieuses*'<sup>3</sup> as it was known in France, '*Wirtschaftswunder*' in Germany and '*miracolo economico*' in Italy: the thirty years from 1945 following the end of the Second World War to the mid-seventies when the economic downturn was triggered by the oil crisis of 1973. Traditional social tourism flourished with the advent of the holiday camp and the holiday centres as a new affordable way of taking a holiday. In mainland Western Europe, many holiday centres offered full board with activities and entertainment included (Caire in Minnaert, Diekmann and McCabe, 2012:73-87,) and were run by charities or unions (Minnaert, Diekmann and McCabe, 2012:26). In the UK, Butlins Holiday Camps offered 'a week's holiday for a week's pay' (Brookman, 2009). However according to Minnaert et al, the competitive rate was still beyond the means of the lowest paid or unemployed (Hardy, 1990:55) as many of the camps were run on a commercial basis, while camps built by education authorities, trade unions or charities although they did exist, were however far less common.

During this period, society witnessed the launch of a number of International organisations and conferences that supported the concept of Social Tourism. These included the International Federation of Popular Travel Organisations (IFPTO) in 1950, the Federation of

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<sup>3</sup> Jean Fourastié coined the term in 1979 with the publication of his book *Les Trente Glorieuses, ou la révolution invisible de 1946 à 1975*

International Youth Travel Organisations (FIYTO) in 1956, and the Bureau International du Tourisme Social (BITS) in 1963. By 1972, the Vienna Charter could declare that ‘social tourism is a fundamental social fact of our times’. Both the Vienna Charter as well as the later 1999 UNWTO Global Code of Ethics for Tourism proposed that social tourism ‘should be developed with the support of the public authorities’ (UNWTO Article 7:3).

Notwithstanding this, the economic downturn of the 1980s and the more recent economic crisis, has resulted in extensive and deep cuts in public spending and rationalisation of resources, with the result that there is less funding for social tourism whilst at the same time the persons that fall into the ‘social tourists potential market’ or ‘poverty gap’ are on the increase. This phenomenon has created a reaction, which has shifted the emphasis from the public sector towards the private and third sector<sup>4</sup> initiatives as supporters of social tourism. This is confirmed by the Montreal Declaration of 1996, re-amended a decade later with the Addendum where the shift has now placed a ‘greater emphasis on the role of (host-related) solidarity tourism as a fundamental aspect of social tourism’ (Minnaert, Diekmann and McCabe, 2012:28).

For the benefits to be felt by both the tourists’ and hosts’ population, that is disadvantaged in some way, the concept and therefore the definition of social tourism must be changed. Just as society, changes according to new realities then even our definition of Social Tourism must change. Social Tourism is not the centre or focus – **it should be the driver that enables the benefits of tourism to be accessible to all members of society**. The benefits must not be short-lived. They must be of a long duration. Responsible and sustainable tourism is the key. It is imperative that they are not used as a form of green washing or to further purely commercial gains but must be integrated into what is known as the triple Bottom Line (TBL). The precursor to the triple Bottom Line was based on a phrase coined by John Elkington in 1995, “people, planet, and profit”. This captures the values and criteria for measuring success in the social, environmental and social spheres.

This approach will ensure that everyone benefits from social tourism – not just by providing accessible tourism for disadvantaged potential tourists, but by also making the benefits of tourism accessible to all, regardless of the differences. ‘Different’ or ‘novel’ experiences are what tourists are seeking (Avellino 2012:53, Seppo Iso-Ahola, 1982 in Middleton et al, 2009:80, Jang et al 2009, 51-73). It may be a different climate, an exotic landscape or an encounter with persons of different cultures, backgrounds or ethnicity. There is, besides, the educational dimension, the building of social and cultural capital from the tourist encounter. This can occur when persons enjoy the experience of meeting others with similar disabilities or challenges and learn from each other how each addresses these needs in their home and holiday environment. Speaking to persons who have a shared memory, shared

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<sup>4</sup> The third sector here is used as described by Cardoso (2000): “The concept of ‘Third Sector’ itself, its profile and its shapes are not that clear yet, not even for most actors involved in its formation. There are several terms that we have been using to characterize this space, which is nor State nor market and which actions aim at public interest: non-profitable, philanthropic, volunteer interests. [. . .] I am convinced that the concept of ‘Third Sector’ describes a space for experiments of new ways of thinking and acting upon the social reality. Its assurance has the great merit of interrupting the dichotomy between public and private, in which public was a synonym for state-owned and private companies. We are witnessing the appearance of a public sphere that is not state-owned and which private initiatives present public sense. This makes social dynamics richer and more complex”. (Cardoso, 2000, pp. 7–8)

challenges and diverse backgrounds can lead to better understanding, cooperation and appreciation – leading to the creation of social and cultural capital.

Traditionally regional tourism development focused on the tangible aspects such as job creation, tourist arrivals and increasing land values, but this approach ignores the community aspect of tourism development (Avellino 2009). Innovation and sustainability need to factor in the social and cultural capital (Avellino 2005). Macbeth *et al* (2004) argued that regional tourism development has much to gain from having a strong SPCC (Social, Political, Cultural Capital) foundation as both SPCC and Tourism relies each other and contribute to each other. They also list a number of benefits that SPCC can contribute to tourism development. Thus there is:

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- An increase in SPCC can improve a community's sense of well-being, which in turn increases the community's receptiveness to tourism, which is then returned to the community as a benefit.
- A benefit for the communication flow within the community itself and between the community and the industry – thus providing for an enhanced decision-making process in the course of tourism development, as the community would have contributed to the same process.
- Facilitation of the transaction process, with the inherent reduction of costs due to increased productivity when social networks are tapped, or when cooperation and coordination between these same networks is implemented especially when the knowledge (cultural capital) is accessed through these networks.
- Participating in the generation of cultural activities that also attract visitors and which gives the local community a sense of character that in return fosters 'return visits'. In rural regions, SPCC can add to what some theorists refer to as 'countryside capital', that is, the unique environmental, economic, cultural and social characteristics of regional communities that make them attractive as 'countryside' destinations (Slee, 2003 in Macbeth et al, 2004).

### **Research methodology**

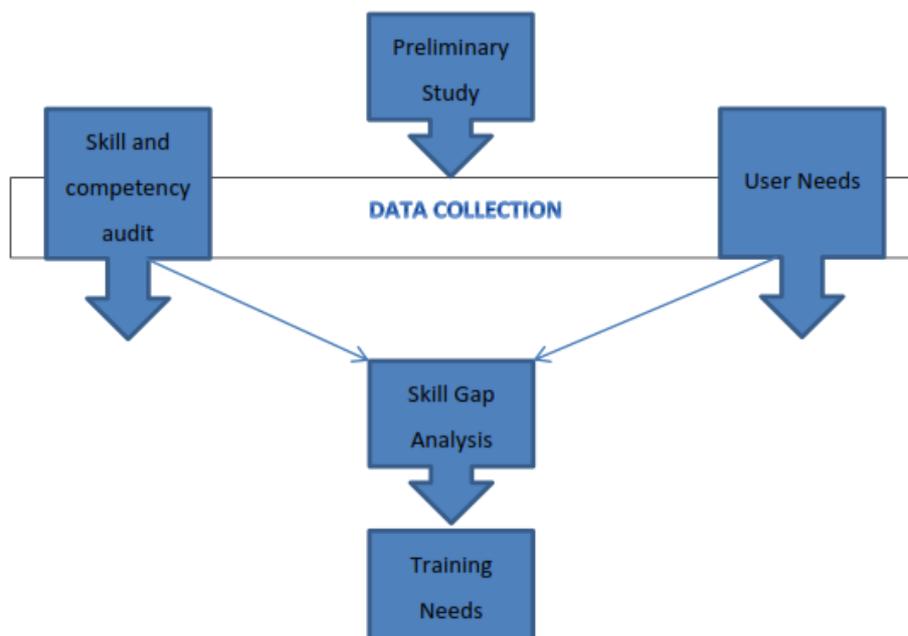
This research aims is to provide a scientific literature review and documental review of the state of the art of adult education in Europe on social tourism, research and good practices, with documentation on national frameworks provided also by project's partners. In this respect was used an integrated working methodology that combines theoretical analysis with qualitative research and hands-on activities, based on a participative and bottom-up approach, which means active involvement - at all stages, of all the relevant actors, either project partners or external stakeholders. It does so by listening to the opinions and requests of those that on a daily basis, experience on the ground, the reality of working on this specific area of tourism and social issues. To this aim, a series of 6 focus groups run by partners in their own country and coordinated by the University of Malta provided the primary data for analysis. In all, approximately 90 European stakeholders participated in the focus groups, which provided rich insights into the issues on social tourism as well as clear indications on the type of training that is needed at grassroots as well as at institutional level.

A second source of data was collected by means of Best Practice Indicators. These were

collected through documentation that was gathered from all the partners, and analysed together with case studies that are indicated in the academic literature available in the English Language. During the study visits, the partners and researchers were also exposed to the workings and intricacies of Social Tourism and its variations through a selection of case studies. There was the opportunity of interviewing and talking directly to the persons that manage the enterprises and as well as frontline persons that benefit from Social Tourism enterprises.

In all twenty five cases studies were collected by the partners and these were integrated with other case studies on social tourism practices which are accessible through academic literature. The third component of the research data is that related to the collection of information on the training which is provided on Social Tourism and its derivatives at institutional and professional level. The primary data was collected from the partners as well as from other institutions that agreed to participate. Here we must draw attention to the fact that this study is not exhaustive due to various restrictions; however the material we have gathered allows us to have an overview of the situation in salient European countries.

A training needs analysis (TNA) of the social tourism stakeholders was carried out as well as of the potential participants, which would include an understanding of the skills. It was important to understand what is needed by the social tourist, so that the training to be able to address the skill/competency gaps. The information gathered from the State of the Art research formed the basis of training programme design and course development and it can also be used to form the basis of a review and training measurement system which to date has not been envisaged in the project. This could allow the measurement of the impact that the training will have on the product offer as well as the tourist experience, both during and after participating in social tourism.



The research was limited in that the desk research component focused primarily on

english language literature and was aimed to identify the problems and issues, which could be addressed. Also, it was the preliminary step in the project for the designing and developing a model training programme.

For this state of the art study, it was decided that, besides desk-top research, we would also include examples of best practices, which were collected from the home countries of the projects' partners. Many of them were visited and/or interviewed either by the host partners or in some cases by all the partners in the course of the study visits. Also, the research referred to documented case studies, which were included in recent academic works so as to obtain as broad a picture as possible of the Social Tourism scenario in Europe.

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The desk research was accompanied by field research, which consisted of study visits and focus groups. During the **study visits** the face-to-face presentation of different product offer permitted:

- to gain a deep understanding of what is at stake and what is involved;
- to gather information which is not readily available on websites or brochures;
- to see how people go about their normal routine at their workplace;

In order to:

- evaluate the challenges and opportunities, which they face;
- to understand how these opportunities were taken up and how in some cases, they were lost because of too much bureaucracy, no legal frameworks or lack of knowledge, competencies and skills which would have allowed these persons and organisations to take up opportunities which presented themselves.

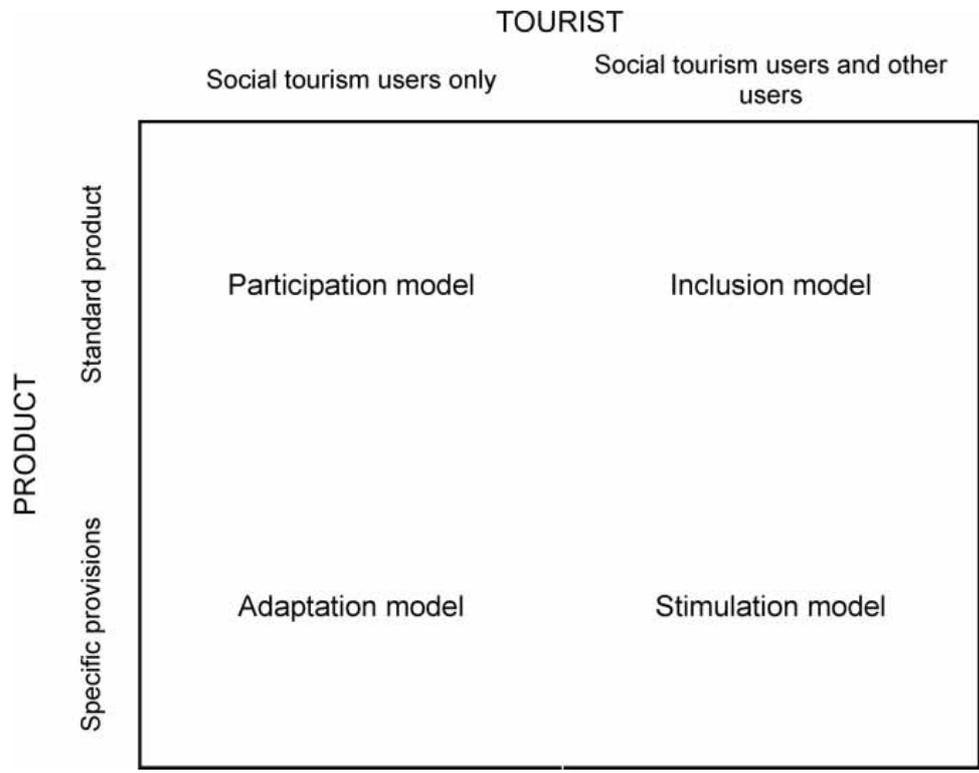
The **focus groups** were conducted by each partner country and involved 15 stakeholders invited in every country, to discuss their perception on Social Tourism as well as to contribute their ideas on what is needed to support this specialist market. In all, over 90 persons participated from six countries. The participants included stakeholders from the tourism industry such as tour operators, guides, and hoteliers. Institutions also participated and these came from the private sector, the third sector as well as from public authorities including National Tourism Organisations. From the demand side were included persons (or their representatives) who travel but who also have disadvantages such as physical limitations, financial, social and educational limitations.

### **Definition of Social Tourism**

Literature research indicates that although there are contested definitions of Social Tourism, two main elements are generally present. The first element relates to the 'social' aspect in that tourism should be accessed by all, even by persons that have economic, social, legal, cultural, technological, physical, and mental limitations. The second element relates to the definition of tourism itself, in that it is travel away from one's usual place of residence, for a temporary period. This therefore denotes a movement or mobility of persons with different motivations amongst, which is leisure and recreation.

These two aspects emerged from Hunzicker (1951:1) definition of social tourism as "the relationships and phenomena in the field of tourism resulting from participation in

travel by economically weak or otherwise disadvantaged elements in society". This leads to establish interpretations which are apparent in Social Tourism in Europe today. These interpretations, based on the work by Minnaert, Maitland and Miller (2011) formed the basis of the focus group questionnaire. In the document entitled 'What is Social Tourism? (2011) four different definitions are given for Social Tourism and these are based on different scenarios linked to the types of persons that are encouraged to participate in tourism, the product offered and the type of initiatives used to attract participants.



**Interpretations of Social Tourism ( Minnaert, Maitland and Miller, 2011)**

Respondents generally agreed that the different models are complimentary. There is a general acceptance that the Participation model and the Inclusion models are the most widely accepted, although they do not always function well.

Focus groups respondents continuously raised the issue of who should be the beneficiaries of Social Tourism, which is a circular discussion that brings us back to what would be a suitable definition of social tourism.

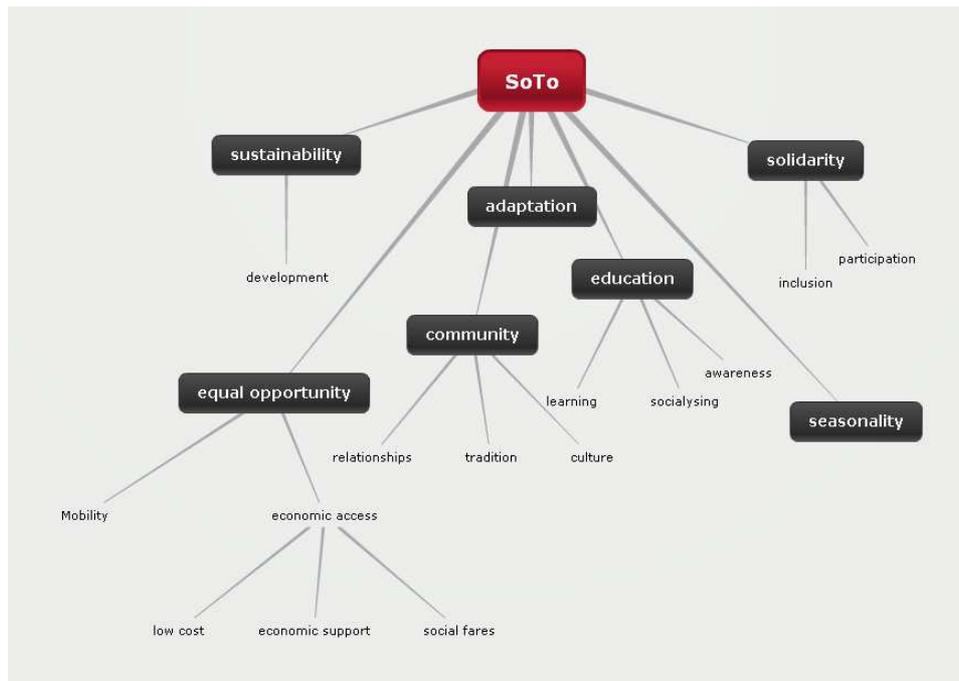
A much wider definition says that **social tourism is for everybody – workers, families and associations**. Companies may support their workers with paid holidays or discounted vouchers for personal development, education and leisure purposes. As everybody has right for qualitative leisure time, this could be an alternative. Social tourism in this case would also promote socialisation and integration with host communities and in addition, support economically the localities (EESC, 2006 and Hotel Mule, 2013). In fact during one focus group session, it was pointed out that there does not seem to be a business model for social tourism which traditionally utilises government grants or other initiatives, but in the current economic scenario, could be taken up by other enterprises so that

families on low incomes could have access to travel opportunities.

Social Tourism organisations now recruit managers who have had training and/or qualifications in hotel business or management. However this perspective tends to focus on the 'hard' management part of the enterprise. The basic 'soft' skills are similar at the ground level, however in the case of social tourism there is the need for a specialisation when it comes to being 'customer-centric'. The Europe for People with Disabilities (European Disability Forum, 2001: 4) highlights the issue that there is a need to 'improve training to develop skills within the tourism industry to cope with disabled tourists'. This issue was repeatedly highlighted in the focus groups when representatives of disadvantaged groups lamented that tourism facility providers such as hotels, restaurants and even transport providers lack the basic skills when dealing with disadvantaged groups, not necessarily disabled persons but also the elderly and families.

The discussions with the partners' members, revealed that although the term 'social enterprise' can be applied for profit making organisations, we would concentrate our training model on the social enterprise practices that pertain to non-profit organisations. 'A Social Enterprise is a business with primarily social objectives whose surplus is principally reinvested for that purpose in the business or in the community, rather than being driven by the need to maximise profit for shareholders and owners.' (Progress report on Social Enterprise - A Strategy for Success, DTI, 2003:8). The tourism social enterprise we are envisaging is one that will have social objectives, with an entrepreneurial orientation and that has a social dimension within its ownership profile. This perspective is not new: 'Political decision-makers consider entrepreneurship in tourism to be a means of local business development on the fringes, for instance in the European Union' (Rita, 2000; Pearce, 1992; Cotrell, 2001; Crouch and Ritchies, 1999; Callahan, 1995 in Tetzschner and Herlau, 2003).

Social Enterprises are by nature part of the stakeholder economy, where enterprises are created by and for those with common needs and accountable to those they are meant to serve' (EU, 2005 in Thomas and Augustyn 2007: 79 ). In their research on social enterprises in the tourism sector in the UK, they identified that one of the problems, was skill shortages, even though anyone wishing to start their own business can access free training.



**Figure: Issues which will be addressed by the SoTo Training Programme**

### **Designing the Training Programme**

The research concluded that although there is awareness about accessible tourism, social tourism, and other associated issues, these do not form part of tertiary level studies per se. They are integrated into specific study units such as Interpretation for special needs at visitor sites or catering for special needs in the hospitality industry. To achieve homogeneity and as well as a transfer of skills and competences, it is suggested that the training courses are to be regulated and approved by an official body. Although it can be concluded that the accessible tourism training is to be made available across the board not just to employees or entrepreneurs in the industry, but also transversally by including other disciplines such as architecture, engineering, communication, marketing and digital professionals. However the remit of this study is to design a training programme for end users and therefore, we are aiming at stakeholders in the tourism industry, with a special focus on the third sector which operates at community levels.

There are also challenges that have to be taken into consideration when designing the training programme. The first is the sustainability challenge: the training programme has to have the sustainable concepts at its core. As the overall concept of accessible tourism for all means more travellers, this may also equate into more tourism for the masses. Mass tourism is perceived as the opposite of sustainable tourism, which tends to promise an alternative to mass tourism. However research indicates that 'sustainable development (and by extension, sustainable tourism) as a result, can mean just about anything to anyone (Romeril, 1994 in Weaver 2006:19). There is evidence of strong and weak interpretations of sustainable tourism which we must be aware of when designing the training programme. There is no ideal type of sustainable tourism, although Weaver (2006:25) suggests a spectrum ranging from a minimalist to a comprehensive approach. Nonetheless, the approach will depend on the context as well as financial sustainability. If

a tourism project is not financially viable, it will not survive.

The training project must have a two-pronged approach: Social Entrepreneurial skills for Tourism and Hospitality and Tourism Management Skills for Social Tourism. This is a Suggested Course Programme:

|                          | <b>Week One:<br/>Social Entrepreneurial skills for<br/>Tourism</b>   | <b>Week Two:<br/>Hospitality and Tourism<br/>Management Skills for Social<br/>Tourism</b>   |
|--------------------------|--|---|
| <b>Objective</b>         | To create, develop and manage a social enterprise  | To provide customer centric skills for Hospitality and Tourism  |
| <b>Learning Outcomes</b> | <p>To learn a range of skills that will allow the student to set up a successful tourism social enterprise</p> <p>To be able to create a feasible business plan</p>                                  | <p>To learn a range of skills that will allow the student to sensibiliser himself to the needs and expectations of the disadvantaged guest.</p> <p>To develop a range of technical, personal, interpersonal, organizational and generic skills that can be applied in the tourism and hospitality industry. These include effective communication skills, customer service skills, information processing skills, critical thinking skills, creativity, problem-solving skills, etc.</p> <p>To be able to apply appropriate knowledge and skills in a wide range of industry-related situations in the context of 'tourism for all'</p> |
| <b>Course Content</b>    | <p>Understanding the legal and business environment of Social entrepreneurship</p> <p>Marketing the Social Tourism Enterprise</p> <p>Finance and Business Planning for Tourism Social Enterprise</p> | <p>Before the trip: Communication for accessible tourism, Marketing, Creative thinking (new product development, improved services for disabled guests, etc)</p> <p>During the Holiday: Reception services, communicating with the guest.</p> <p>After the trip: networking skills,</p>   |

|  |  |   |
|--|--|---|
|  |  | <p>keeping in touch, designing and collecting customer questionnaires.</p> <p>During the discussions about the results of the research, it was agreed that 20 percent of the training is to be country-specific, so as to address the fact that in every member state there are economic, political, legal, social, cultural and environmental differences that need to be addressed.</p> <p>There are also specific situations that are found at community level and which must also be addressed by the training.</p> |
|--|--|---|

**Recommendation and Conclusion**

This report started out by trying to find a suitable definition of social tourism: a definition that is still elusive, mainly because it is open to debate due to the large number of stakeholders that are engaged in touristic activity and which use the terms ‘social tourism’ ‘tourism for all’, ‘accessible tourism’ and other variations on the same theme interchangeably, and also because of the myriad of stakeholders who are actually engaged in social tourism, but do not identify it as such.

A suggested definition that would serve to guide the training programme is being proposed here. *‘Social tourism is a driver for Tourism with a social dimension to provide value to all: tourists, support centres and communities based on the premise of sustainability and responsibility’.*

Social tourism, although not a new concept, has only recently been propagated and discussed widely by different entities. The private industry is still trying to adapt to the emerging demands of disadvantaged clients. On the other hand tourism education has always traditionally been focused on producing employees, who can form part of a profitable system and with an increasing number of graduates and students competing with each other for the best jobs. Working in the Social tourism sector might not be seen as a good career choice because of the perception that it is low paid or for the unskilled. Instilling ethical values in tourism education would help, but it would not be enough. A successful social tourism education model will materialise, only if a balance is found between the demands of the industry and those of the client base.

Social tourism is not just about creating an opportunity for persons to access destinations

that they would not normally be able to visit. Social Tourism must mean more than that: social tourism has to include everybody. The visitor can be exposed to the host – together they come to a shared understanding, a shared responsibility, a respect that gives valorisation to the touristic, as well as the everyday life of a place.

## Content and methodology of the training programme<sup>5</sup>

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The results highlighted on the previous stage were taken a further step forward in the process of the designing the training programme, based on the results of the previous stage including information on the training needs and the analysis of indications and proposals coming from the touristic and social actors of every territory involved in the action. Teachers/trainers are the key role at this point, because with their competences they can translate the needs, indications and proposals in a training program. The final objective of was to develop a common model for the training course. In this respect, during the project, the exchanges between the participating vocational training organizations helped to compare their methodologies and contents. Furthermore, the trainers developed all the didactic tools for the implementation of these courses.

The general aspects taken into account in the implementation of the training activities, which are the background in the development of the common training model, are:

- Shared and comprehensive definitions of social tourism – tourism for all: accessible, social, sustainable;
- The dimension of the phenomenon: diffusion of social tourism across Europe and on the single territories;
- Approach shift: from undifferentiated / mass tourism to personalized and local tourism. The new dynamics of tourism after the crisis;
- From marketing to “societing”: how the way of doing brand changes also in tourism;
- Network manager approach: how to develop territorial networks supporting social tourism;
- How to plan integrated touristic services: not just a place, but a community.

### **Programme description**

The training programme is called «SO-TO Socialising Tourism – Integrated training course for Social Tourism», and was elaborated on a European scale by European trainers.

The training programme is divided into two modules, Each module will be further divided into sub-units further elaborated below.

M1: Strategic Business Design of a Tourism Enterprise

M2: Managing a Social Tourism Enterprise.

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<sup>5</sup> Training content was developed by KEK Z- Invest with support of all VET organizations in the consortium..

The SO-TO training programme has been developed based on the previously conducted training needs analysis on a European scale, targeting the target group of the project namely, tour operators, people working in the tourism industry and people who wish to start up a social tourism enterprise or expand the activities of an existing one.

The programme has to be delivered following traditional training methods in a classroom by presentations, discussions, case studies and collaborative work. | 20

The duration of the training programme is a total of 100 hours divided as follows:

- 40 hours generic training
- 20 hours national content training
- 40 hours project work

### **General information about the programme**

|                                   | Title/<br>description  | Duration in hours    |                 |                     | Total<br>trainees | Educational<br>background                 |
|-----------------------------------|------------------------|----------------------|-----------------|---------------------|-------------------|---|
|                                   |                        | Theory/<br>classroom | Project<br>work | Country<br>specific |                   |   |
| Course                            | Socialising<br>Tourism | 40                   | 40              | 20                  | 60                | Lyceum,<br>HEI,<br>Vocational<br>training |
| Range                             | European               |                      |                 |                     |                   |   |
| Location                          | European               |                      |                 |                     |                   |   |
| Developed<br>with all<br>partners | Yes                    |                      |                 |                     |                   |   |

| <b>MODULE 1. : Strategic business design of a tourism enterprise</b> |  |                |
|--|--|----------------|
| <b>Units</b>   | <b>Operations of a touristic company</b>                 | <b>18hours</b> |
|  | <b>Welcome and ice breaking session</b>                  | <b>1</b>       |
| Unit: 1.1.1:   | The notion of a tourism enterprise / social enterprise   | <b>1</b>       |
| Unit: 1.1.2:   | Functionalities of a tourism company (social enterprise) | <b>2</b>       |
| Unit: 1.1.3:   | The activities of a tourism company                      | <b>2</b>       |
| Unit: 1.1.4:   | The tourism market and competition                       | <b>2</b>       |

|                                   |  |                 |
|-----------------------------------|--|-----------------|
| Unit: 1.1.5:                      | e-marketing (overall strategy)   | 5               |
| Unit: 1.1.6N:<br>National content | Social company legislation – to be developed by the national trainers.<br>1. Legislation<br>2. Processes involved in setting up of a social enterprise (individual or in groups)<br>3. Processes involved – possible case study identification<br>4. Presentation to group | 5               |
| <b>Units</b>                      | <b>Strategic business plan</b>   | <b>16 hours</b> |
| Unit: 1.2.1:                      | Strategic business planning  | 3               |
| Unit: 1.2.2:                      | Strategic step by step business design and organisation in tourism companies   | 8               |
| Unit: 1.2.3N:                     | National case studies<br>Select 2 social enterprises in your region and discuss their business plan set up.<br>Analyse its features (group or individual), and present.  | 5               |

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| <b>MODULE 2. : Managing a Social Tourism enterprise (30 Hours)</b> |  |                 |
|--|--|-----------------|
| <b>Units</b>   | <b>E-tourism applications</b>  | <b>12hours</b>  |
| Unit: 2.1.1:   | Definition and characteristics of e-tourism  | 2               |
| Unit: 2.1.2:   | The impact of e-tourism in tourism demand  | 2               |
| Unit: 2.1.3:   | Profile of the Manager (skills/competences)  | 2               |
| Unit: 2.1.4:   | Sensitisation - target group   | 1               |
| Unit: 2.1.5N:  | National content :suggestions<br>Identify 2 social tourism enterprises (or use previous ones) and<br>a. Identifythemanagerialstructure<br>b. Identify the local environment i.e. where they operate and what the advantages of the area are<br>c. Identify the clientele they are targeting<br>d. Identify the products and services they offer (if possible conduct an interview with them through telephone or F2F), and how they are set up to compete in the market. | 5               |
| <b>Units</b>   | <b>E-marketing applications</b>  | <b>14 hours</b> |
| Unit: 2.2.1:   | e-marketing and online marketing   | 3               |
| Unit: 2.2.2:   | Social Media   | 1               |

|               |  |          |    |
|---------------|--|----------|----|
| Unit: 2.2.3:  | Performance e-marketing and public relations   | <b>1</b> |    |
| Unit: 2.2.4:  | Electronic distribution intermediaries and the tourism product   | <b>1</b> |    |
| Unit: 2.2.5:  | Tourism marketing blog / promoting services and products   | <b>3</b> |    |
| Unit: 2.2.6N: | A. Health & safety: norms of health and safety applied to tourism enterprises to protect clients and staff.  | <b>2</b> | 22 |
|               | B. Use the previous 2 social tourism enterprises you have selected and identify the marketing features of their marketing plan. Discuss advantages and disadvantages for this. | <b>3</b> |    |

## Piloting Training Course' Results<sup>6</sup>

### Methodological aspects

Six training courses for target groups have been implemented in different countries with 15 participants for each training course have. They have been selected to attend a total of 100 hours. The training activity took place in each partners' country, in Italy with CEFAL, in Greece with KEK Z-Invest, in Malta with the local University, in Poland with DOT Lower Silesia, in Romania with Pestalozzi Foundation and In Spain with OES.

Some tools were produced specially for the evaluation of the training programme, for trainers and trainees, and also for a final group discussion, in order to improve the finalization of the methodology.

This sub-chapter present all the documents and information about course programme, organization's details, participants time sheets, course evaluation as expressed by participants, suggestions and feedback of each partner in order to arrange the course for the finalisation of the model.

After the end of the course was made an overall analysis of the path, through a survey among the trainees, testing their satisfaction regarding the course, testing the acquisition of competences and knowledge, their capacity of transferring what they have learned in their everyday activities, but also analyzing the change in their position on the theme, beliefs and meanings. This was done using a tools package developed in the previous stage of the project. Also, was foreseen a self-evaluation of the trainees after the training course through the use of dossiers, reflective agendas or through the creation of an experience community for the comparison/exchange/discussion on solutions adopted, good practices, new procedures, etc.

<sup>6</sup> Material developed by **Observatori Economia Solidaria (OeS)**, Association of solidarity economy, Spain

The trainees evaluated the satisfaction regarding the training activity; about the usefulness, portability and applicability of what has been learned during the course; about the didactics, competences and efficacy of the trainer and of the organizational aspects of the course.

The main aspects of interest were:

- Know how the training program has been developed in each country
- Evaluate student satisfaction, regarding the training path
- What the trainers think and their suggestions about the training program

**The tools used in the evaluation phase**, regarding the course main control, the trainees, the trainers and also the group, addresses to different aspect of the evaluation process:

The participants' selection and needs assessment of the trainees

Appedix\_A1\_INTERVIEW\_GUIDLINES

The training course' monitoring activity (the detailed description concerning the training course's organization including trainers' and tutors' opinions):

Appendix\_A2\_SELF\_ASSESSMENT GRID TRAINEES

Appendix\_A3\_WEEKLY GRID TRAINERS

Appendix\_A4\_GUIDELINES FOR CONDUCTOR

### **The course**

This form represents the tool used by all the partners. Every aspect concerning the training program, the trainers and the trainees was included in this document in order to communicate /facilitate us important aspects that are the basis for the training development. This tool was updated and shared with other project partners at different times: before starting the course, during the course and also at the end of the course completely fulfilled.

### **The trainees:**

This part contains all the information about the evaluation of the trainees, concerning the duties of the WP Leader and also the Partners. There was planned two modalities to collect qualitative and quantitative the info, as follows:

|            | <b>PERSONAL INTERVIEWS</b>                | <b>ASSESSMENT</b>   |
|------------|---|---|
| When       | Before the training<br>After the training | 1 at the end of the 1 <sup>st</sup> week<br>1 at the end of the 2 <sup>nd</sup> week<br>(before/after the group discussion) |
| Who        | Each Partner                              | Each Partner  |
| Objectives | Know the motivations, skills,             | To know the trainee   |

|               | <b>PERSONAL INTERVIEWS</b>   | <b>ASSESSMENT</b>  |
|---------------|--|--|
|               | competences and expectative of the trainee.  | impressions about the course in real time, a picture with their qualitative descriptions in his own learning path.   |
| What          | 10 minutes interview face to face with the trainee, before and after the training course.  | An easy grid to be filled up by the trainees and handed by the partners to them at the final of each week. Both grids will be collected by each partner at the end of the course |
| Suggestions   | Informal interview face to face (or by phone if it's not possible), one week before the start of the course, to know motivations to follow the course, expectative about the course and possible inconveniences or problems. | Explain to the trainees how to complete the grid and the importance to be honest with the answers, that IS NOT an evaluation   |
| Annex related | <b>A1 Interview Guidelines</b>   | <b>A2 Self-Assessment for Trainees (W1 &amp; W2)</b>   |

**The trainers:**

This part of the work is designed to collect the impressions of the trainers about the training program: qualitative aspects and also practical aspects about the training path.

|            | <b>WEEKLY PLAN GRIDS</b>   |
|------------|--|
| When       | 1 at the end of the 1 <sup>st</sup> week<br>1 at the end of the 2 <sup>nd</sup> week   |
| Who        | Each Partner   |
| Objectives | To know if the course is adequate to the standardized time and the planning of contents suggested in the design of training. Both weekly plan checks will be collected by each |

|               |   |
|---------------|---|
|               | <b>WEEKLY PLAN GRIDS</b>  |
|               | partner at the end of the course  |
| What          | 10 minutes interview face to face with the trainee, before and after the training course.             |
| Suggestions   | Explain how to check the plan and the importance to be honest in this grid, that IS NOT an evaluation |
| Annex related | <b>A3: Weekly Plan Grid Trainers</b>  |

### **The group**

A final 30' session will be very important to know about the group feelings and impressions about the training path and also about SoTo project motivation degree.

This is proposed as an informal conversation between the TRAINEES, the TRAINERS and EACH PARTNER in order to get the qualitative information that couldn't be asked individually by online survey.

|               |   |
|---------------|---|
|               | <b>30 MINUTES DISCUSSION</b>  |
| When          | At the end of the last session  |
| Who           | A conductor from Each Partner   |
| Objectives    | Get qualitative group impressions about the training path and the objectives of the SoTo project  |
| What          | 30 minutes chattering session trough the participants involved on the training, using some guidelines suggested by the WP Leader to facilitate the conductor manage the session |
| Annex related | <b>A4 Guidelines for conductor</b>  |

### **The Course:**

|               | Total       | Italy   | Poland | Malta   | Greece | Romania | Spain  |
|---------------|-------------|---------|--------|---------|--------|---------|--------|
| Nº days       | 71          | 14      | 13     |         | 15     | 15      | 14     |
| Hours per day |             | 4.29    | 7.69   |         | 5      | 5       | 4.36   |
| Language      | 6 different | Italian | Polish | English | Greek  | Romania | Spanis |

|        | languages |   |   |   |   | n | h |
|--------|-----------|---|---|---|---|---|---|
| Visits | 3         | 1 | 0 | 2 | 0 | 0 | 2 |

### The Trainees' Profiles:

| 26

|                      |                        | Total | %     | IT | PO | MA | GR | RO | SP |
|----------------------|------------------------|-------|-------|----|----|----|----|----|----|
| Trainees             | Number                 | 102   |       | 24 | 15 | 12 | 24 | 17 | 10 |
| Gender               | Male                   | 37    | 36,28 | 4  | 6  | 6  | 10 | 6  | 5  |
|                      | Female                 | 65    | 63,72 | 20 | 9  | 6  | 14 | 11 | 5  |
| Age                  | 16 – 25 y              | 9     | 8,82  | 0  | 4  | 1  | 3  | 0  | 1  |
|                      | 26 – 35 y              | 41    | 40,2  | 7  | 5  | 7  | 12 | 8  | 2  |
|                      | 36 – 45 y              | 23    | 22,55 | 6  | 3  | 3  | 5  | 2  | 4  |
|                      | 46 – 55 y              | 17    | 16,67 | 7  | 2  | 0  | 3  | 3  | 2  |
|                      | 56 + y                 | 12    | 11,76 | 4  | 1  | 1  | 1  | 4  | 1  |
| Status               | Employed               | 33    | 61,76 | 22 | 5  | 11 | 0  | 16 | 9  |
|                      | Unemployed             | 38    | 37,25 | 1  | 10 | 1  | 24 | 1  | 1  |
|                      | No answer              | 1     | 0,98  | 1  |    |    |    |    |    |
| Educational Level    | Degree                 | 39    | 38,23 | 11 | 10 | 7  | 5  | 2  | 4  |
|                      | Diplomat               | 22    | 21,57 | 2  | 0  | 1  | 5  | 12 | 2  |
|                      | High School            | 25    | 24,5  | 8  | 2  | 3  | 9  | 2  | 1  |
|                      | Professional Education | 10    | 9,8   | 0  | 3  | 1  | 5  | 1  | 0  |
|                      | Other                  | 2     | 1,96  | 2  | 0  | 0  | 0  | 0  | 0  |
|                      | No answer              | 4     | 3,92  | 1  |    |    |    |    | 3  |
| Experience in sector | 1 – 3 y                | 32    | 31,37 | 4  | 5  | 0  | 14 | 7  | 2  |
|                      | 3 – 5 y                | 20    | 19,6  | 10 | 0  | 1  | 1  | 4  | 4  |
|                      | 5 – 10 y               | 16    | 15,69 | 5  | 4  | 3  | 0  | 2  | 2  |
|                      | +10 y                  | 19    | 18,63 | 5  | 2  | 6  | 0  | 4  | 2  |
|                      | No answer              | 15    | 14,7  |    | 4  | 2  | 9  |    |    |
| Type of Organization | Profit                 | 8     | 7,84  | 0  | 0  | 6  |    | 2  | 0  |
|                      | Non-Profit             | 6     | 5,88  | 1  | 1  | 1  |    | 0  | 3  |
|                      | Private Enterprise     | 18    | 17,65 | 5  | 2  | 0  |    | 8  | 3  |
|                      | Public                 | 6     | 5,88  | 3  | 0  | 2  |    | 0  | 1  |

|                       |                     | Total | %     | IT | PO | MA | GR | RO | SP |
|-----------------------|---------------------|-------|-------|----|----|----|----|----|----|
|                       | Administratio<br>n  |       |       |    |    |    |    |    |    |
|                       | Tourist<br>Operator | 7     | 6,86  | 2  | 0  | 0  |    | 4  | 1  |
|                       | Entrepreneur        | 8     | 7,84  | 2  | 2  | 2  |    | 1  | 1  |
|                       | Other               | 37    | 36,27 | 9  | 0  | 1  | 24 | 2  | 1  |
|                       | No answer           | 12    | 11,76 | 2  | 10 |    |    |    |    |
| Organizations<br>size | 1 – 10 p            | 21    | 20,58 | 5  | 4  | 4  | 0  | 4  | 4  |
|                       | 11 – 20 p           | 3     | 2,94  | 0  | 0  | 0  | 0  | 2  | 1  |
|                       | 21 – 50 p           | 6     | 5,88  | 1  | 2  | 1  | 0  | 0  | 2  |
|                       | +50 p               | 12    | 11,76 | 2  | 0  | 5  | 0  | 2  | 3  |
|                       | No answer           | 60    | 58,82 | 16 | 9  | 2  | 24 | 9  |    |

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### The Trainers' Profiles:

|                       |                                   | Total | %     | IT | PO | MA | GR | RO | SP |
|-----------------------|-----------------------------------|-------|-------|----|----|----|----|----|----|
| Trainers              | Number                            | 37    |       | 19 | 2  | 6  | 3  | 4  | 3  |
| Organization          | University                        | 7     | 18,9  |    |    | 5  |    |    | 2  |
|                       | Educational<br>Training<br>Centre | 7     | 18,9  | 1  |    |    | 2  | 3  | 1  |
|                       | Non Formal<br>Education           | 1     | 2,7   |    |    |    |    |    |    |
|                       | Other                             | 20    | 54,05 | 18 | 2  | 1  |    |    |    |
|                       | No answer                         | 2     | 5,4   |    |    |    | 1  | 1  |    |
| Field of<br>Expertise | Communicati<br>on                 | 5     | 13,51 | 4  |    |    |    |    | 1  |
|                       | Tourism                           | 9     | 24,3  | 4  | 2  |    | 1  | 1  | 1  |
|                       | Marketing                         | 7     | 18,9  | 6  |    |    |    | 1  |    |
|                       | Management                        | 8     | 21,62 | 5  |    |    | 1  | 1  | 1  |

|  |           | Total | %     | IT | PO | MA | GR | RO | SP |
|--|-----------|-------|-------|----|----|----|----|----|----|
|  | No answer | 8     | 21,62 |    |    | 6  | 1  | 1  |    |

## Conclusions

It can be concluded that this pilot course has been very useful to determine aspects as contents and methodology, that should be improved in order to develop a training path of greater quality and useful in this field of social tourism. The training was appreciated not only necessary, but there is a real demand for the sector of tourism, the social sector and for entrepreneurs. | 29

Both trainees and trainers were very motivated and had high expectations. The trainees hoped to obtain new possibilities for professional development within the sector and get to know other professionals, who, like them, have social concerns within the tourism sector.

The main points highlighted as new knowledge acquired were:

- Social work and disadvantaged groups.
- Management on social enterprise, marketing and social media.
- Who to create a tourist package and how to create a business plan.

Finally, has been detected that some contents were very generic and teachers have had to adapt them or to extend them to meet the expectations of the course.

In the same way, the distribution of hours has been another fact to consider, for a better academic progress it would be required to do less daily hours and fewer days per week, broadening the duration of the course, trainers agree with trainees that should be modified.

Another remarkable fact is the experiences that the students have shared, since they worked as a meeting point, sharing knowledge, concerns, problems and solutions.

As we said before, the teachers had to adapt materials and case studies to meet the expectations of the course and motivate students. After the training, trainees emphasized that:

- They have improved professional skills, and they're ready to work in the social tourism sector.
- They feel confidence to set up a business or activity in this field.

Another highlight is the difficulty of the professionals of the sector to attend classes on a regular basis, for this reason it should be considered the option of a blended course. The theoretical part could be online and in the classroom could perform case studies, visits and application of theory. This would facilitate a better use of time; this would allow more professionals who work to undertake the course.

In summary, this pilot course has been a very enriching experience for trainees, trainers and organizers, which allowed reaching very useful conclusions for improvement for the continuity of the training and the promotion of social tourism.

The training activity took place in each partners' country: in Italy with CEFAL, in Greece with KEK Z-Invest, in Malta with the local University, in Poland with DOT Lower Silesia, in Romania with Pestalozzi Foundation and in Spain with OES. These courses were addressed to local touristic operators from profit and non-profit origins, traditional operators and social entrepreneurs (those leading social cooperatives, associations, social enterprises), but also including employees in public and private touristic agencies, local organization for touristic information and promotion.

Every VET partner used the same methodology prepared in pervious phase of the project, but training experiences as well as their national context were unique. After the experimentation of the pilot training course, the partners were asked to share their experiences and methodology of the training. The information offered about the training program, the learning objectives, the number of participants and the selection system, the most useful didactic tools and the added value of the training (lessons learned) gave specifics of each course performed during the project.

**Training Program.** Every partner delivered the training programme accordingly with the SoTo training programme proposal, but with slightly modifications “to depict target group needs and enforced with case studies from Greece” (Vocational Training Centre KEK ZINVEST – Athens, Greece) or to adjust trainers expertise in Pestalozzi Foundation case, were “the three trainers who delivered the course had different backgrounds, to cover all the aspects of the training programme. One was a specialist in Tourism, the second was specialist in Social Work and Marketing and the third, a specialist in Social Field (Intercultural Education, Disability)”.

The training programme implemented in Malta by University of Malta, Institute for Tourism, Travel and Culture was conducted as part of the second piloting of the project. Since the first testing of the pilot course was deemed too long on the participants in the partner countries. Moreover, in some of the partner countries, partners commented that more small group – project work is conducted. In conducting the training the Maltese partner devised a revised programme totaling 100 hours but divided as follows:

- 25 hours for in-class training based on lectures, small group discussions and one to one training
- 6 hours for on-site visit
- 70 hours of practical group work – with tutorials given by respective tutors and a presentation of a group-based project (groups of three persons each)

**The target group consisted** in “people already working in the touristic field in a region with seasonal tourism that needed new ideas for the off-season and how new services can be created” (Pestalozzi Foundation, Romania), people “interested in opening social enterprises or active as members in social enterprises wishing to learn about social tourism and how new services can be created” (Vocational Training Centre KEK ZINVEST, Greece), with a heterogeneous structure, “coming from various branches of the touristic sector” (CEFAL

Emilia Romagna, Italy). In Malta “the course was aimed at people who had at least school leaving certificate, background in the hospitality industry or tourism and or related area, and were also keen on venturing into new initiatives within the tourism sector” (University of Malta, Institute for Tourism, Travel and Culture).

**Content.** In terms of content, the SoTo programme was perfectly compatible with a training programme in tourism, accredited by the Romanian Authority for Qualification so that it was well received by the participants (Pestalozzi Foundation, Romania). Also, in Greece case, the SoTo programme’s two modules relate to the setting up of a social enterprise in the tourism sector, its management, skills and competences of manager as well as business plan aspects and marketing integrated with social media (Vocational Training Centre KEK ZINVEST, Greece).

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**Learning objectives.** The main learning objective was to test the SoTo Training programme and evaluate its efficiency and usefulness for the particular target group (Vocational Training Centre KEK ZINVEST, Greece). Supplementary, in Romania the objectives were formulated at **cognitive level** (acquaintance with the concept of social tourism; (what it is, its functions and forms), **action level** (elaborating a business plan for a social touristic company) and **attitude/personality level** (raising awareness and sensitisation on social diversity and the needs of different disadvantaged groups from touristic point of view). Similar, Italian partner formulated the general objective (“the participants of the training course will learn how to build a social-touristic integrated product, based on knowledge of the tourism market and tourism products of the land and their usefulness to the needs of particular target groups”) and the four specific ones addressed to specific content and competencies (market research, construction of the social-touristic product, business plan, promotion plan).

**The selection system.** Training programme was delivered to people who had registered their interest to participate in trainings related to social enterprise start up and management (Vocational Training Centre KEK ZINVEST, Greece). In Romania the training programme was promoted in various meetings with stakeholders in the field of tourism and the candidates were selected “mainly in accordance with their motivation and disponibility to participate to the classes” (Pestalozzi Foundation, Romania). In Malta, the selection system was focused on reaching people within geographical areas of the Maltese Islands, where new tourism initiatives are being developed. One such area is the Three Cities (Cottonera Area) and Grand Harbour area which is an area that will be actively involved in the European Capital of Culture Initiative in 2018 and also an area which is in need of social and economic development. The area is also one where tourism and culture are earmarked by the Maltese government as a means for development. In this respect, a call for applications, with a brief outline on the SoTo project and course objectives were circulated via email to the following networks: Database of the Malta Hotels and Restaurants Association; University of Malta website and Network of the Cottonera Resource Centre University of Malta, Institute for Tourism, Travel and Culture.

**Most useful didactic tools used.** One of the most appreciated didactical tools used were *slides* provided by the trainers (CEFAL Emilia Romagna, Italy). In Greece, those are following the “processes established in the KEK ZINVEST vocational training centre: *integrating discussions, case studies, reflection processes* as well as *theory integrated with practice*” (Vocational Training Centre KEK ZINVEST, Greece). In Malta the PowerPoint presentations prepared by the lecturers were available via Google drive set up on purpose for course participants and tutors (University of Malta, Institute for Tourism, Travel and Culture).

Also, another tool was the “*student's notebook for project works*”, elaborated by the trainers and filled in by the participants and the *role plays* provided by the trainers used for (a) raising the awareness on the difficulties some people have in finding adequate conditions when travelling and (b) the exercises and simulations on communication with different/difficult clients (Pestalozzi Foundation, Romania).

*Group projects* are a useful tool to feature and elaborate the knowledge and insights obtained from on-site visits at organisations running initiatives using social entrepreneurship principles (University of Malta, Institute for Tourism, Travel and Culture).

The trainers investigated and analysed the SoTo training programme and as experienced trainers, integrated their own pedagogical and delivery methods and tools, to the proposed delivery established in SoTo (both in Romania and Greece).

#### **Added value of the training. Lessons learned:**

It is important to combine training, innovation and creation of networking, approaching the main stakeholders of the tourism sector and creating useful synergies for the territorial development and the communities, which share the same goals and the same sensitivity on social tourism. It is more useful to participants to participate at trainings with an enhanced practical component. In this respect it is important to combine class room delivered lectures and one to one interaction with tutors. These help participants to understand better the material presented and to apply it to the practical ideas they were working on. Also, visits enabled the participants to see in operations in practice, to meet the managers and discuss albeit briefly the challenges and merits of running a social enterprise.

The conformation of the heterogeneous group of participants, coming from various branches of the touristic sector, has allowed the comparison between different points of view and different approaches on social tourism, creating the possibility to build a broad and motivated debate in the classroom;

Since target groups differ and training needs vary, the SoTo programme has to be generic in order to be modifiable by the VET trainers to target specific and individual training needs at time of training;

The VET trainers need to be subject matter experts and provide valuable examples relating to national content and reality and market;

The final project deliverable needs to be initiated from the beginning so that participants work on this in stages throughout the training programme duration;

Duration needs to vary according to target groups, i.e. from 2 weeks to 2 months since the participants are working people and cannot easily leave their work;

Integration with existing training programmes can be done in order to enhance SoTo training programme and hence, provide added value to the participants;

Cooperation with two or more trainers (not more than 3) is optimal since discussions are fruitful and can enhance experience for the participants;

The raising awareness on the potential of social tourism in a region with a history of isolated social touristic initiatives. People realised that they can create a network for the promotion of the social tourism, taking in account that the region has a dramatic landscape that could be exploited in winter as well;

Never underestimate the potential of people and places. Sometimes is necessary only a little impulse coming from outside to wake the dormant energy.

### **Other comments**

The certification aspect is very strong and provides a competitive advantage to the SoTo programme. It is a feature well sought in Greece and possible partnerships with stakeholders in the field of social enterprises and tourism can be created

In Romania the training was interesting mainly for the people new in the field. They discovered the broadness and the potential of the social tourism. People working in the field for many years (10-20) are most interested in courses accredited by the Ministry of Tourism and found very difficult to find the time to attend to such a long training (100 hours).

In Malta the tutors who assisted the participants in the preparation of the project commended highly the work conducted by the students. In fact two of the ideas were deemed to be feasible for market launch. The project presentation was opened for the public, and the personnel at the Institute for Tourism Travel and Culture was invited to attend.

In terms of content, the SoTo programme was perfectly compatible with a training programme in tourism accredited by the Romanian Authority for Qualification so that it was well received by the participants.

The Process of Certification for SoTo Project has been documented The University of Malta as partner in SoTo Project. Malta University has own validation system that is recognised and endorsed by the Bologna Process. All courses developed by the University of Malta are internationally recognised and are given an equivalence, that is level rated according to the European Qualifications Framework.

**The Governing Body<sup>7</sup>.** New courses, programmes and study units by teaching departments or Institutes at the University of Malta are validated by the Programme Validation Committee (PVC). The PVC is a standing committee of the University of Malta Senate<sup>8</sup>. The main functions of the PVC, which is composed of academic members of staff nominated for this purpose by the Rector, are as follows:

- To provide quality assurance mechanisms acceptable to Senate and appropriate for internal and external audit purposes
- To ensure that academic programmes are of appropriate standard
- To ascertain the validity of the programmes on offer
- To ensure optimal use of available resources
- The PVC is assisted in its task by the Academic Programmes Quality and Resources Unit (APQRU) which also provides on-site and off-site assistance to departments and faculties, institutes and centres with regard to validation procedures.

**The Purpose of the Programme Validation Process.** All new taught programmes must be validated, using the validation process set out by the University. This is a key mechanism by which the University establishes academic standards, ensuring that:

- The academic rationale for new programmes is fully exposed and understood
- The requirements for students to achieve the intended learning outcomes are clear
- Resources can be provided to deliver the programme to standards acceptable to the University

In addition to this, the validation process aims to ascertain that proposed programmes are in line with the University of Malta's overall vision and strategy, are responsive to market demands, and that the quality of our programmes is comparable to that of our European and international partners. The procedure for the approval and validation of new programmes is designed to be rigorous and effective, whilst also encouraging appropriate innovation.

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<sup>7</sup> The information contained in this document is sourced from the website of the Programme Validation of the University of Malta which can be sourced from <http://www.um.edu.mt/apqru/programmevalidationcommittee>

<sup>8</sup> The Senate is one of the governing bodies of the University. It largely responsible for the academic matters of the University primarily regulating studies, research, documentation and examinations at the University. The Senate also establishes the entry regulations.. The members of the Senate include the Rector, Pro Rectors, Deans of Faculties, Representatives of Institutes, student representatives and the Registrar. All new courses and programmes have to be approved by Senate.

**Roles of the Bodies Involved in the Programme Validation Process of the SoTo training Programme.** The bodies involved in the SoTo training programme validation process are as follows:

- **Programme Originators:** SoTo training programme was developed by the SoTo partnership in particular by KEK based on the State of the Art report prepared by the University of Malta (Institute for Tourism, Travel and Culture ITTC) who developed the 100 hour programme. The Programme originators (KEK and ITTC) on behalf of the SOTO partnership worked on the Stage 1 and Stage 2 (See Section on Stage 2 Approval on Page 4 for an explanation of the Structure of Stage 1 and Stage 2 Forms) forms that are required by the University of Malta when validating its courses and programmes.
- **Institute for Tourism, Travel and Culture Board:** responsible for considering 'In-principle' Stage 1 approval of a programme and making a recommendation to the Programme Validation Committee (PVC) and responsible for considering Stage 2 approval of a programme by making a recommendation to Senate, through the Programme Validation (PVC)
- **Academic Programmes Quality and Resources Unit (APQRU):** responsible for helping to ensure that programmes of study offered by the University are in line with regulations, bye-laws and University policies, whilst also considering their viability in relation to available resources and market demands
- **Programme Validation Committee (PVC):** responsible for recommending decisions for Senate approval after analysing the documentation submitted at both stages of approval
- **External Reviewers:** If deemed necessary the University will appoint an external reviewer. (Please see Appendix 1 for further information on the role of the External Reviewer)
- **Senate:** responsible for approving academic programmes offered by the University

**Overview of the Process.** There are two main stages in academic programme planning. **Stage 1** concentrates on the practicality and feasibility of the idea generated within the overall vision and strategy of the University. **Stage 2** focuses on the design and detailing of the programme

**Stage 1 Approval.** KEK and ITTC prepared the Stage 1 Proposal Form, which is intended to provide preliminary details of the proposed programme. The following areas of the form were prepared:

- The Rationale of the programme, giving the justification that the training programme addresses a major need in the area of tourism development and that it is being introduced in response to the changing needs of the traveller, within the wider context of making tourism more accessible. The programme also contributes to a growing area of training and research in the field of tourism and hospitality personnel.
- Training Programme objectives and their alignment to the vision of the ITTC and the University. The programme is also an original programme and no other course as yet exists at the University, or other European Institution.
- The need for this programme and its unique, distinctive and innovative features.
- The target group of course participants. In this case, tourism practitioners interested in acquiring insights into the management of social enterprise and the management of

social tourism within their organisation. In our case, pre qualifications were not necessary since we wanted to attract a wide audience, however persons already with knowledge of a tourism degree can do this programme as it will give them an added value. This requirement may be added, as it will give a further claim to the EQF level rating.

- The structure, objectives, and intended learning outcomes of the proposed programme. Including reasons for this training programme mainly that this programme is stemming from a market demand, research conducted for the SoTo project and it meets the need expressed by UNWTO and ISTO as well the basic fundamental right that tourism needs to be accessible to all. Moreover, the piloting phase of the course in the Soto Partner countries has also illustrated that such training programmes are also required by the respective tourism industries. Career prospects for course participants are good since persons doing this programme and obtaining the relevant qualification will have an added specialisation.
- Resources required. The pilot phase was supported by the Life Long Learning Programme however workings in terms of resources for teaching hours, lecture room space and visits need to be calculated. The staff chosen to train on the pilot phase proved to be adequate and persons involved from ITTC will continue to support the course, when required, through their own expertise.
- Financial Viability of the programme. Is the proposed programme financially viable? The programme initiator should take into account all resources required to implement the programme of study, as well as the expected number of students to be admitted in considering the financial viability of the programme.

## **Stage 2 Approval**

- KEK and ITTC on behalf of SoTo Partnership prepared Stage 2 Forms. These were modified again after the piloting of the training programme.
- Stage 2 Proposal Forms will be subsequently forwarded to APQRU
- If all documentation is submitted in line with requirements, APQRU forwards the Stage 2 Proposal to the P VC for recommendation
- Subject to receipt of a positive recommendation from the external reviewer (if deemed applicable), PVC submits its recommendation to Senate for confirmation of final approval

The Structure of Stage 2 Forms which needed to be applied for each of the four areas of the SoTo training programmes were based on the following areas.

### SECTION A – General

- A1. Study-unit code: Recommend to the Office of the Registrar a unique code comprising 3 letters indicating the department, division or programme and 4 digits. In our case the code of the units is TTC. Since the training course is a certificate at EQF level 4 we are proposing each unit starts with the digit 4 indicating the level rating and two other numbers given by ITTC. The level rating is something that we are still awaiting feedback on.

- A2 Study-unit title as per each of the areas developed through the SOTO training programme
- A3. Level: We are indicating that the level is at post qualification (since strictly speaking we are expecting to attract persons who are already employed in the industry BUT who may not have had any formal training as yet).
- A4. ECTS credits: The Total programme is of 100 hours and therefore it has an ECTS equivalence of 4 ECTS
- A5 Study-unit type: The type of delivery for each study-unit lecture, visit
- A6 Period of study: NOT APPLICABLE since study programme will be delivered at any given time outside the curriculum of the university.
- A7 Number of occurrences: NOT APPLICABLE
- A8 Department offering unit: NOT APPLICABLE
- A9 Faculty responsible: ITTC
- A10 Availability to visiting students: NOT applicable
- A11 Estimated student numbers: How many students are expected to register for and follow this study-unit?
- A12 Maximum class size: What is the upper limit on the number of students who can register for and follow this study-unit?

### SECTION B – Rationale

- B1 Indicate whether this approval form is being submitted for the purpose of proposing a new study-unit
- B2 Rationale for new unit - Part of the SoTo Training programme
- B3 From which academic year will this unit become available – 2014
- B4 Withdrawals (new study-units only): NOT APPLICABLE
- B5 By which Departmental or Faculty Committee has this study-unit been approved? ITTC in its Board Meetings of April 2014

## SECTION C – Study-unit details

- C1 C1. Name and status of Coordinating Lecturer: Names and status of respective tutors for each area were included, including their CVs
- C2 C2. Is this study-unit compulsory for any programme of study? YES all units are compulsory for the SoTo training programme.
- C3 Pre-requisite qualifications (if any): NOT APPLICABLE , although a note stating that knowledge of the tourism industry is required.
- C4 Pre-requisite study-units (if any): NOT APPLICABLE.
- C5 Co-requisite study-units (if any): NOT APPLICABLE.
- C6 Description of this study-unit: A brief statement of the general content of the study-unit was to be provided here. This statement will be used for any publication purposes related to the programme.
- C7 Study-unit aims: A brief, but clear, overall impression of the educational purposes of the unit, ensuring that they are consistent with, and contribute to, the aims of the programme(s) of which the unit is a part.
- C8 Learning Outcomes: Statements that specify what learners will know or be able to do as a result of following the study-unit. In this section, the skills and knowledge which students will acquire or develop during the study-unit were listed briefly, ensuring that these learning outcomes contribute to the learning outcomes of the overall programme(s) of which the unit forms part.
- C9 Teaching and learning methods: Details of the teaching and learning methods that will be used for the delivery of each study-unit, which could include the number of sessions which will make use of each method, as well as the duration of each.
- C10 Method of assessment: Indicate which method of assessment.
- C11 Recommended reading and references: Provide a list of the main text and any supplementary readings for this study-unit.

## Conclusion and recommendation

After the piloting activities in the different national contexts, the main conclusion formulated was that it is important and necessary to have a common training program on social tourism, in order to develop similar competencies in different European countries and /or regions. But, at the other hand, it is mandatory to adjust this program at the national specific of each country.

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Bellow is presented the suggestions made by VET partners of the project concerning the continuous improvement of the training offer:

1. The added value of this piloting course is to combine training, innovation and creation of networking, approaching the main stakeholders of the tourism sector and creating useful synergies for the territorial development and the communities, which share the same goals and the same sensitivity on social tourism.

The trainees, from different working backgrounds (travel agencies, cooperatives, social enterprises, hotels and catering companies etc.), illustrate their skills and management methods for their own services, aspects that allow the trainers to best define the training program aimed at developing integrated "tourist" and "social" competences. The training classroom becomes an environment where the creation of a network is simulated, where tourism and social economy operators work together, learning from each other and sharing contents and working methods to be replicated in their own territory and in their own organisational environment.

2. The training, as it is, is welcome in different touristic environments, being regions with experience in social tourism or regions that have developed recently, and social tourism is a new idea for them.

3. Since target groups differ and training needs vary, the SoTo programme has to be generic in order to be modifiable by the trainers to target specific and individual training needs at time of training.

The strengths of having a generic program are flexibility and adaptability. The weaknesses are the difficulty of developing similar skills in different countries and/European regions due to the lack of common "basic" content. The SoTo program identifies the basic elements for developing "integrated" skills and then leaves the flexibility to adapt them in regard to the specific training needs of each national and / or regional context.

4. The most important question asked by the participants on the training was: is the training accredited? Because a training of 100 hours should be. So the most critical issue, before starting the training program is to be accredited within the system of each country.

Nevertheless, the certification methodology developed should facilitate the process of the training program accreditation, in line with the current system of each country.

5. Its duration needs to vary according to target groups, i.e. from 2 weeks to 2 months since the participants are working people and cannot easily leave their work.

The longer the timescale for carrying out the training, the greater the need to make the course "involving" and "stimulating" in order to avoid significant dropout rates. This means constantly involving the trainee even in periods in which classroom activities are not scheduled, simply by giving them reading material or cases to solve relating to their own business environment. Materials that will then be discussed during classroom training sessions.

6. Another aspect that must be taken in account is the period of the year for delivering the course, because in tourism (at least in some countries or in some regions) there are no "out of season" periods. So a good point would be the training should be organized less intensive, distributed on a longer period of time, during the week, because the weekends are busy for the people working in tourism business. However, as mentioned above, the SoTo program aims to facilitate the carrying out of the training program in relation to the job-time of the trainees.

7. There are advantages and disadvantages in the homogeneity of the group. A homogeneous group of participants allows focusing on the subjects of interest for all. A heterogeneous group of participants, coming from various branches of the touristic sector, allows the comparison of different points of view and different approaches on social tourism, giving the possibility to build a broad and motivated debate in the classroom.

The SoTo program can be used in both contexts: homogeneous classroom, if it is decided to create and/or develop skills on specific contents, and in heterogeneous classrooms, when the specific content does not represent the central element of the course, but the starting point for sharing approaches, management methods of a service and the bringing together of skills between the tourist and the social economy operators involved in the training.

8. Last but not least, it is important to have an interdisciplinary team of trainers. Cooperation with two or more trainers (not more than 3) is optimal since discussions are fruitful and can enhance experience for the participants. The trainers should have different backgrounds covering at least three fields of activity: tourism, marketing and social work. The last specialty is important in order to make the sensitization towards vulnerable groups. The trainers need to be subject matter experts and provide valuable examples relating to national content and reality of the market.

The two/three trainers with different professional backgrounds present in the classroom take on the role of facilitators during the discussion and comparison between trainees and promote the exchange and sharing of knowledge, as well as the integration of skills.